



# SWITCHING BETWEEN EMRs

## *LESSONS FROM THE FRONT LINES*

Dr. Stephen McLaren  
OntarioMD Physician Peer Leader





# Faculty/Presenter Disclosures

- Faculty: Stephen McLaren, BSc, MD, CCFP, FCFP
- Relationship with Commercial Interests:
  - OntarioMD-Peer Leader

# Disclosure of Commercial Support

- No Commercial Support
- Potential for conflict(s) of interest:
  - Stephen has received payment from OntarioMD whose product(s) are being mentioned in this program.



# Mitigating Potential Bias

- Nothing to “sell”

# Switching Between EMRs

## Outline

Why - Is it inevitable?

How - Steps and Tools

What - Data – 5 key steps to Migration

Goals – Short , Medium, Long Term

- Meet operational and patient care needs
- Insure clinic efficiency
- Prevent system “workarounds”
- Minimize disruption during transition

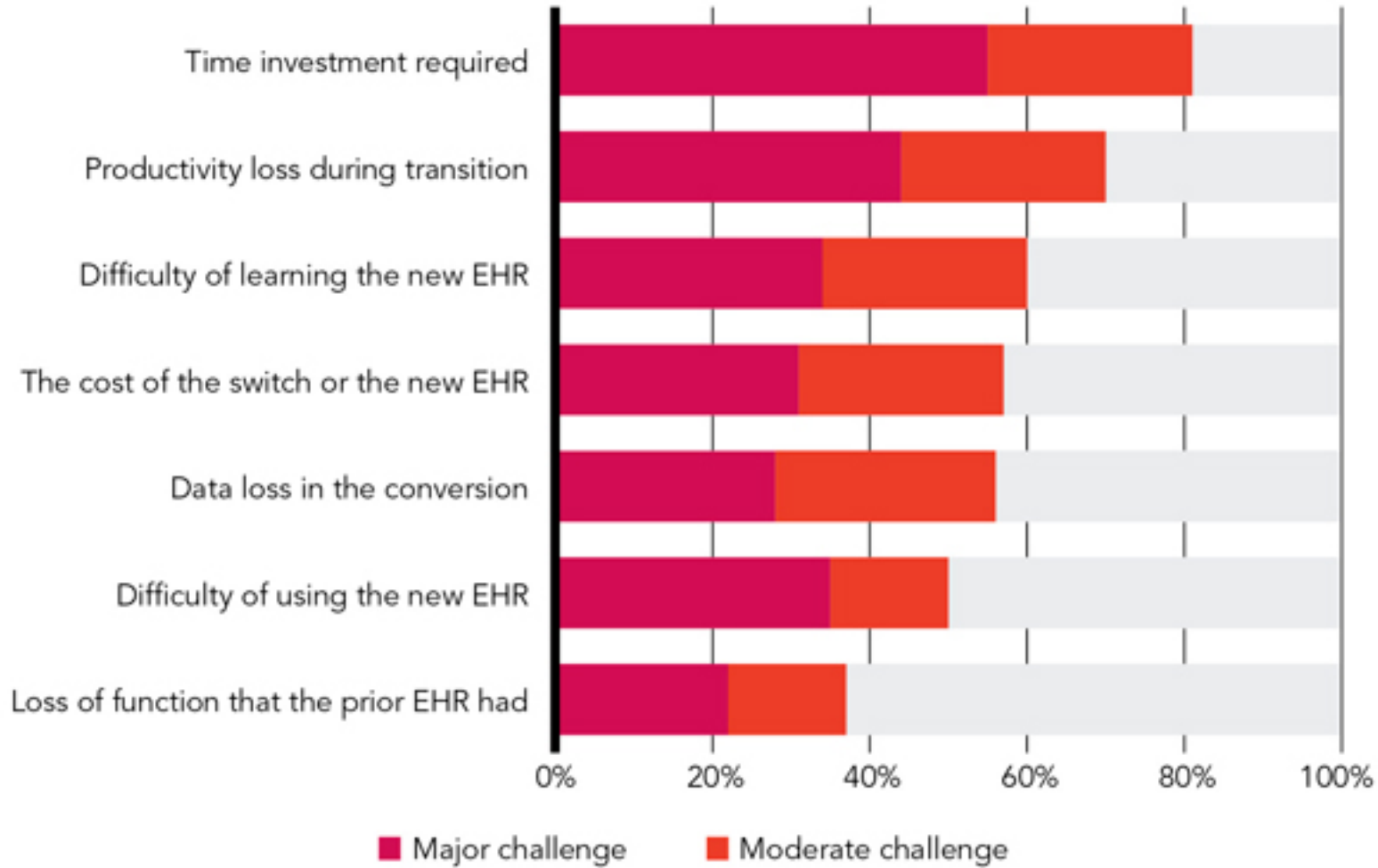
# Switching Between EMRs Is It Inevitable?

