



Nine EHR Migration Missteps That Derail Projects

Critical mistakes that every CIO and IT project leader should avoid.

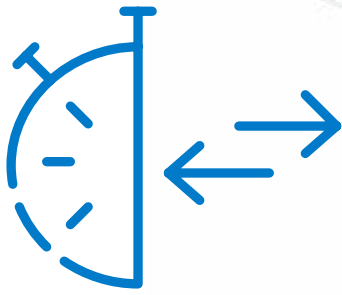
EHR migration projects are extremely difficult to navigate, and unfortunately, even minor missteps can result in significant challenges. As with any project your hospital or health system takes on, knowing the key mistakes to avoid can significantly increase the likelihood of a streamlined and successful initiative.

This guide is designed to arm you with that knowledge. Developed based on our experience supporting hospitals and health systems of all sizes through migration projects and input from several of our customers, it identifies nine missteps that consistently threaten project success.

Whether you're planning your first migration or recovering from a challenging previous experience, understanding these common pitfalls will help you navigate your next project with greater confidence and better results.

Looking for more resources to support your EHR migration project?

Check out our [Five EHR Migration Best Practices](#).



Misstep #1: The Late Engagement Trap

Migration projects fueled by EHR transitions have many moving parts, and project leaders sometimes kick off with their go-forward EHR vendor before consulting a migration partner. However, not involving a migration partner early often contributes to unrealistic timelines and unnecessary delays later.

Recommended Approach:

Have an initial consultation with your migration partner before your EHR implementation planning begins. Your migration partner will help formulate a more comprehensive and detailed project timeline that aligns with your unique challenges, opportunities, legacy EHR(s) and other systems, and go-forward system.

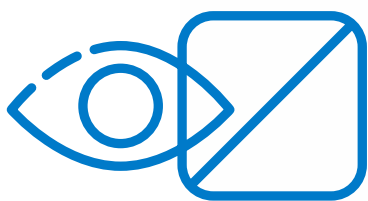
Key Benefits:

- Avoid setting yourself up for unrealistic deadlines or resource crunches
- Identify internal and external staffing needs before they become bottlenecks
- Complete time-sensitive activities before they cause project delays
- Ensure data availability and any source vendor data requirements or nuances

“

Starting your EHR project without migration expertise is like diagnosing a patient without reviewing their medical history. You're going to miss essential information required for an optimal outcome.”

- **Jim Hammer**, PMP, FACHDM, Senior Partner and Chief Operating Officer, Harmony Healthcare IT



Misstep #2: The Cross-Department Blind Spot

Time and resources are strained at most hospitals and health systems, so everyone is searching for ways to streamline processes. Still, it's critical to involve [cross-department leaders in project planning](#). In fact, not involving these individuals can lead to significant blind spots that contribute to unexpected issues, changes, or additional scope throughout your project.

Recommended Approach:

Form a cross-department migration team and begin meeting with them regularly before your project begins. This will result in a more comprehensive project plan, more proactive resource planning, and greater buy-in across departments.

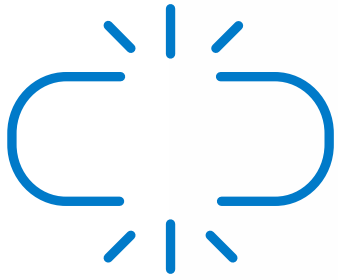
Key Benefits:

- Incorporate each department's unique challenges, requirements, and specifications into your migration plan
- Understand which staff members will be needed when, preventing last-minute scrambling
- Ensure department owners feel heard, involved, and engaged

“

The most successful migrations are achieved when stakeholders actively contribute to designing the plan, rather than simply executing it.”

- **Amanda Mais**, FACHDM, Vice President of Data Integration, Harmony Healthcare IT



Misstep #3:

The Data Governance Team Disconnect

Most hospitals and health systems already have a [data governance team](#) in place — typically tasked with crafting organization-wide data policies, security requirements, and compliance standards. Still, some project leaders underestimate how critical early input from this team is to overall migration project success. When data governance teams are brought in late to projects and feel like secondary participants that often leads to slower question resolution and project delays.

