"A Click Away": How Data Archiving Can Provide Continuity Amidst Transitions

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With healthcare organizations expanding at a rapid rate, the need to migrate data as seamlessly as possible is growing. Doing so, however, comes with a host of challenges, starting with difficult decisions as to which data need to be readily accessible.

It's a challenge that's only going to increase as more organizations opt to rationalize their application portfolios, and one that's amplified by the fact that no two data migrations are alike.

"They're all extremely unique, just as your customers are," said Lisa Shubitowski, System Director of Interoperability with Hartford HealthCare, during a recent webinar. Not only do the needs of providers differ from those in other departments such as revenue cycle, but each vendor also brings a tailored approach. "We learn something new with every project," noted Shubitowski, whose team has managed 33 different migrations.

Tressa Springmann, CIO & SVP, Performance Improvement, LifeBridge Health

Hartford Healthcare isn't exactly in the minority; many organizations are experiencing the same issues, she explained during the panel discussion, which also featured Tressa Springmann, CIO and SVP of Performance Improvement with LifeBridge Health, and Jim Hammer, VP of Operations and Product Development with Harmony Healthcare IT. And yet, there is little guidance on how to navigate this tricky issue, said Springmann. "This is really hard. We need to identify processes other organizations have used in their conversion and retention strategies, and come up with rules of engagement to help inform those projects."

One strategy many organizations — including Hartford and LifeBridge — have utilized is data archiving, a process by which data is extracted from legacy systems and consolidated onto a database. It's then made accessible through a browser-based platform, which addresses one of the biggest concerns for users, according to Lisa.

It makes a huge difference, she noted, when leaders are able to "show them where the data is going to be," and reassure them they aren't losing it. "From a continuity of care perspective, you're a click away, in many cases, to the original EHR. As soon as they understand that they're not going to lose any data, the real discussions can start to happen."

Those discussions, of course, can vary quite a bit based on several factors, noted Hammer, including the specialties involved and the timeframes. But the bottom line is that "at the end of the day, everything is going to be held in the archive."

Jim Hammer, VP of Operations & Product Development, Harmony Healthcare IT

What that means, is the time and energy that had previously been spent on deciding which data to migrate can now be allotted to other critical areas of focus during a transition, such as workflow, according to Springmann. For example, when a recently acquired physician practice is converting its records onto the system EHR, "You want to make sure those clinicians have the ability to access that prior record," she said. "For us, the archival ability to view through a link that fits into the workflow, and doesn't require migrating data into the new EHR, is part of an essential transition strategy."

And although no two data archiving projects, users, or vendors are the same, there are best practices that leaders can leverage when it comes to archiving data.

- **Governance matters.** For CIOs, most of the involvement in data archiving comes in bringing governance into the process, said Springmann. As strategies are mapped out, "I need to surface and make sure the governance and purchasing and approvals occurred for an archive, and I need to make sure it's connected tightly with our security and privacy functions."

- **Fill all seats.** Another key role for CIOs is ensuring the right people are seated at the table, she added, including individuals who are "involved in these projects on a day-to-day basis," as well as an integration expert. "When we used to stand up new systems, we didn't need to have an integration expert at the table. Now we need someone who understands interoperability and what the choices are, because there is a whole other set of investments that need to be built into the capital planning exercise, and then the execution of a successful project."

- **Don't rush planning.** With so many priorities to juggle, it's understandable why some might want to jump right in, but Springmann strongly advised against it. "You can't short-circuit the planning process," she said. When putting together a budget and a team, "You need to anticipate the constraints," while also considering the fact that the data remain part of the legal record. Therefore, sufficient planning and resourcing is critical from both a risk perspective, and an organizational ownership perspective.

- **Find the right partner.** What's also critical is identifying a partner with the right talent, skillset, and health IT experience, said Hammer, and avoiding those who make unrealistic claims. "Look at references and talk to people," he advised, cautioning strongly against anyone who promises to wrap up an archiving project within a week. "The risk is getting into something and not getting the data that you really need. That would be a disaster for everybody involved." Shubitowski agreed, adding that her team chose Harmony because of the knowledge base and experience levels they demonstrated.

Once a solid partnership is established, teams can conquer the most difficult aspects of archiving, one of which is data validation. "No one has time to do that," she noted, especially when the standard is to convert three years of notes, as is the case at Hartford. "When we acquire a hospital or a physician practice that still uses a legacy system, we have to validate that the archive is going to serve us for the rest of the time we need to keep the data. To me, that's the hardest part."

As with all challenges, it's one that Harmony looks to solve without pulling in too many customer staff members. "We try to minimize that as best we can," he noted. "We like to think of ourselves as a partner and an extension of the health system." In doing so, they're able to avoid relying on downstream resources, particularly for organizations that are tight on staff, by doing things like building toolsets into the application to facilitate real-time communication back and forth between end users and the vendor.

"We lead with best practices," he said, adding that Harmony utilizes repetitive processes to ensure customers "know the drill and can expect the next steps." At the same time, he also believes it's important to recognize when it's time to veer away from the plan. "We definitely listen to our customers. We've received some incredible feedback, and we're willing to make changes."

It's a quality that IT leaders certainly value — and one that will be even more critical going forward, said Springmann. "It's an area where we can all do better job by learning from each other, but we have to get out there and have these conversations."

To view the archive of this webinar — Dismantling Risk and Realizing ROI with Data Archiving (Sponsored by Harmony Healthcare IT) — [click here](#).