

The Healthcare Data Archiving Vendor Evaluation Guide

Top considerations for hospitals and health systems

Seven Critical Evaluation Areas

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Executive Summary

In a crowded market, it can be difficult to evaluate which healthcare data archiving solutions will deliver lasting value. Many vendors overpromise and underdeliver, falling short when it comes to preserving data integrity, ensuring long-term accessibility, meeting evolving compliance requirements, and enabling AI readiness.

The consequences are significant: limited access to critical historical data, increased risk, unnecessary system costs, and diminished ROI. Hospitals and health systems can't afford to get archiving wrong.

This guide will help you avoid common pitfalls and take a more strategic approach to healthcare data management partner evaluations. While not an exhaustive checklist, it walks through seven critical evaluation areas, from technical execution to ROI and strategic fit, to help you evaluate vendors with greater confidence and clarity.

57%

of health IT leaders are planning a legacy data archiving project in the next two years.

Source: Q4 2025 survey of CHIME members commissioned by Harmony Healthcare IT and conducted independently by CHIME

What You'll Learn

- How to identify qualified partners
- How to protect data integrity
- How to optimize record access
- How to reduce security risks
- How to maximize ROI
- How to avoid execution pitfalls
- How to position for AI and M&A

Foundational Considerations

Before evaluating detailed technical features, security controls, or ROI capabilities, health IT leaders should assess whether a vendor meets core qualifications. Vendors that fall short may struggle with data complexity, workflow integration, and execution.

Harmony Healthcare IT's KLAS Performance:

- Ranked a **top 3** archiving vendor
- Performance above **90 out of 100** every year since 2021
- Recognized for excelling in **high-complexity projects**

Core Requirements

	Requirement	What to Consider
☐	Expertise Across Hundreds of Systems	Vendors with limited system exposure are more likely to encounter unexpected complexity. Look for a partner with experience across hundreds of clinical, financial, and administrative systems, including deep familiarity with your specific platforms, to ensure proven methodologies and fewer surprises.
☐	Deep Workflow Integration	Vendors that deliver standalone repositories rather than EHR/ERP-integrated archives create friction for clinical and operational users. Look for a partner that enables Single Sign-On directly from the EHR, along with automated indicators within the EHR that signal when legacy records exist for a patient. See pg. 4 and 6 for specific technical capability requirements
☐	Rigorous Security and Compliance Measures	Vendors without independently validated security controls introduce risk to your patient data and compliance posture. Look for a partner that is HITRUST r2 Certified, maintains SOC 2 Type II facilities, provides 24/7/365 monitoring, and demonstrates mature third-party risk management practices. See pg. 7 for specific security and compliance requirements
☐	KLAS Track Record	Vendors without independent validation of their performance make it harder to separate claims from results. While no single rating should determine vendor selection, consistent KLAS recognition can substantiate a vendor's quality, consistency, and long-term partnership value.

Extraction and Archiving

While many archiving vendors describe similar capabilities, technical execution varies widely in practice. It's important to evaluate not only what a vendor claims to support, but how reliably those capabilities perform in healthcare environments.

Core Capabilities

	Criteria	What to Evaluate	Why it Matters
☐	Extraction Methodology	The vendor should clearly define their extraction approach, including whether they use full database extraction, application-layer extraction, or a combination, and explain when and why they use each method. It is equally important to understand whether the vendor performs the extraction directly or expects your organization and/or the application vendor to provide the data, as this can impact project costs.	Different methods capture different data. Application-layer extraction is faster but can miss underlying data elements, embedded content, and BLOBs. Full database extraction is more complete but requires greater expertise to execute without disruption. The right approach depends on your scope, timeline, and defensibility requirements — and a strong vendor will make that decision transparently, not by default.
☐	Structured and Unstructured Data Handling	The vendor should support extraction of both structured data (tables, coded values, discrete fields) and unstructured data (clinical documents, scanned forms, images).	Vendors that handle only structured data leave gaps in the legal medical record. Unstructured data often requires separate processes or specialized tooling — and organizations that manage it through multiple vendors introduce handoff risk and normalization gaps that are difficult to detect and costly to fix.
☐	Data Completeness and Validation	The vendor should apply a rigorous validation framework, including reconciliation against a source-of-truth reference copy, and documented chain of custody — before, during, and after extraction.	Extraction is not just about moving data, it is about proving what existed and preserving its integrity. Partial extracts make it difficult to determine whether missing data was never present or simply not captured. A defensible chain of custody is essential for audit, legal, and compliance purposes long after the legacy system is decommissioned.
☐	System Performance During Extraction	The vendor should clearly define how their extraction approach minimizes performance impact on legacy systems that may still be supporting active clinical or operational workflows during the project	Extraction from a live system introduces real operational risk. Poorly managed extraction processes can degrade system performance, slow clinical workflows, and in the worst cases, force unplanned downtime. Look for vendors with documented protocols for throttling extraction activity and coordinating around peak usage periods.



