The Archive Switch Playbook

The Guide for Healthcare Organizations Considering Making a Change

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Is Your Archive Keeping Up?

Legacy data archiving has changed considerably over the past few years, and many solutions that were once considered market-leading have struggled to keep pace. Tighter compliance requirements, deeper EHR integration needs, and the growing demand for real-time access to historical data have raised the bar.

Hospitals and health systems that continue to rely on outdated or underdeveloped archiving solutions risk missing out on critical benefits, including streamlined workflows, automation, faster ROI, and more informed clinical decision-making.

This playbook will help you evaluate your current archiving strategy, determine whether a change is needed, and understand how to successfully navigate a transition if it's the right approach for your organization.

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Ten Common Signs that Indicate Vendor Underperformance

- Legacy system decommissioning timelines slip due to delays, scope gaps, or lack of confidence in archived data quality and completeness.
- The vendor can only begin a limited number of projects at a time, or cannot complete certain systems within the application rationalization inventory.
- The vendor doesn't have evidence of long-standing health system partnerships that support holistic data management needs.
- Vendor contacts are unresponsive or slow to escalate and resolve issues.
- EHR-archive integration is limited, manual, or disruptive to clinical workflows.
- Clinicians or HIM teams cannot easily access or trust historical records.
- Clinicians must navigate outside the EHR to determine whether legacy patient data exists.
- The vendor lacks a clear approach to leveraging AI within its solution.
- The vendor cannot explain how its solution will support your future AI initiatives that may rely on legacy data.
- The vendor avoids or cannot clearly answer questions about upcoming features and capabilities.

How to Determine Whether Your Archiving Approach Meets Modern Standards

When determining whether it's time to switch archiving vendors, it helps to understand what a modern archiving solution delivers. The table below outlines the gap between underperforming solutions and the current standard, across six core functions.

Function	Old Approach	Modern Standard	Benefits
Access	Requires logging into a separate system, forcing clinicians to leave the EHR and re-establish context.	EHR-native access with Single Sign-On preserves authentication, patient context, and governance.	**Clinicians:** Less workflow disruption, faster access to history. **Organization:** Stronger governance, fewer inefficiencies. **Patients:** More informed care decisions.
Awareness	No indication in the EHR that legacy data exists, leading to incomplete clinical context.	EHR indicators flag the presence of legacy data for each patient.	**Clinicians:** Clear visibility into available history. **Organization:** More consistent use of archived data. **Patients:** Lower risk of incomplete context in care decisions.
Retrieval	Manual searches across systems by clinicians, HIM, and rev cycle teams.	Fast keyword search across structured and unstructured data.	**Clinicians:** Faster access to information for care decisions. HIM: Reduced time locating records. **Organization:** Lower admin burden, improved productivity. **Rev Cycle:** Quicker access to supporting documentation.
Analysis	Manual review of large record volumes to validate compliance, accuracy, or release.	AI-assisted analysis flags compliance risks and data issues, reducing manual effort.	**HIM:** Faster, more comprehensive reviews. **Organization:** Improved compliance readiness and efficiency. **Patients:** Lower risk of incomplete/inaccurate record handling.
Release	Record release workflows are manual, increasing effort and risk.	Automated, secure delivery to designated EHR endpoints.	**HIM:** Faster release workflows. **Organization:** Less manual effort and risk. **Patients:** More timely record access.
A/R Wind Down	Reliance on static PDFs or screenshots, requiring legacy systems to remain online or limiting recovery.	Active A/R workflows continue post-decommissioning, with tiered solutions to meet unique needs.	**Organization:** Faster decommissioning and improved revenue recovery. **Patients:** Fewer account resolution delays. **Rev Cycle:** Continued access to workflows and account details.

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Understanding the Difference Between a Vendor and a Strategic Partner

While the capabilities of modern archiving solutions are critical, they are only part of the equation. The strength of your vendor as a long-term partner is just as important.

Common challenges that arise due to poor vendor partnerships include:

Slow follow-through from vendors on various aspects of archiving projects, despite early assurances and promises.

Limited ongoing support, including little or no contact with the original account representative.

Unclear escalation paths, with slow and frustrating responses when issues arise.