Recommended Approach:

As soon as your organization begins considering a migration project, set up a dedicated meeting with your data governance team. Ask them to share their preferred partnership strategies and recommended best practices. The team will appreciate your forethought and consideration, which will help foster strong engagement throughout the initiative.

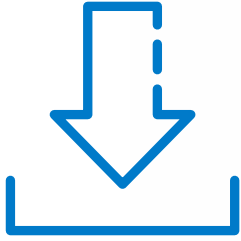
Key Benefits:

- Get faster responses to unexpected data anomalies that emerge during analysis
- Make more informed decisions regarding aligning data needs and workflows across care settings
- Ensure all data-related processes meet your organization's internal standards

“

Data governance isn't just about policies — it's about having the right people ready to make critical decisions quickly. Without a highly engaged team, every data question can become a project delay.”

- **Laurie Seall**, VP of Operations, Harmony Healthcare IT



Misstep #4: The Archive Afterthought

The top priority during migration projects is efficiently and securely migrating data to the go-forward EHR. But project leaders sometimes become so focused on migration that they overlook key decision-making related to data archiving. Failing to craft a strong data archiving strategy at the outset can lead to decreased user confidence, an incomplete and less intuitive data experience, and project inefficiencies.

Recommended Approach:

Develop your [legacy data archiving strategy](#) at the same time you develop your data migration plan. This will support more proactive and informed discussions related to your archiving approach. Working with a migration [partner that also specializes in legacy data archiving](#) will help [ensure optimal decision-making](#) throughout your project.

Key Benefits:

- Streamline workflows by aligning data analysis, decisions, and planning across both initiatives
- Ensure regulatory compliance while maintaining efficient access to historical records
- Enhance user confidence through clear communication about data availability and archive access

“

When any hospital makes the decision to move forward with a new EHR, the discussion around what data will be converted versus what needs to be archived must be at the forefront of decision-making.”

- **Scott Smiser**, FACHE, FHIMSS, CHCIO, healthcare IT consultant



Misstep #5: The Scope Evaluation Trap

The migration and archiving vendor market has expanded significantly, giving organizations multiple partners and approaches to consider — each with different levels of comprehensiveness, maturity, and expertise. While some vendors offer accelerated approaches, they may exclude certain data types, such as treating unstructured documents like scans and images as a different workstream. More limited approaches may even result in lost data that can never be recovered.

Recommended Approach:

Look for a partner that can help you identify the best approach for your unique needs. If one vendor's timeline is significantly shorter than others, ask how they achieve those results and what trade-offs are involved.

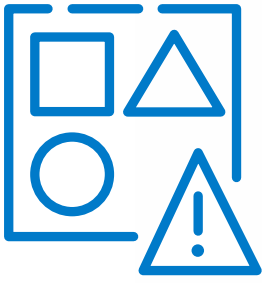
Key Benefits:

- Find a partner that provides realistic project timelines and costs
- Benefit from comprehensive approach that meets your unique needs
- Avoid hidden fees and timeline delays

“

Look under the hood when evaluating partners. Some overpromise on capabilities and timelines, while others present quotes with hidden fees that surprise you later. It's a good sign when a potential partner is asking you lots of questions during initial meetings — that means they're considering all factors to give you a comprehensive project estimate.”

- **David Winn**, MBA, CHCIO, RHIA, Vice President of Information Services, Parkview Health



Misstep #6: The Internal Resource Surprise

Migration projects impact multiple departments beyond IT — including clinical, HIM, legal, and compliance. Missteps in communicating resource needs and timing to these departments often lead to project delays because critical staff are unavailable during key phases.

