

Convert vs. Archive Decision Guide

Epic Conversions

Overview

One of the most consequential decisions in an Epic conversion is determining what data to convert to Epic and what to move to an archive. The right approach will vary depending on your source system, data volume, clinical workflows, and regulatory requirements. This guide provides general guidelines to help frame that decision. Use it as a starting point for conversations with your conversion partner and clinical stakeholders, not as a one-size-fits-all approach.

Timing

The convert vs. archive question should be asked and addressed early in your conversion project. This ensures adequate time not only to make sound decisions regarding your approach — but also supports the selection of a strong archiving solution.

Team

Decisions regarding conversions, archiving, and purging should not be made by IT alone. Critical other stakeholders include HIM, clinical, finance, and legal and compliance.

If your organization has a firm date to decommission the legacy system, early initiation of an archive strategy can also help ensure you meet that date.

Solution Considerations

Key capabilities to prioritize in an archiving solution include:

- SSO to allow clinicians easy access to historical records from within Epic
- Secure Record Delivery for direct release of records from the archive
- MPI synchronization to maintain consistent patient identity
- Legacy Record Indicator to inform from within Epic if legacy archived data exists
- Reporting and auditing tools
- A/R wind down capabilities

General Guidelines



Data to Convert
to Epic

- ✓ Recent and actively referenced at the point of care
- ✓ Needed to support ongoing treatment decisions or EHR automated workflows
- ✓ Associated with patients who are likely to return for care



Data to Move
to an Archive

- ✓ Older or from inactive patient populations
- ✓ Infrequently accessed but required for compliance or legal needs

A note on purging: Conversion and archiving decisions should also account for data that does not need to be retained and can be eliminated such as handling deceased patient records.

Key Questions to Help Guide Your Decisions

How recently was this data generated?

Decisions about the number of years to migrate by data category drive conversion scope. Older records are strong archive candidates, though regulatory requirements and specialty-specific needs may extend that window.

How frequently will clinicians need access to this data post go-live?

Data that is rarely accessed but must be retained for compliance is well suited to an archive.

What are the regulatory retention obligations?

State and federal requirements vary by data type and patient population. Your archive approach must meet those requirements.

To discuss your organization's convert vs. archive strategy, [schedule a complimentary consultation with Harmony Healthcare IT.](#)

[Learn more about our Epic conversion approach.](#)

[Harmony Healthcare IT](#) is a data management firm that moves, stores, and manages patient, employee, and business records for healthcare organizations. Since 2006, our U.S.-based experts have worked with over 700 healthcare software platforms across clinical, financial, and administrative systems. We've built our reputation transforming critical data into secure, compliant, and accessible assets – whether that is converting data to a new platform or securing it in an archive.