



# SWITCHING BETWEEN EMRs

*LESSONS FROM THE FRONT LINES*

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# Faculty/Presenter Disclosures

Faculty: Stephen McLaren, BSc, MD, CCFP, FCFP

Relationship with Commercial Interests:  
OntarioMD Physician 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

The content of this presentation represents a self-driven practice pattern free of commercial bias or sponsorship.





## Outline:

- Why - Is it inevitable?
- How - Steps and Tools
- What - Data – 5 key steps to Migration



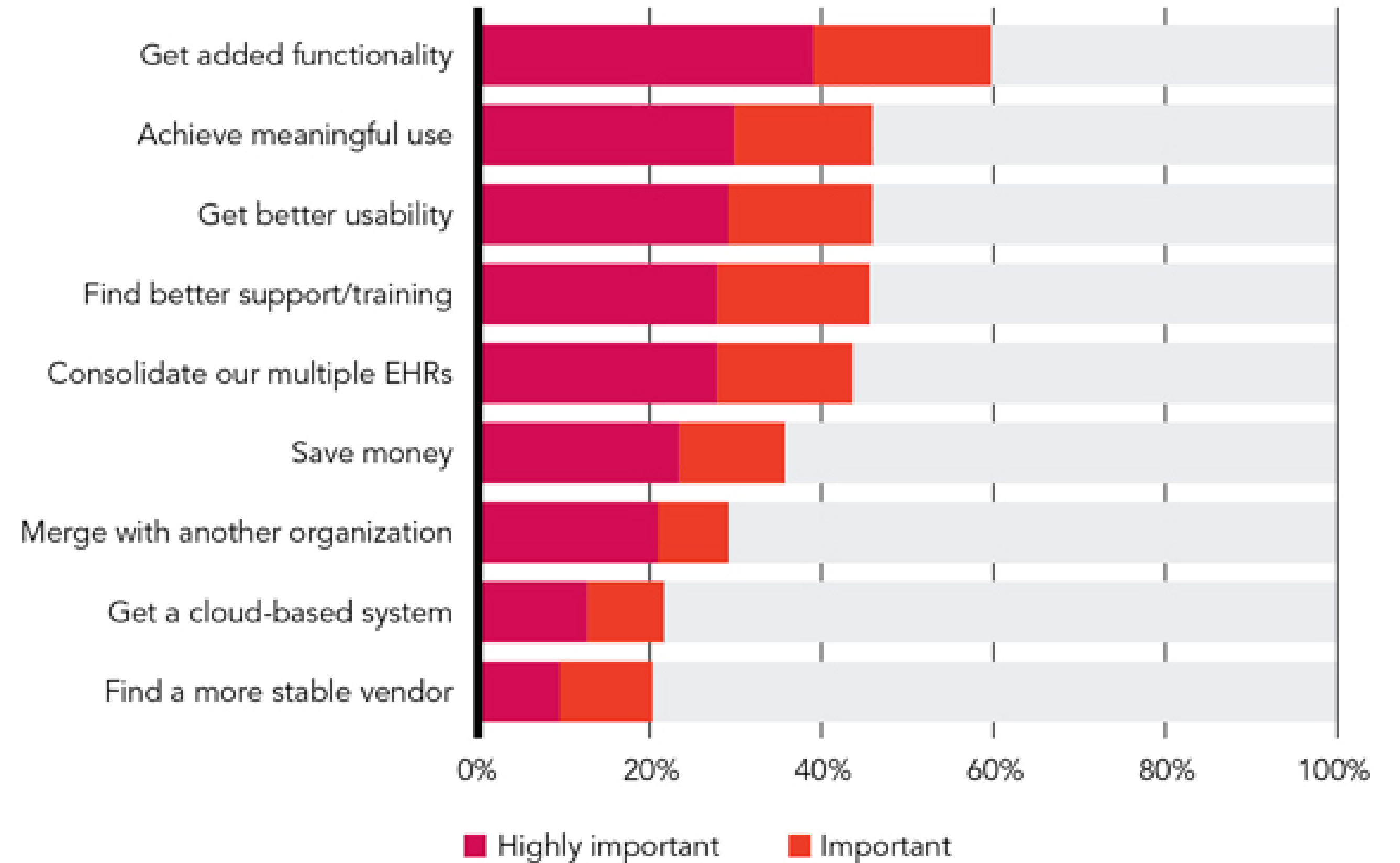
## Objective: Goals & Strategies

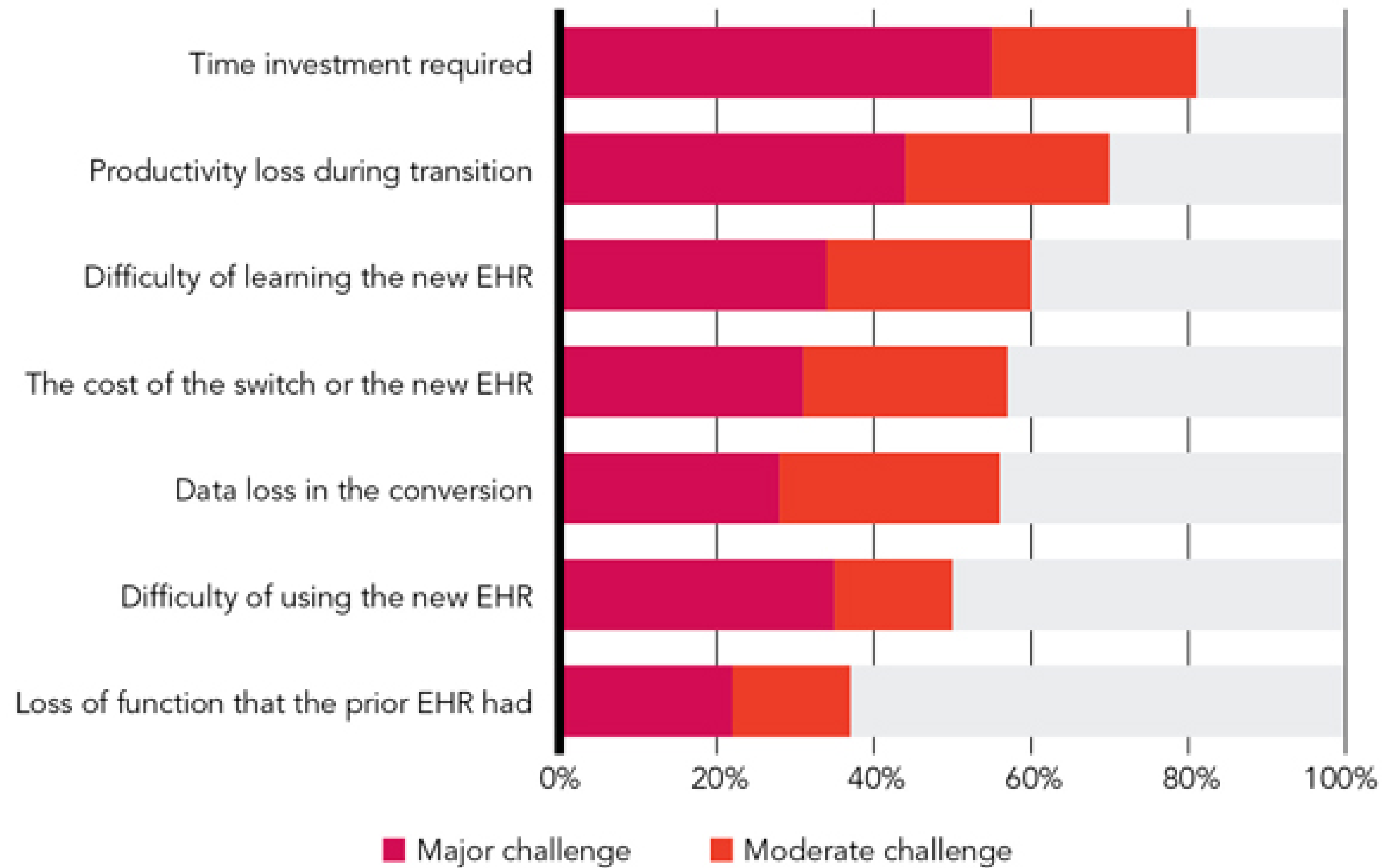


# Switching Between EMRs Is It Inevitable?

## Acquisition

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





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



## Steps

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





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- Choose a New EMR
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## Goals & Strategies

Short: Business continuity

Medium: Rapid optimization of workflows

Long: Deploy new features



## Goals & Strategies

Data - legacy and new data behave the same

Facility - you are as good,  
**or better,**  
working with the new EMR  
as compared to the old.

