Electronic Medical Records

Data portability: protecting your EMR investment

by OntarioMD Practice IT Operations

DATA PORTABILITY IS A FANCY WAY OF SAYING THAT PATIENT DATA FROM YOUR ELECTRONIC MEDICAL RECORD (EMR) CAN BE MOVED TO A DIFFERENT EMR. TO DO SO REQUIRES THAT BOTH YOUR EXISTING AND NEW EMR RECOGNIZE AND TREAT YOUR PATIENT DATA THE SAME WAY. SINCE 2007, ONTARIOMD HAS REQUIRED ALL EMRS IT CERTIFIES TO MEET THE DATA PORTABILITY REQUIREMENT; THAT IS, THESE EMRS CAN MOVE OR MIGRATE ALL PATIENT RECORDS FROM ONE TO ANOTHER ELECTRONICALLY.

Why is this so important? It enables you to protect the investment in time and money that you have made in entering your patient data from paper records into your EMR. If you need to change, you can take your patient data with you. You don't lose it. You don't need to manually re-enter it. Data portability gives you the flexibility to switch vendors and EMRs whenever you decide to do so.

Consider the following situations. These are the types of changes where data portability pays real dividends:

- You are leaving a practice that uses one type of EMR and you need to bring your patient information to your new practice that uses a different EMR.
- Your EMR vendor goes out of business and you need to switch to another system.
- Your existing EMR system no longer meets your needs and you want to upgrade to a more capable system offered by another vendor.

Data portability

To become certified, OntarioMD requires that EMRs structure patient data fields in a certain way. See the table below for the elements of the Core Data Set (CDS), which is based on the Cumulative Patient Profile Categories defined by the College of Physicians and Surgeons of Ontario.

Having the capability to migrate patient data from one EMR to another is very useful, however, to do so takes time and effort for planning, preparation and the data transfer itself.

OntarioMD support

OntarioMD's Physician Peer Leaders and staff are available to provide advice and assistance in migrating patient data to different certified EMRs. If you have a pre-2007 system that uses an incompatible data field structure, you will certainly want the help of our IT specialists.

OntarioMD can also train physicians and staff on data entry procedures to ensure that your patient records are consistent, complete and reliable.

EMR Core Data Set (CDS) Elements

The CDS consists of key patient information and physician notes such as:

- Practice Management Categories
  - appointments
  - patient demographics
- Cumulative Patient Profile Categories
  - family history
  - past health
  - problem list
  - risk factors
  - allergies and adverse reactions
  - medications and treatments
  - immunizations
  - appointments
  - care elements
  - alerts and special needs
- Extended Patient Information Categories
  - laboratory tests
  - physician's clinical notes
  - reports received
    - images
    - scanned or transcribed documents received electronically

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Consistent and appropriate patient data entry

The success of any patient data migration effort depends on the source EMR patient data having been entered consistently and reliably into the appropriate Core Data Set fields.

An EMR stores specific information in specific fields. For instance, there are specific fields for immunizations. If a physician enters immunization data elsewhere, for example as a note, then that data will not go to its intended place in the Core Data Set. When it comes time to migrate that data to a new system, source data in incorrect fields will be loaded to incorrect fields in the new EMR. This can make it appear that the data was lost or that the transfer did not function properly.

An agreed approach for entering patient data and proper training for all EMR users — physicians and staff — are necessary for achieving consistent patient data within any EMR. This consistency pays off when searching for patient data and for data portability when needed in the future.

EMR Core Data Set — the key to patient record connectivity

The Core Data Set is the foundation that underpins patient record exchange within the Ontario health-care system. To communicate patient records back and forth between and among hospitals and physician offices, all the interlinked EMR systems must have compatible data configurations.

As we look into the future, the Core Data Set will facilitate other initiatives. Among these initiatives will be the ability of urgent care departments and specialists to access patient records held in the EMRs of primary care physicians.

Recap

The Core Data Set enables data portability between OntarioMD-certified EMR systems. This data portability protects the investment in time and money spent on entering the patient data. It facilitates switching between EMR vendors, and it will be the foundation for patient record connectivity. For the Core Data Set to fulfil its potential, consistent and appropriate patient data entry is paramount.

Experiences from the field: Data portability — how to do it right

An eight-doctor Family Health Organization needed to migrate its patient records to a different certified EMR when the EMR it had been using for 15 years was taken off the market. The physician IT lead said, "It took us four months of planning and preparation, but our people are very happy with the result." Here are the key elements of success:

- Identify and empower a physician IT lead to work with the new EMR vendor, preferably a vendor with patient data migration experience.
- Get to know the new EMR and understand how it organizes the patient information.
- Verify that the data in the existing EMR is correct before moving it into the new EMR.
- Have the new vendor conduct a test transfer of selected patient charts and other data.
- Work out the kinks before initiating the full data migration.
- Don't rush. This practice took two weeks to review the patient records in the existing or source EMR. The purpose was to ensure that the source data was consistently entered in the proper fields. After the data migration to the new system, the practice realized that it would have been helpful to have more time for the physicians to determine if any data was missing or had been transferred to the wrong fields.

Experiences from the field: Successfully moving 26,000 patient records from a pre-2007 legacy system to a certified EMR

An eleven-doctor Family Health Organization underwent an extensive planning and preparation phase and then successfully loaded 26,000 patient records to a new EMR over the course of one weekend. Early on, the new EMR vendor had determined that some changes would be required to make the clinical notes and the lab data from the old system compatible with the OntarioMD Core Data Set structure used in the new system. As a result, the vendor decided to carry out the data migration in two stages.

- Stage One — Clinical Notes: The vendor first reconfigured the old clinical notes to make the patient records compatible with the data structure of the new EMR system. When that was completed, the vendor then loaded the patient records, except the lab data, to the new system.
- Stage Two — Lab Data: As with the clinical notes, the vendor first converted the lab data to the Core Data Set format. Then, the vendor loaded the newly configured lab data into the new EMR.

If you have any questions on data portability or how to achieve consistent patient data entry, contact your OntarioMD practice consultant, or email emrfunding@ontariomd.com. ■