



Navigating EHR Migration & Post-Go-Live Optimization

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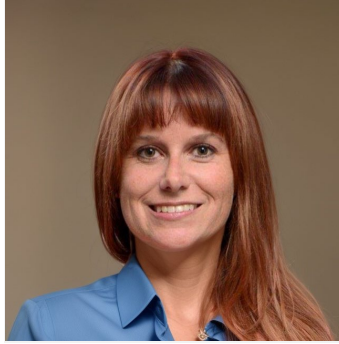
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Introductions



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Agenda

1. Potential Pitfalls of EHR Conversions
2. Preventive Measures & Strategies for Successful EHR Implementations
3. Road Map for a Solid EHR Conversion



Learning Objectives

1. Understand industry challenges of system conversions & post-implementation monitoring.
2. Learn specific tactics & strategies to employ while converting to different or newer versions of your EHR.
3. Understand system conversion preparation, go-live, & post-go-live project management.





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\$5B

combined revenue
(2023)

100+

combined countries,
territories & markets

400+

combined offices
& locations

1,800+

combined partners

40,000+

combined team members

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Conversion Time & Cost



The average cost of converting to another EHR can range from **\$10M** for a small hospital & can exceed **\$100M** for large health systems.



The average time to complete an EHR conversion can be up to **3** years.

Sources:

[Digital Health: A Framework For Healthcare Transformation](#)

[How much 13 health systems are paying for EHRs - Becker's Hospital Review | Healthcare News & Analysis](#)

01

Potential Pitfalls of EHR Conversions

In the News

Potential Impacts of EHR Implementations

Patient Safety

“The result of the transition, according to complaints on record, was an inability to reliably deliver medications, order tests, care for critically ill patients, schedule outpatients, & administer chemotherapy, along with multiple computer & printer glitches that impaired patient care.”¹

Financial Impact

Facility “cited a lengthy electronic medical record transition as a factor in its decision to file for Chapter 11 bankruptcy protection.”²

“But shortly after implementation, the hospital allegedly failed to collect \$12.6 million in bills, representing a 31% increase compared to 2015.”³

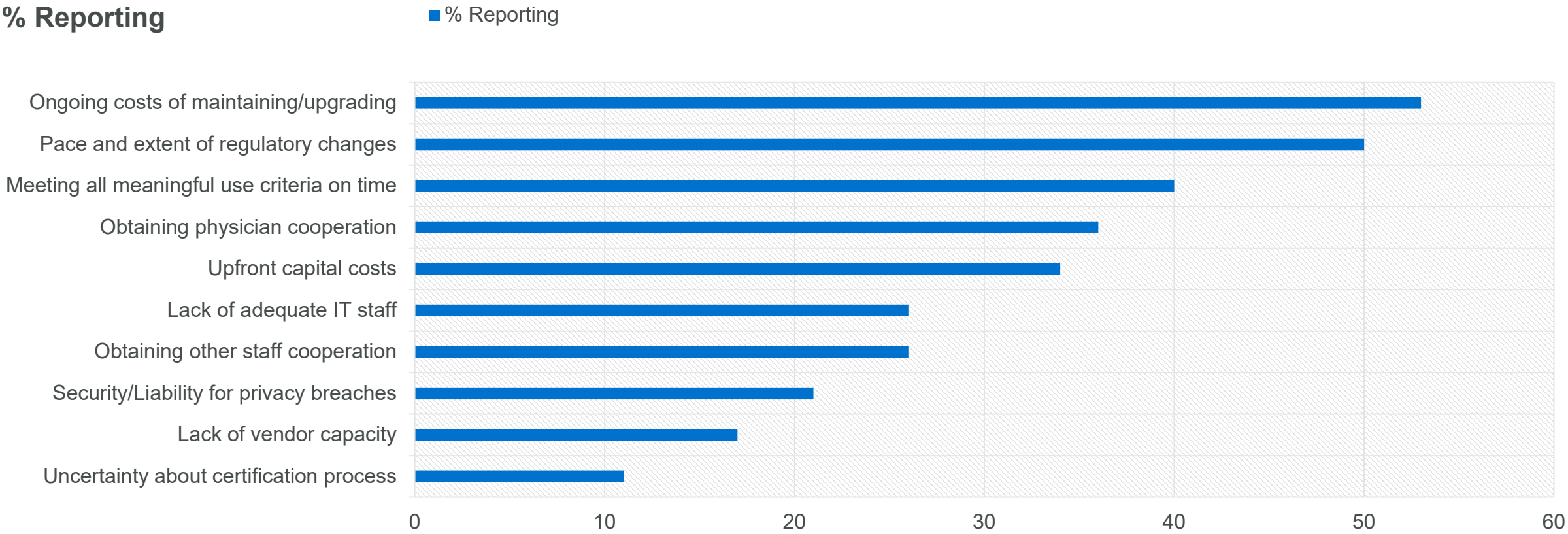
Sources:

1. "Banner's Epic to Cerner Conversion Generated Medical Errors," [healthcaredive.com](https://www.healthcarediver.com/news/2018/7/24/banner-epic-to-cerner-conversion-generated-medical-errors), July 24, 2018.
2. "EHR Implementations Pose Financial Challenges for Health Systems," [beckershospitalreview.com](https://www.beckershospitalreview.com/electronic-medical-records/ehr-implementations-pose-financial-challenges-for-health-systems), October 3, 2023.
3. "NY Hospital Settles With Cerner Over \$38M Medical Billing Problem," [techtargget.com](https://www.techtarget.com/news/360001828), March 20, 2019.