Expert Note: System-Specific Considerations

One of the most important factors when selecting a legacy data archiving partner is ensuring the vendor has substantial, proven experience with both the systems being retired and the systems that will remain in use going forward.

While every legacy application presents unique challenges, healthcare organizations should be cautious of vendors that position archiving as a one-size-fits-all exercise. Differences in database architecture, data models, customizations, extraction methods, integrated applications, and historical version changes can significantly impact the completeness, usability, and defensibility of archived data.

Whether the source system is Oracle Health (Cerner), MEDITECH, a departmental application, or another clinical, financial, or operational platform, successful archiving requires expertise that is specific to that environment.

The examples below illustrate how platform-specific knowledge can directly influence project outcomes and long-term access to historical data:

Oracle Health (Cerner) Archiving

Oracle Health (Cerner) environments present a fundamental extraction methodology decision: RMAN (full database extraction, including BLOBs, forms, and images) versus CCL (faster, application-layer extraction that can miss underlying data elements).

These approaches are not mutually exclusive, but the choice has long-term consequences for data completeness and defensibility.

Look for a vendor that evaluates both methods based on your specific scope and requirements and can clearly explain the trade-offs rather than defaulting to one approach.

MEDITECH Archiving

MEDITECH's proprietary database architecture requires specialized extraction expertise that is increasingly scarce as the pool of experienced MUMPS developers shrinks.

Organizations running older MEDITECH versions — Magic, Client/Server — face additional complexity from years of version evolution and system-specific customizations.

Look for a vendor with hands-on MEDITECH experience across versions and commonly integrated systems such as LSS, PTCT, Pyxis, and OnBase, not just general archiving capability applied to MEDITECH environments.

Archive Access and Usability

Archived data is only valuable if authorized users can reliably access it when needed from the go-forward application. Evaluate whether the archive supports user access, interoperability, and release of information workflows that align with clinical, HIM, and operational needs.

“

Financial savings were the biggest driver for using HealthData Archiver®, and we have fully achieved those outcomes. Integration with our Epic EHR was the largest feature, hands-down, that helped us achieve the outcomes.”

– Analyst/Coordinator, November 2025, KLAS Research

Core Capabilities

	Capability/Feature	Value/Benefit
☐	Single Sign-On (SSO) Integration	Eliminates the need for separate logins, reducing friction for clinicians and authorized staff.
☐	Secure Record Delivery	Enables delivery of archived historical patient data to a designated EHR endpoint.
☐	Legacy Record Indicator	Provides in-context visibility that archived historical records exist, saving users clicks and increasing efficiency.
☐	MPI/EMPI Backload	Links historical patient records to the enterprise master patient index (MPI/EMPI).
☐	MPI/EMPI Synchronization	Maintains accurate patient identity over time as records are merged or unmerged in the production EHR.
☐	Reporting/Analytics	Enables reporting and insight generation from archived data.
☐	Data Export/Sharing	Enables secure sharing of archived data with downstream systems and partners.
☐	DICOM Viewer	Provides access to historical imaging across multiple modalities.
☐	Destruction/Purge	Enables compliant, auditable data elimination in accordance with organization-specific retention policies.
☐	A/R Wind Down	Supports all ranges of financial account resolution needs after system decommissioning.

