



EHR Migration Best Practices: 5 Proven Strategies to Complete Your Project On-Time and On-Budget

How CIOs and other hospital IT leaders can keep their EHR migration projects running smoothly — from start to finish.

Introduction

EHR data migration projects have become far more complex in recent years — with more data to migrate, more categories to manage, more interfaces to coordinate, and more interconnected systems to navigate. At the same time, migration project leaders face growing pressure from C-suite executives and EHR vendors to meet increasingly tight timelines.

"CIOs and IT leaders face an extremely difficult dynamic," says Jim Hammer, FACHDM, PMP, Chief Operating Officer at Harmony Healthcare IT. "Migration projects have always been challenging, but the pressure to deliver on time and on budget is greater than ever."

As the complexity of migration projects grows, leveraging proven strategies is becoming essential for success. This guide addresses that need by identifying five EHR migration best practices, based on insights from Harmony Healthcare IT's migration team, which has guided hospitals and health systems of all sizes through successful migrations. With these proven tactics, CIOs and IT leaders can best position their organizations for successful and streamlined projects, despite the growing challenges.

On the Line: Operational Challenges, Patient Care Disruptions, and Wasted Resources

The stakes for EHR migration projects couldn't be higher. Delayed or failed migrations can disrupt hospital operations and compromise patient care. They can also consume valuable resources that many organizations cannot afford to waste, particularly as concerns mount about the financial impact of the "One Big Beautiful Bill." [Read our new report](#) to learn more about the federal legislation, how it could affect your hospital, and three actions IT leaders can take now to prepare.

Best Practice #1: Capture Cross-Functional Input — From the Start

[EHR migration projects](#) impact nearly every department in an organization — from legal and compliance to patient care and health information management (HIM). While most migration project leaders recognize the need for cross-department stakeholder involvement during certain phases of migration projects, the most successful migration leaders engage these individuals before their projects even begin.

“Everyone is dealing with time and resource constraints,” says Amanda Mais, FACHDM, Vice President of Data Integration at Harmony Healthcare IT. “While it may be tempting to try not to ask too much of other department leaders, getting started without their input is likely to contribute to serious challenges later.”

For this reason, she recommends forming a migration project team and meeting with them prior to project kickoff. Beyond the project leader and IT team members, this group should include representatives from the clinical, HIM, legal, compliance, billing, and finance departments. The team should also include an executive sponsor who can communicate goals, milestones, and challenges to other C-suite leaders throughout the project.

Another group that’s crucial to involve at the outset is your organization’s [data governance team](#). Most hospitals and health systems already have this team in place, but if not, it’s a good idea to form one, says Laurie Seall, VP of Operations at Harmony Healthcare IT. This team will be tasked with helping to ensure data integrity, security, risk management, and compliance throughout the project.

Without Early Cross-Functional Team Involvement, Your Project Risks:

- Underestimated timelines and budgets
- Overlooked specifications and requirements
- Misaligned expectations with executive leadership
- Poor stakeholder engagement and buy-in
- Staff resourcing challenges during critical phases

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— **Amanda Mais, FACHDM, VP of Data Integration, Harmony Healthcare IT**

"Your organization is likely to experience a more streamlined migration if a data governance team is engaged from the very beginning," explains Seall. "Throughout the project, teams will face complex, clinically driven decisions such as aligning data needs and workflows across care settings and responding to unexpected data anomalies that emerge during analysis. A dedicated governance team ensures these challenges are addressed swiftly and accurately, helping to maintain project momentum and reduce the risk of delays."

During initial meetings with the migration project and the data governance teams, Mais recommends focusing on each department's unique needs, concerns, and requirements, as this will help facilitate the creation of more comprehensive project timelines and plans.

Another key task to tackle during the first few meetings? Mapping out the project phases and identifying the staffing resources needed. Completing this activity early will help support proactive resource planning, which will also help prevent unexpected project delays (see Best Practice #4 for more recommendations related to staffing resources).

Once your project gets started, Mais recommends meeting regularly with the project and data governance teams to discuss progress, address challenges, and identify opportunities to streamline processes.

More Visibility, More Streamlined Processes

Harmony Healthcare IT recently launched an interactive validation portal that accelerates migration testing phases and centralizes feedback in real-time, replacing traditional email and spreadsheet communication. Data validators can quickly document their feedback within the portal where it is instantly accessible for triage by the data conversion team. Additionally, this approach allows for dashboards to be utilized by the migration project team as well as leadership to understand status on-demand.