Recommended Approach:

Map out your internal staffing resource needs by project phase and department. Then, communicate those requirements to department leaders well in advance. Also, regularly update them throughout the project regarding upcoming needs.

Key Benefits:

- Ensure milestones are completed on schedule
- Enable department leaders to plan more proactively around migration needs
- Foster more project buy-in among department leaders and their teams

“

When you give department leaders weeks or months of notice about their or their team members' involvement, they can plan accordingly. When you give them days, they have to scramble.”

- **Laurie Seall**, VP of Operations, Harmony Healthcare IT



Misstep #7: The Skills Shortage Gamble

Many organizations underestimate the specialized skills and bandwidth required for successful EHR migrations. Failing to adequately plan for [external resource needs and support](#), however, often results in project delays and quality issues.

Recommended Approach:

Work with your migration partner to identify all required skills and specialized roles needed. Then, ask for their recommendations regarding how to fill any internal gaps with external expertise.

Key Benefits:

- Avoid delays caused by learning curves or resource bottlenecks
- Access specialized expertise that may not exist internally,
- Allow internal teams to concentrate more on their core responsibilities

“

There has definitely been a shift to single sourcing migration and data archive partners vs. using internal or labor augmentation for migration separate to archive. This makes complete sense as there is definitely efficiency gained in selecting a single partner who becomes knowledgeable about the systems and data to be migrated and ultimately decommissioned post archival.”

- **Jim Hammer**, PMP, FACHDM, Senior Partner and Chief Operating Officer, Harmony Healthcare IT



Misstep #8: The External Hosting Slowdown

Many organizations opt to have their migration partner host the data conversion working environment externally within their partner's own infrastructure. This approach, however, often results in longer project timelines due to data transfer delays and system compatibility issues.

Recommended Approach:

Set up the migration data conversion working environment [within your own infrastructure](#) as close to your production infrastructure as possible. An effective migration partner can work with you to ensure proper setup and configuration so that everything goes smoothly.

Key Benefits:

- Eliminate data transfer delays between external systems
- Work directly within your network environment for optimal compatibility and performance
- Maintain greater control over your data throughout the conversion process

“

Every data transfer introduces incremental time, which accumulates significantly in later migration rounds as data volumes grow or files require adjustments. Streamlining the process by removing extra steps is essential for maintaining speed and efficiency.”

- **Amanda Mais**, FACHDM, Vice President of Data Integration, Harmony Healthcare IT



Misstep #9: The Blindsided Leadership Problem

Migration projects follow predictable patterns, with certain phases consistently presenting greater difficulties than others. Not preparing stakeholders for these more challenging project phases — ahead of time — often results in unnecessary anxiety and resistance when issues arise.

Recommended Approach:

Work with your migration partner to identify which project phases are most likely to generate complications, then proactively communicate these expectations to key stakeholders.

Key Benefits:

- Ensure temporary setbacks are seen as normal parts of the process
- Keep leadership calm and informed during more challenging phases
- Approach challenges constructively rather than reactively

“

Small-scale or initial testing almost always presents technical opportunities during migration projects to learn and adapt from. When stakeholders know this upfront, they see problems as expected challenges rather than failures.”

- **Jim Hammer**, PMP, FACHDM, Senior Partner and Chief Operating Officer, Harmony Healthcare IT

Ready to Avoid These Migration Missteps?

Whether you're in the early planning stages of an EHR migration or need support with a project already underway, our team has the experience to help you sidestep these common pitfalls and ensure your project goes smoothly from start to finish.

Contact us today to discuss your migration needs and learn how our expertise can help ensure your project achieves the outcomes your organization deserves.

About Harmony Healthcare IT

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.

harmonyhit.com 🌐 | 800.781.1044 | info@harmonyhit.com

©2026 Harmony Healthcare IT. All rights reserved. All other trademarks are the property of their respective owners; Harmony Healthcare IT is not affiliated with their respective owners unless otherwise noted.

Rev. Feb 2026