Short: Business continuity

Medium: Rapid optimization of workflows

Long: New features and deployment



# Steps and Tools

- Choose a New EMR
- Data Migration
- Training / Go Live
- Tweaking & Optimization
- OntarioMD – Transition Support Tools
- OntarioMD – Data Migration Guide



# Steps and Tools



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## Guidelines, Policies, and Procedures

### Privacy

- [OntarioMD Privacy Complaints and Inquiry Policy and Procedures](#)
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- [Can You Afford a Cyber Data Breach?](#)
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### Data Migration

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







# Steps and Tools

- Choose a New EMR
- Data Migration
- Training / Go Live
- Tweaking & Optimization
- OntarioMD – Transition Support Tools
- OntarioMD – Data Migration Guide
- Site Visits
- Peer Support
- **Vendor “test” System**
- **Risk Assessment**



# Steps and Tools

- Choose a New EMR
  - Data Migration
  - Training / Go Live
  - Tweaking & Optimization
- HRM
  - OLIS
  - eConsult / Referral
  - PrescribelT
  - Secure email / Portal
  - Video visits
  - Kiosks
  - Tablets
  - Interfaces with diagnostics
- OntarioMD – Transition Support Tools
  - OntarioMD – Data Migration Primer



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



## Goals & Strategies

Data - legacy and new data behave the same

Facility - you are as good ,  
**or better,**  
working with the new EMR  
as compared to the old.

*Proceedings of the National Academy Of Sciences of the USA - May 2007*

*Earlier studies found that people appear better able to remember things they have just learned if they are able to sleep soon after. In effect, they found, the brain appears to use sleep time to consolidate memories.*

*This study suggests that the process is still more complex, and that sleep helps people make inferences from bits of knowledge that may at first appear random,*

*People make minor inferences all the time without sleeping first, of course, but those connections tend to be fairly straightforward. Sleep appears to play a role in helping people make "big picture" realizations, use your conscious mind to acquire all the information you need for making a decision--but don't try to analyze the information.*

*\*\* Instead, go on holiday while your unconscious mind digests it for a day or two. \*\**





- Choose a New EMR
- Data Migration
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## Goals & Strategies

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as compared to the old.



# Risk !

## Low

- Same Vendor
- New platform

## Medium

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

## High

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

# Data Migration

## Step

## Theory

## Experience

Discovery

Clean data? How much data?

Good , solve custom fields

Scope Definition

Define deliverables, understand the methods & troubleshoot differences

Expectations were different. Contract may have assisted.

Conversion & Testing

“Sandbox” and iterative testing

Painstakingly laborious  
“Can’t” needed to become “can”  
Merci OntarioMD

Validation & Sign-off

Customer sign give the OK to migrate

Easy as step #3 was done well

Data Migration

Vendor delivers ready for Go-Live

Oops



## Data Migration – 5 Steps

- |  |                     |          |
|--|---------------------|----------|
| • Discovery                              | • Customer          | • ++     |
| • Scope Definition                       | • Customer & Vendor | • +      |
| • Conversion<br>Development &<br>Testing | • Vendor & Customer | • ++++++ |
| • Validation & Signoff                   | • Customer          | • ++++++ |
| • Migration                              | • Vendor            | • + (?)  |







## Training and Go-Live

Leverage your “holiday” and experience

Envision Workflow

Build the Go-Live  
environment

Lock It Down

Train on Workflows

“Not your Old EMR”



## 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

### Set Goals

Choose a New EMR

Data Migration Success

Training / Go Live

Tweaking & Optimization

EMR choice: Invest some time away from the office

Data Migration: A-B-C , Risk Assessment, Time

End Point: Better operational and patient care experiences.





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