Limited scalability and enterprise experience, making it difficult to efficiently manage additional applications and evolving data retention requirements.

What a True Partner Provides

You should expect more from your vendor relationship. A strong partner:

- Communicates proactively
- Maintains consistent points of contact
- Provides support well beyond go-live
- Seeks to understand your current and long-term goals
- Explores how your archiving strategy can support future initiatives (such as those related to AI and analytics)

The partner should also provide a repeatable and scalable archiving approach that can grow with your organization over time.

What might start as a single-system archive should expand into a repeatable, enterprise-wide data management strategy, supported by standardized processes, predictable timelines, and a platform that evolves alongside your organization.

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Rethinking Common Vendor Switch Concerns

Fear of disruption is one of the most common reasons organizations hesitate to switch archiving vendors, even if a vendor switch is warranted. While that concern is understandable, the perceived difficulty of switching often outweighs the reality. In fact, switching is often faster and less disruptive than anticipated.

Concern: "We may lose data in a transition."

Experienced archiving vendors use proven extraction and validation processes to ensure data integrity throughout the migration. This includes verifying completeness across structured and unstructured data while preserving the original clinical and operational context.

Concern: "We may lose access to records during a switch."

Well-managed transitions include parallel access periods, allowing clinical and HIM workflows to continue uninterrupted. Many organizations ultimately gain better access to historical records due to improved search, usability, and EHR integration.

Concern: "Switching will take too long."

Timelines vary based on scope and complexity, but organizations often see faster progress with a new partner. Experienced vendors bring repeatable processes, predictable timelines, and the ability to execute efficiently.

Concern: "Switching may cost too much."

While there are costs associated with any transition, organizations should also consider the financial benefits associated with acting sooner. Many organizations achieve long-term savings through reduced hosting, maintenance, and administrative overhead, making the total cost of ownership lower over time.

The Cost of Staying Put

Maintaining the status quo when a vendor switch is necessary carries significant costs:

- Delayed ROI due to ongoing maintenance costs for legacy systems that remain in place (due to lack of confidence in decommissioning).
- Staff time absorbed by workarounds, manual processes, and rework.
- Limited access to historical records for clinicians and HIM teams.
- Care decisions made without full clinical context.
- Increased security risk as outdated systems stay live longer than intended.

A key factor in successful transitions is selecting a partner with specific experience in vendor-to-vendor migrations. Proven methodologies, dedicated resources, and deep experience help ensure a smoother process and a more predictable outcome.

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What to Expect During an Archiving Vendor Transition

Understanding the switch process often helps put stakeholder concerns to rest. A vendor transition should not mean restarting from zero. The most experienced vendors provide a structured handoff that builds on what has already been done and addresses gaps or issues in prior work. While the switch process varies depending on the specific situation, a strong transition often includes:

1. Discovery and Scoping

The new partner will conduct a thorough assessment of the current state, including what systems are involved, what data exists and in what condition, what integrations are in place, and where gaps or errors exist in work already completed. This will establish a clear baseline.

2. Extraction and Validation

The partner will obtain the previously archived data. Discrete data elements, documents, and images will be captured and validated for completeness and accuracy, and any data integrity issues from the prior vendor will be identified and mitigated. The most effective vendors will use automated extraction to reduce manual effort and speed implementation, while preserving native data formats and standardizing documents within the archive to ensure consistent, reliable access.

3. Migration

Validated data will be migrated into the new archive environment. For organizations switching from an existing archive, this will include migrating previously archived data so that all historical records are securely transferred within the new platform.

4. Integration Configuration

EHR integration will be configured and tested, including Single Sign-On access. Workflows for clinical access, release of information, and A/R wind-down will be set up and validated with end users before go-live.

5. Access and Go-Live

Before retiring the previous system, staff will have time to validate the new archive and confirm that all required records are available. Go-live will happen when the organization is confident in the completeness and accuracy of the data.

6. Legacy System Retirement

Once the new archive is live and validated, the legacy systems/previous archive can be decommissioned and the associated costs eliminated.