Security and Compliance

Legacy data archiving can significantly reduce security exposure by enabling the decommissioning of outdated, vulnerable systems. Archiving solutions, however, introduce new third-party pathways to sensitive data. Key third-party risks include:

- **Expanded attack surface.** Each third-party vendor granted access to your system creates another potential entry point for attackers.
- **Outdated security practices.** Vendors operating with unpatched systems and vulnerable technology can increase your security risks.
- **Superficial compliance practices.** Vendors that lack substantive security assessments can also increase your security risks.



Expert Note:

Nearly one-third of healthcare security breaches originate from third parties, including technology vendors, making vendor security posture a critical component of any archiving decision.

Core Principles

	Security Principles	What it Means for Your Organization
☐	HITRUST r2 Certification	The vendor meets the highest level of healthcare security and privacy controls, validated by third-party audit.
☐	Mature GRC Foundation	The vendor maintains a mature governance, risk, and compliance program that includes HIPAA compliance, SOC 2 Type II facilities, enterprise risk management, third-party risk management, and formal security policies.
☐	Data Protection	The vendor protects patient and business data through encryption, data loss prevention (DLP), secure storage, backup protections, and governance controls that reduce the risk of data exposure..
☐	24/7/365 Network, Identity, and Endpoint Monitoring	The vendor engages in proactive threat detection and response.
☐	Strong Identity Security Controls	The vendor protects access through least privilege principles, MFA, account takeover prevention, continuous authentication controls, and in-depth access governance.
☐	Vulnerability Management	The vendor ensures continuous identification and timely remediation of security weaknesses.

Return on Investment

Cost reduction is a top driver of legacy data archiving projects, but not all vendors can deliver on that promise. Use the following criteria to distinguish vendors with a track record of measurable, reliable ROI from those relying on theoretical or oversimplified projections.

Key Considerations

	Evaluation Criteria	What to Look For
☐	Speed to ROI	Capabilities that accelerate extraction, migration, and archiving — enabling faster implementation and earlier ROI / clear demonstration of how technology drives these efficiencies.
☐	Proven ROI Consistency	Credible customer references that consistently demonstrate ROI across similar organizations.
☐	Operational Efficiency	Key capabilities that reduce ongoing effort, such as Single Sign-On, unified access across legacy systems, fast search, and AI-assisted workflows.
☐	Scalable Decommissioning	A repeatable approach that enables efficient, multi-system decommissioning over time, even in complex environments.

\$1M+

saved every year by nearly one third of Harmony Healthcare IT customers.*

4 in 5

Harmony Healthcare IT customers report strong or exceptional ROI.*

2-3X

ROI reported by most Harmony Healthcare IT customers.*

*Source: Results reported by 46 Harmony Healthcare IT customers

Project Execution

Health IT leaders should assess execution capabilities as rigorously as technical and security requirements, as weaknesses in this area are a common cause of stalled or over-budget archiving initiatives.

Key Considerations

	Execution Factor	What to Evaluate
☐	Timeline Discipline	The vendor should clearly define expected timelines based on organizations and projects of similar size and complexity and demonstrate a consistent record of on-time delivery.
☐	Impact on Current Systems	The vendor should clearly define an extraction approach that minimizes performance impact on legacy systems that may still support active clinical or operational workflows.
☐	Communication Cadence	The vendor should provide a main point of contact, regular status reporting, and clear escalation paths — and should proactively identify potential risks or challenges before they affect timelines or outcomes.
☐	Ongoing Support	The vendor should provide a clearly documented support model, including response time commitments, dedicated contacts, and in-house support resources.
☐	Change Management Support	The vendor should provide training resources and user documentation tailored to clinical, HIM, and operational users, and should demonstrate a structured approach to adoption that accounts for varying levels of technical comfort across roles.

“

Harmony Healthcare IT is fantastic. They're easy to get along with. They're easy to reach, and they're responsive. They're leaders. They're a great company. Their CEO is wonderful and definitely leads by example, and I think that shows in the company and the way they treat their people.”

