# EMR Data Portability

## Switching and Merging EMR Systems

Switching or merging electronic medical record (EMR) systems can be challenging to navigate. Transferring data from one EMR to another EMR can be complex, time consuming, and sometimes costly. This quick reference guide is written for physicians and provides some best practices and approaches to increase success and reduce frustrations.

EMR vendors need to work together to find a standard that works between two systems as there are several approaches to transferring data from one EMR to another. Currently, there is no mandated provincial standard for data portability in BC[1]. There is clear recognition at the provincial level that steps must be taken to ensure data portability success between systems and efforts are underway to address this need. As this process continues, this guide will provide some items to consider before switching or merging EMR data. Much like converting data, merging data also requires early conversations regarding expectations of what the process will actually involve, the data clean-up required, and the costs and realistic timelines for this process to take place.

Physicians considering merging clinic data should fully explore options and discuss business needs before committing and ensure any data merger plans are documented and agreed to.

## Preparing for an EMR Data Transfer

Below are some suggestions for physicians to discuss with both EMR vendors. The physician should contact their existing vendor **as soon as possible** and allow ample time for the EMR vendors to prepare.

1. **Review Your Current EMR Contract or Licence Agreement:** Physicians are advised to refer to their current EMR agreements for details of service levels and vendor obligations related to data exports. Review what will be provided and any costs (exporting and/or importing) associated so you can make a decision that works best for you. Ask your EMR provider for their input in the process.

2. **Communicate with your Current & Future Vendors:** It is important to discuss the process, logistics and expectations with your current and future vendor to ensure what is possible for your data transfer. Physicians considering switching systems are encouraged to explore exactly what can, and cannot be transferred (and converted) in the new system before they commit to a new contract. Ensure that this is the understanding and EMR vendors have the capability to do so.

3. **Identify and Verify Your Expectations:** It is very important for physicians to discuss expectations around data conversion with each EMR vendor to understand the "final result" of all data elements. Your future EMR vendor can show you a test of the charts in their system which you should validate. Identify the day you want to start charting in your future EMR, and the last day you will be charting in your former EMR. These are critical dates the EMR vendors need.

4. **Data Custody & Stewardship:** Clinic level shared data governance agreements should be in place to address ownership, custody and enduring access of patient charts. This is a physician responsibility and EMR vendors will direct physicians to the CPSBC Medical Records link below.

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[1] Until 2014, the Doctors of BC/MoH relied on a master standing agreement partnership with EMR vendors in BC which included expectations around data portability and emerging standards. In the absence of any governance or regulatory agreements in place, the contractual obligations are governed between the physician and the EMR vendor contract signed.

5. **Data Cleanup Efforts:** Before data conversion can start, data integrity, accuracy and custody may need to be reviewed and/or addressed by physicians/clinic staff. Ensuring data is robust and 'clean' before conversion will help with the quality and reliability of data transferred. For more information from the College of Physicians and Surgeons see link "Medical Records" under Resources section below.

6. **Documented Plan:** It is highly recommended that physicians request a data conversion plan from their EMR vendors outlining the services and specific data provided (formats available, functionality and limitations of formats, timelines, data clean up needed before conversion, costs of data conversion, issue resolution strategies, sign off requirements, etc.).

7. **Archiving and Enduring Access:** Discuss options with your current vendor for accessing your original data, how long access available, any costs involved, and a permanent solution for storing your original data if it is needed. In a data migration, also consider requirements to maintain the integrity of the original patient record. Any data not migrated into the new EMR solution will need to be retained through alternate means to ensure the custodian is meeting the medical- legal obligations. See the CMPA Electronic Records Handbook (link below) for more guidance.

8. **Common questions to consider discussing with both current and potential vendor:**
   - What data is available for conversion and are there known data elements that will not be included in the data conversion (ex. future schedules/appointments, billing information, lab information, or specific chart information)? Will data converted be read only or usable/actionable?
   - Will all data converted at once or in phases? How long will the conversion process take?
   - Are there steps that a physician needs to take to clean up data before conversion can take place? Who will test the converted data and how much time would it take?
   - Can you still run the clinic during the transition, how can you continue to stay on top of incoming work (results, faxes) during the transition and does clinic volume need to be minimized, etc.
   - How much lead time does each EMR vendor need? During transition, will there be any time when neither system is available? How long will former EMR files be accessible?
   - What are the details/cost of training and support that will be provided during the transition?

# Resources

**Strategies underway to address data portability:** The Ministry of Health has developed an EMR Interoperability Strategy that outlines efforts needed to strengthen EMR partnerships and provincial health information standards. Doctors Technology Office has also been exploring support needs for either provincial and/or national EMR2EMR data conversion standards to support physicians and EMR vendors.

**CPSBC Medical Records:  Content, Access, Integrity, Custody/Data Stewardship & Agreements** *Who is responsible for the medical record? G*uidance is available from the College of Physicians and Surgeons of BC:
https://www.cpsbc.ca/files/pdf/PSG-Medical-Records.pdf

**CMPA Electronic Records Handbook:** https://www.cmpa-acpm.ca/static-assets/pdf/advice-and-publications/handbooks/com_electronic_records_handbook-e.pdf

**For more information, guidance or support contact:**
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