

## Electronic Medical Records

# Thinking about switching EMRs?

## *best practices to aid success*

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FOR THOSE PHYSICIANS WHO HAVE MADE THE TRANSITION FROM PAPER CHARTS TO ELECTRONIC MEDICAL RECORDS (EMRs), YOU MAY FEEL THAT YOU WILL NEVER HAVE TO GO THROUGH ANOTHER TRANSITION AGAIN.

EVERYTHING IS WORKING AS IT SHOULD, AND YOU ARE REALIZING THE MANY BENEFITS OF AN EMR.

There may come a time, however, when you choose to switch to a different EMR offering in order to gain additional functionality. Or, you may switch because you have to — perhaps your current EMR vendor has decided not to pursue validation for a new Ontario EMR Specification, or vendor consolidation has meant that your EMR will no longer be supported, thus necessitating a change to a new offering. Individual physicians may need to switch because they are leaving a practice and going to a new practice that uses a different EMR.

Whatever the situation, there are best practices to follow to facilitate your switch to a different EMR so it goes as smoothly as possible.

Switching to a different EMR presents some challenges that differ from those encountered when you first transitioned from paper to electronic records. For example, decisions such as whether to bring some or all of the historical data forward to the new EMR, addressing the loss of any familiar functionalities and how the new functions

will be used, and reworking well-honed workflows need to be addressed throughout the transition.

Beyond technical and logistical considerations is the need for change management support as your practice must contend with some disruption brought about by a replacement of the system relied upon by everyone in your organization for patient information. Engaging all members of your practice inclusively and proactively throughout the project will help ensure your success.

Our large, Ottawa-based, multidisciplinary Family Health Team of 46 physicians, 15 allied health providers and 90 staff recently completed the successful migration of 220,000 patient records — representing 600 gigabytes of data — from an EMR that had been in place for 10 years to a different funding-eligible EMR with a different user interface and database structure.

Ours was the largest instance of patient data migration to a new EMR in Canada: it took four-and-a-half months to complete from the time we

signed the contract with the new vendor. The process went well thanks to careful project planning, vendor support and change management support from OntarioMD.

While our actual migration of patient data from one system to another took about two weeks to complete, a typical practice can expect to take about a week from start to finish. During this period, your technical support and/or vendor will extract the data from the old EMR, process and transfer the encrypted data to the new vendor for import, and the new vendor will then import it into your new EMR.

In addition to these technical processes, you will need to spend time to verify that the data has been properly transferred. You do not need to shut your practice down during this period.

Once your data has been extracted from the old EMR, you will still be able to read the data on the old EMR, but will need to record any updates over the transition week so that they can be entered on the new EMR once it's ready.

## Lessons Learned

Our experience provided a number of lessons that will help in anticipating and defining the transition activities and plan *before* you begin the process, as well as best practices to follow when you switch to another EMR:

1. All the usual research involved in choosing an EMR must also be done before deciding on a new EMR. Make use of the resources available to you through OntarioMD and invest time in a careful selection process. In some cases, the best option may be to stay with your current EMR vendor and work with them to address your requirements and resolve any issues.
2. Once you have decided to switch and have chosen your preferred vendor, take the time to elaborate a clear vision of what you want the process and end result to look like. Set realistic expectations and communicate them early, preferably in writing. Validate assumptions and objectives with your internal and external stakeholders.
3. Invest significant time in developing and implementing a change management strategy — it is the most important factor for a successful project.
4. Designate a lead individual to manage the project overall and keep all parties informed and accountable on a regular basis. This individual could be an internal or external resource. OntarioMD provides project management services and access to Physician and Clinic Manager Peer Leaders who have already been through the process. This change management support can prove invaluable for your practice.
5. Identify “super users” within your practice with expertise in different areas to support users during the first week using the new EMR.
6. Assess the quality of your data. Does your current EMR contain legacy data that pre-dates the EMR Specification? Has data been entered consistently since you've been using your EMR? Is some clean-up required before the switch? Determine which data needs to be migrated and whether both the effort

and expense are worth the payoff.

7. Allow significant time for User Acceptance Testing (UAT) in order to validate the integrity of the data transferred to the new EMR. This is very important to ensure that the data is fully usable, and to position the organization to take optimal advantage of all the features in the new EMR. UAT is also an opportunity to test having multiple users on the system at the same time.
8. There is no such thing as too much training and practice before you go live with your new EMR. Schedule several sessions with each user to ensure that everyone is comfortable with the new EMR and can use it effectively from day one. Monitor user progress and provide ongoing support. Our practice conducted a “mock clinic” before we went live with the new EMR to make sure users were comfortable and the data looked and acted as it should.
9. Engage your new vendor by communicating regularly with them throughout the process — the goal is a mutually beneficial long-term partnership.

No switch to a new EMR is perfect. Our switch was complex due to the migration of large volumes of data. Data doesn't move over neatly. We prepared our data as much as we could, and our vendor was on-site on the day we went live with the new EMR to fix any problems on the spot.

A successful switch between EMRs really comes down to careful planning, effective communication, and deliberate execution. These factors are key to increasing the likelihood of success and reducing the associated complexity and disruption.

Take advantage of the resources from OntarioMD. Project Managers, Practice Advisors, Practice Management Consultants and Peer Leaders are available for advice. OntarioMD's Data Migration Guide and Transition Support Guide are also valuable tools to help you prepare and execute your plan.

Take the time to get your switch right and you will be pleased with the results. ■

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## Have a question, but don't know who to ask?

### Contact the OMA Response Centre:

A knowledge-based team who can respond to a variety of questions directly, or connect you to the person who can answer your question.

[info@oma.org](mailto:info@oma.org)  
1.800.268.7215  
(press 0)