## Acquisition

The act of **acquiring** purchase of a company by strategy of buying and selling "friendly" one or a "hostile" merger or takeover accordi



# Switching Between EMRs



<https://www.aafp.org/fpm/2015/0100/p13.html> Jan-Feb 2015

# Switching Between EMRs

## Steps

- Choose a New EMR
- Data Migration
- Training / Go Live
- Tweaking & Optimization

## Steps and Tools

## Tools

- OntarioMD – Transition Support Tools
- OntarioMD – Data Migration Guide





# Switching Between EMRs

## Steps and Tools



[Sign In](#) | [Register](#)

[About Us](#) ▾

[Products and Services](#) ▾

[EMR Certification Program](#) ▾

[Resource Library](#) ▾

[Blog](#)

[Policies and Procedures](#)

[Presentations](#)

[Publications](#)

[Transition Support](#)

[Videos](#)

[Home](#) / [Resource Library](#) / [Policies and Procedures](#)

## Guidelines, Policies, and Procedures

### Privacy

- [OntarioMD Privacy Complaints and Inquiry Policy and Procedures](#)
- [OntarioMD Privacy Breach Management Policy](#)
- [OntarioMD.ca Privacy Policy](#)
- [FAQ Privacy for Physicians and Staff](#)
- [Bulletin - Ransomware threatens health care industries](#)
- [Bulletin - Keeping patient data in EMRs private](#)
- [Can You Afford a Cyber Data Breach?](#)
- [If you're online, you're at risk](#)
- [Do you need Cyber Insurance?](#)

### Data Migration

- [EMR Data Migration Project Plan](#)
- [EMR and Data Migration Guide](#)



# Switching Between EMRs

## Steps

- Choose a New EMR
- Data Migration
- Training / Go Live
- Tweaking & Optimization

## Steps and Tools

## Tools

- OntarioMD – Transition Support Tools
- OntarioMD – Data Migration Guide
- Site Visits
- Peer Support
- **Vendor “test” System**
- **Risk Assessment**



# Switching Between EMRs

## Steps

- Choose a New EMR
- Data Migration
- Training / Go Live
- Tweaking & Optimization

## Steps and Tools

## Opportunity

- HRM
- OLIS
- eConsult / Referral
- PrescribEIT
- Secure email / Portal
- Video visits
- Kiosks
- Tablets
- Interfaces with diagnostics

## Tools

- OntarioMD – Transition Support Tools
- OntarioMD – Data Migration Primer



# Switching Between EMRs

## Risk !

### Low Risk

- Same Vendor
- New platform

### Medium Risk

- New Vendor
- Co-operation and support between Old and New Vendors
- Experience in data migration

### High Risk

- New Vendor
- Limited inter-vendor co-operation
- No experience with data migration





# Switching Between EMRs

## Data Migration

Concept: The new EMR is THE “System of Record”

Data Migration Goal: Historical Data and New Data  
“behave” the same.



# Switching Between EMRs

## Data Migration – 5 Steps

### Steps

- Discovery
- Scope Definition
- Conversion Development & Testing
- Validation & Signoff
- Migration

### Theory

- Accuracy, clean, how much?
- Understand conversion methods, priorities, troubleshoot
- Sandbox environment to test, Iterative process until satisfied
- Customer signs off on the final data set.
- Vendor delivers data ready for Go-Live

### Experience

- Good, solve custom fields
- Expectations differed
- Difficult, painstaking attention to detail, "can't became can", OntarioMD assisted
- Easy as step #3 was executed well
- Oops

# Switching Between EMRs

## Data Migration – 5 Steps

### Steps

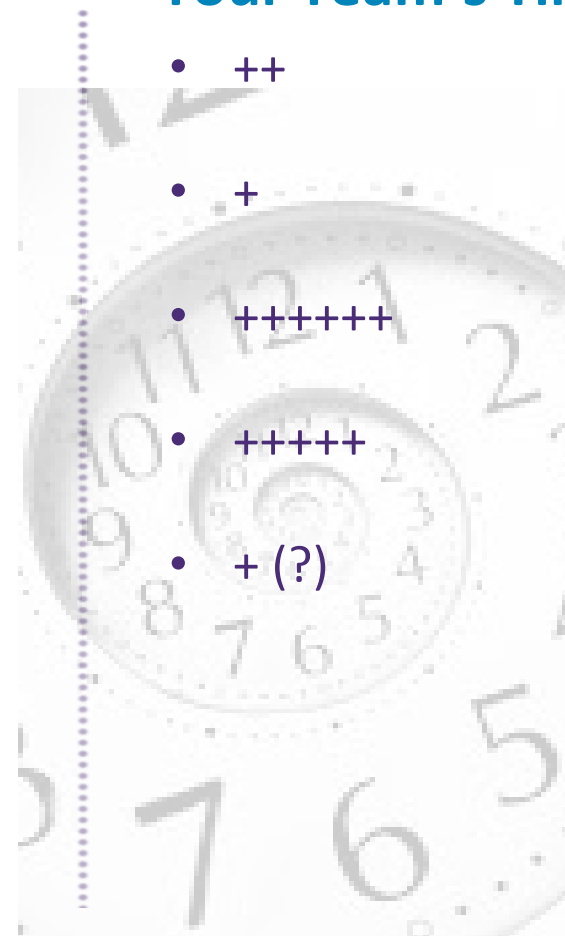
- Discovery
- Scope Definition
- Conversion Development & Testing
- Validation & Signoff
- Migration

### Responsibility

- Customer
- Customer & Vendor
- Vendor & Customer
- Customer
- Vendor

### Your Team's Time

- ++
- +
- ++++++
- +++++
- + (?)





# Switching Between EMRs

## Training and Go-Live

Choose a new EMR

Leverage your experience

Envision Workflow

Build the Go-Live environment

Lock It Down

Develop New Workflows

Train on Workflows

“Not your Old EMR”





# Switching Between EMRs

## Tweaking and Optimization

Improve on Data Migration

New features – e-booking  
e-mail  
portal  
e-consult  
integrated devices

Optimize use of integrated features

Clean data

Common “coding”

Avoid workarounds

Think ahead to the next migration



# Switching Between EMRs

## Summary

- Choose a New EMR
- **Data Migration Success**
- Training / Go Live
- Tweaking & Optimization

Risk assessment

Time required

Better operational and patient care experiences.