Vendor Switch Case Studies

The case studies in this report demonstrate that switching archiving vendors can be transformational. Featured organizations include:

- Parkview Health
- AltaMed
- Franciscan Health

Read the full report.

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Tips for Managing Internal Stakeholder Conversations

Even when the case for switching is clear, the internal decision-making process can be challenging. A vendor transition requires alignment across multiple stakeholders, and each group tends to come to the conversation with different priorities and concerns.

- **IT and Project Management** – This group is typically most focused on execution risk. The most effective approach here is specificity and proof. Focus on the new partner's track record for similar projects, the switch plan and process, and the safeguards that will ensure the same problems don't occur with this new partner.
- **Finance** – This team needs a clear ROI case that accounts for the cost of transition, the cost of staying, and the financial benefit of retiring legacy systems. The framing should be forward-looking. For example, share the projected cost over the next 12 to 24 months without making a transition, and the expected ROI and benefits from making a transition.
- **HIM and Clinical Leadership** – These stakeholders care deeply about access continuity. They need assurance that historical records will be available throughout the transition, that workflows will not be disrupted at go-live, and that the new archive will genuinely be easier to use than what they have now, not just different.
- **Legal and Compliance** – This group focuses closely on regulatory exposure, data security, and contractual obligations. Make sure to address the vendor's certifications, audit capabilities, and documented security posture, and provide a clear picture of how the transition will reduce compliance risk rather than introducing it.

Addressing the "We Already Invested" Objection

When this objection comes up, the most honest response is also the most practical: the question is not whether money has already been spent, but whether the current path is likely to deliver the intended outcome at an acceptable level of cost and risk. If the answer is no, continued investment does not protect the original spend. It only adds to it.

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How to Evaluate and Select the Right Vendor Partner

The right vendor combines a modern platform with proven experience successfully transitioning organizations from underperforming solutions.

Experience and Breadth

- ☐ How many software brands has the vendor worked with?
- ☐ Can they demonstrate experience with specific systems in your environment?
- ☐ Have they handled projects of similar scale and complexity, and can they provide references from comparable organizations?
- ☐ Have they successfully taken over from a prior archiving vendor?

EHR Integration Capabilities

- ☐ Does the vendor support Single Sign-On and patient context sharing with your EHR?
- ☐ Does the EHR surface indicators when legacy data exists for a patient?
- ☐ Does the integration preserve patient context (e.g., launching directly into the correct patient record without re-searching)?

Modern Platform Capabilities

- ☐ How easily can users search and retrieve data across both structured and unstructured records?
- ☐ Does the solution automate key record release processes, reducing manual effort?
- ☐ Does the solution support AI-assisted analysis and compliance flagging?
- ☐ How frequently does the vendor release meaningful product updates?
- ☐ Can A/R workflows continue post-decommissioning without relying on static exports or keeping legacy systems live?

Security and Compliance

- ☐ Is the vendor HITRUST certified, and what other relevant security certifications do they maintain?
- ☐ How is data protected in transit and at rest, and what audit logging and access controls are in place?
- ☐ How does the vendor support compliance with evolving regulatory requirements (e.g., updates to HIPAA and related frameworks)?
- ☐ What is the vendor's approach to ongoing monitoring, threat detection, and incident response?
- ☐ How does the solution reduce risk associated with legacy systems, particularly by enabling timely and secure decommissioning?
- ☐ What is their track record in supporting audit readiness and compliance across organizations similar to ours?

Independent Validation

- ☐ Has the vendor been evaluated by KLAS or another independent rating organization, and what do those scores reflect over time?
- ☐ What do peer organizations say about the vendor's performance, particularly in the post-implementation period when the sales team is no longer as involved?
- ☐ Is the vendor recognized specifically for high-complexity projects, not just standard implementations?

View the full archiving vendor evaluation guide.

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Next Steps

Harmony Healthcare IT has been ranked among the top three KLAS data archiving vendors for four consecutive years, with a performance score above 90 each year since 2021. Our team has worked with more than 500 organizations across 715+ software brands, including successfully taking over archiving programs that were not delivering as expected.

If you're evaluating your current approach and considering a change, we're available to share what we've learned and help you assess your options.

Contact Us Today

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Rev. August 2026

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