"The approach streamlines testing and validation while ensuring data reviews reflect real-time updates," explains Mais. "It leads to shorter validation timelines and reduces the burden on internal teams, reducing user validation fatigue."

Best Practice #2: Consult with a Migration Partner — As Early as Possible

Just as early involvement from both a data governance and cross-functional project team will support a more streamlined migration, the same principle applies to engaging an [EHR migration partner](#). In fact, even a brief consultation before your project gets underway can save substantial time, resources, and costly surprises down the road.

"EHR migration projects are consistently underestimated in terms of time and resource requirements," says Hammer, noting that many projects require many rounds of extractions with different patient subsets and configurations. "A lot needs to happen in parallel with a migration partner to successfully complete these projects, which is why engaging them early is so important."

Three key benefits of early engagement with a migration partner:

1. More comprehensive planning and timeline management.

Every EHR migration project is unique, posing distinct challenges and opportunities based on the specific legacy system or systems involved and the go-forward EHR. Document handling can be complex in many source applications, as content can be encrypted or proprietary at rest, and/or require conversion to another format to be ingested into the go-forward system.

Partnering with an experienced migration partner early can ensure a comprehensive and strategic approach as well as more accurate timeline creation.

2. Earlier identification of time-sensitive activities.

Time-sensitive tasks are inherent to every EHR migration, and failing to identify them early often results in costly delays. A common example involves requesting data to be released from legacy EHR vendors, as some may take several months to provide hosted, encrypted, or proprietary information.

Organizations that don't initiate these data release requests with sufficient lead time frequently need to push back their project timeline, or trim downstream rounds of testing to make up time, which can introduce quality risks.

Engaging a migration partner early helps ensure time-sensitive activities like this are identified and completed at the right time, so that you can minimize the risk of project delays.

3. Improved stakeholder communication strategies.

EHR migration projects often follow predictable patterns, with certain phases presenting greater challenges than others. One example is the small-scale testing phase, during initial data loading and evaluation for mapping and conversion.

A seasoned migration partner can alert you to upcoming challenging phases, so that you communicate more proactively with stakeholders and C-suite leaders regarding what's coming. This can help support ongoing confidence and buy-in, despite any problems that arise.

Best Practice #3: Position Legacy Data Archiving as a Top Priority — Throughout Your Project

During an EHR migration project, the sole focus for many project leaders is the migration itself. As a result, the formation of a legacy data archiving strategy can sometimes be an afterthought. Organizations that tend to experience the most successful and streamlined migration projects, however, prioritize legacy data archiving from the start as part of their comprehensive transition program.

"Creating a [strong legacy data archiving strategy](#) early on in the project can provide significant benefits," says Seall, noting that having a clearly defined archive solution is essential for helping end-users understand what the future state of data access will look like once they are live on the go-forward system. "It enables clarity around which data elements and years of historical data will be available in the new environment, and how full legacy data can be accessed through the archive. This transparency not only enhances user confidence but also ensures a more complete and intuitive data experience."

There are also notable efficiency gains when archive and conversion efforts are executed in parallel, says Seall. Aligning data analysis, extraction, key decisions, and planning across both initiatives allows teams

to streamline workflows, reduce duplication, and accelerate delivery timelines.

Given the importance of a strong archiving strategy during migration projects, Seall recommends finding a migration partner that also specializes in [legacy data archiving](#). **The right partner can help you:**

- Create combined and comprehensive migration and archival goals and measurable success criteria
- Determine which data should be migrated, archived, and/or purged
- Develop compliant, secure, and accessible archiving processes
- Execute your archiving system rollout and efficiently migrate your data
- [Identify additional legacy systems](#) for decommissioning and archive integration

"The migration partner should come in strategically and advise, 'Here's what's worked well for others and here's what we recommend for you,'" says Seall. "The best partners will combine previous experience with customized solutions for your unique circumstances."

Insights from a Health System Leader

David Winn, VP of Information Services at Parkview Health, has helped dozens of organizations transition to Epic through the [Parkview Connect](#) program — including navigating the complex decision-making around legacy data archiving.

Some of his top priorities when planning archiving projects? Focus on cost savings, ensure single sign-on integration with the EHR for clinical access, and don't overlook the accounts receivable component. Winn recently shared detailed archiving strategies with Harmony Healthcare IT. [Read the Q&A](#).