— Manager, July 2026, KLAS Research

Long-Term Impact

The strongest archiving partners are consultative and collaborative. During initial meetings, they will ask about future plans and goals, including those related to consolidation and AI, to help build the most effective strategy for your needs.

M&A Readiness

Healthcare consolidation continues to accelerate, and legacy data archiving is almost always a critical workstream in the event of a merger, acquisition, or divestiture. Vendors that lack experience can introduce data integrity risk, delays, and added internal burden.



Expert Note:

Preventing Technology Sprawl During M&A

While M&A can accelerate growth and innovation, it can also create technology sprawl if legacy applications are not effectively retired. Organizations that leverage experienced data migration and archiving partners benefit from a repeatable, scalable process for consolidating systems and preserving access to historical clinical, financial, and operational records. This helps maintain security, compliance, and accessibility as newly acquired applications are integrated into the technology landscape.

Key Considerations

	Execution Factor	What to Evaluate
☐	Multi-Facility and Multi-System Experience	The vendor should have experience working across complex, multi-entity environments with disparate EHRs and ancillary systems, and should be able to reference prior M&A-related engagements of similar scale and complexity.
☐	Patient Record Reconciliation	The vendor should have a clearly defined approach to patient mapping and record reconciliation across legacy and go-forward systems, ensuring data integrity is maintained throughout and after a consolidation event.
☐	Redundant System Decommissioning Strategy	The vendor should present a clear, repeatable strategy for coordinated archiving and systematic decommissioning across all affected systems, including a defined process for identifying and resolving duplicate or unnecessary platforms post-merger.

AI and Analytics Readiness

When properly structured and accessible, archived data can support population health analytics, quality reporting, risk stratification, and AI development. Health IT leaders should evaluate whether a vendor's archiving approach preserves data in forms that support future analytical use, in addition to long-term retention.

Key Considerations

	AI/Analytics-Related Needs	What to Seek Out in a Vendor
☐	A Foundation for Population Health and Quality Reporting	Complete, structured, and queryable historic data across patient populations.
☐	A Foundation for Risk Stratification and Care Management	Longitudinal patient data spanning multiple EHR generations and care settings.
☐	A Foundation for AI Model Training and Validation	Accurately transformed and complete data with defined governance controls.
☐	A Foundation for Reporting for Analytics	Easy, auditable access to historical data for quality reporting and analytics and downstream data export/ interoperability requirements.



Expert Note: AI in Archiving ***A Value-Driven Approach***

Vendors are increasingly incorporating AI into archiving solutions. Organizations should prioritize vendors that embed purpose-built AI directly into core workflows, ensuring it drives meaningful, measurable outcomes rather than adding complexity without clear return. AI in an archive should be evaluated by its ability to deliver against clearly defined business KPIs, such as reducing operational effort, enhancing compliance, or increasing efficiency.

Final Recommendations

Your archiving vendor decision will shape how your organization manages risk, controls costs, and accesses critical data for years to come. The vendors that deliver the most value understand the complexity, have walked this path with organizations like yours, and can demonstrate results.

Health IT leaders who approach vendor selection with rigor are well positioned to execute successful projects that free up budget, reduce risks, and set their organization up for a successful, long-term health data management strategy.

Use the evaluation criteria in this guide as your RFP foundation, and look for a vendor with answers that reflect real operational experience, not just a polished pitch.

Helpful resources:

- [Healthcare Legacy Data Management Guide](#)
- [How to Maximize Legacy Data Archiving ROI](#)
- [Making the Case for Legacy Data Archiving](#)
- [Healthcare Data Archiving Solutions](#)
- [RFP Template](#)

Contact us to learn how we can support your archiving initiatives.

About Harmony Healthcare IT

Harmony Healthcare IT is a data management firm that transforms critical data into secure, compliant, and accessible assets — whether that is converting data to a new platform or securing it in an archive. Since 2006, we have worked with over 700 healthcare software platforms across clinical, financial, and administrative systems. Our commitment to reliability and innovation empowers healthcare organizations to manage their data with confidence.



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