Best Practice #4: Plan for — and Protect — Your Internal Resources

Today's teams are already overworked and stretched thin. That's why managing internal staffing needs is one of the most challenging aspects of EHR migration projects. At various phases of the project, individuals across multiple departments will be impacted.

"For director-level positions and below on the IT side, it can be extremely challenging to navigate competing demands," says Hammer. "On top of their day-to-day responsibilities, they also need to support the migration project and learn the new EHR being implemented."

Non-IT team members also feel the strain of new responsibilities. This includes clinical teams who need to help validate converted and migrated data, HIM teams who need to help determine legacy data archiving processes, and legal and compliance teams who need to help vet processes to ensure data security and compliance.

"During a migration project, you're constantly trying to beg and borrow time from these individuals whose time is immensely valuable and needed serving patients," Hammer notes. "When they're unavailable for essential decisions, project timelines can slip."

Transitioning to Epic? A Key Resource to Consider

Epic-Bridges certified experts are crucial if you are engaging in an [Epic migration](#). These individuals have completed extensive specialized trainings on building interfaces, loading data, proactively resolving problems, handling and triaging dashboard warnings, and more. When evaluating migration partners for an Epic implementation, make sure to prioritize partners who employ Epic-Bridges certified experts.

Three strategies for managing internal resource constraints:

1. Map out every staffing need at every phase.

Work with your migration project team to create detailed documentation of the internal and external resources that will be needed during each phase. While this may seem like a big lift, keep in mind that a strong migration partner will provide you with a detailed resource and infrastructure planning framework.

2. Communicate early and frequently.

After mapping out your phase-based staffing needs, share it with corresponding department leaders and discuss how their team members will be impacted. Then, throughout your project, provide department leaders with regular updates regarding upcoming resource needs and timing.

3. Discuss resource gaps with your migration partner.

While working through those two steps, you may find that you will need external resource support during certain project phases. The best migration partners will be able to recommend solutions and provide additional expertise and specialized skills as needed.

One particularly resource-intensive phase to plan for is the mapping of legacy data to the new EHR. Mais points to one recent project in which the migration team had to pull every historic lab value and enter it into the new EHR as single, discrete values. "Data mapping demands significant time and specialized resources," she explains. "If this effort isn't well-planned for, it can create significant project delays."

Best Practice #5: Build Your Data Conversion Working Environment — Within Your Own Infrastructure

Hosting the migration data conversion working environment within your own infrastructure, rather than relying on your migration partner's hosting, is the fifth best practice recommended by our experts. In fact, all of them point to this approach as one of the most effective ways to accelerate project timelines.

"It's much more efficient to work in the hospital's infrastructure as close to their production infrastructure as possible," says Mais, noting that this approach can sometimes eliminate weeks from project timelines. "Since data doesn't need to ping-pong back and forth between systems, things go much more quickly."

While it may feel daunting to set up the conversion working environment within your own infrastructure, your migration partner should help simplify this process and ensure it goes smoothly. **In fact, most effective migration partners will provide you with:**

- **Detailed infrastructure diagrams** showing optimal set up configurations
- **Technical planning discussions** to help prepare and configure your environment
- **Pre-configured virtual server images with software and proprietary tools pre-loaded** (if your virtual environments are compatible)

Your migration partner should also provide a series of working sessions, early in your project, to proactively resolve any server access and permission issues that might crop up later.

"Addressing potential blockers early saves time and frustration in the long run," explains Hammer. "It significantly reduces the amount of time-consuming back-and-forth emails and IT tickets that need to be submitted."

How One Organization Decreased Its Migration Project Timeline by 16 Weeks

Harmony Healthcare IT recently supported a hospital migration project during which the hospital opted to set up the data conversion environment within their own system. The impact? The overall migration timeline decreased by 16 weeks, says Mais. "This can be a game-changing strategy for organizations seeking to accelerate their project timelines."

Moving Forward with Confidence and Speed

Successfully completing EHR migration projects on time and on budget is not easy, but implementing these five best practices can significantly increase the likelihood of success.

Working with a highly experienced data migration and archiving partner can also help — relieving much of the burden your team experiences and ensuring a smooth and streamlined project from start to finish.

Harmony Healthcare IT has helped more than 500 healthcare customers navigate complex EHR migration and archiving projects and has experience with more than 700 EHR and ERP software brands, including Epic, Oracle Health (Cerner), MEDITECH, McKesson, athenahealth, Allscripts, and more.

Reach out today to learn more about our specialized services and support for EHR migration projects.