Progress, But Not Enough

Facilities still report EHR challenges.

% Reporting



Source: "Pre-Pandemic Assessment: A Decade of Progress in Electronic Health Record Adoption Among U.S. Hospitals," pubmed.ncbi.nlm.nih.gov, October 21, 2023.

Potential EHR Conversion Challenges

Lack of Engagement

- Missing key stakeholders
- Limited messaging to organization
- Undefined governance
- Resistance to change

Limited Understanding

- In a survey published by HFMA,² more than half of providers **(56%)** indicated their organizations struggled with **underutilization of available functions**
- Contingency plans not considered or outlined
- Interoperability not considered

Financial Loss

- According to survey data from the MPI Group & Medical Economics,¹ **65% of respondents** who recently implemented new EHR software reported their EHR systems led to financial losses for their practice
- Shifting deadlines & delayed go-live

1. MPI Group & Medical Economics

2. HFMA & Navigant – Top Revenue Cycle Challenges

Potential EHR Conversion Challenges



Limited Understanding of System Functionality

- Decrease in productivity
- Inefficient system validation



Staff Adaptation Challenges

- Inability to resolve or troubleshoot system issues
- Resistance to change can cause workflow disruptions

Challenges That May Lead to Financial Impact

Missing Revenue Due to Charge Capture Issues

- Lack of testing/validation of new workflows can cause decreased charge capture
- Charge capture responsibility shift

Increased Discharged Not Final Billed (DNFB) & Accounts Receivable (AR)

- System & workflow issues lead to increased resolution time
- Delayed issue identification

Denials for Timely Filing

- Resolution time for system or workflow issues outside timely filing requirements

Common Conversion Support Gaps

Standard Operating Procedures



- Current SOPs not aligned with new workflows
- Responsibilities & expectations not outlined

Staffing Accommodations



- Increased demand on staffing
- Unanticipated staffing requirements post-conversion

Key Performance Indicators (KPIs)



- Undocumented pre-conversion baseline KPIs
- Misinterpretation of new system KPIs

Case Study

Identify the Risks

Critical Access Hospital: 9-Month Implementation

- On-site regional health centers & specialty clinics
- Lab, radiology, therapy ancillary services
- Financials: 75–90 days cash on hand, baseline financial metrics included DNFB days at 17+, percentage of AR days 90+ at 20%
- Org. structure includes CEO, CFO, CNO; clinical directors supervise patient access in each area
- Client assigned IT manager as project manager

During Implementation

- EHR Vendor documents missed deadlines for client assigned data requests
- Testing or mock lives reported 60–70% success on scorecards
- Client sending Googled options for system design & demanding the changes after initial build completed
- Requests not met by vendor, leading to further lack of engagement from client
- 60% of charge master tested 4 weeks prior to go-live
- 50% of devices (scanners, printers, monitors) built & tested 2 weeks prior to go-live

Conversion Pushed

Facility pays (\$\$\$\$\$\$) due to lab
device connectivity issues



Preventive Measures & Strategies for Successful EHR Implementations

Pre-Implementation Structured Approach

Assessment



- Comprehensive risk assessment

Documentation



- Readiness benchmarks
- Workflow mapping

Objectives



- Objectives from vendor
- Expectations for vendor deliverables

During Implementation

Constant Communication & Monitoring



Timeline

- Deliverable due dates
- Key timeline testing events
- Preparation & planning



Escalation

- Regular communication with implementation team
- Escalation processes when issues arise



Committee

- Identify key resources to represent all areas of facility
- Streamline communication for system design & decisions

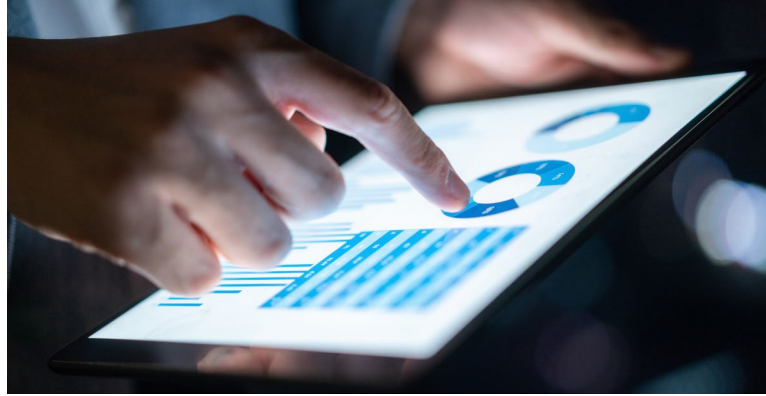
Post-Implementation

Performance Tracking & Optimization



Monitor

- Track issues & collaborate with vendor for resolutions



KPIs

- Regularly monitor KPIs to track expected time to return to baseline



Optimization

- Continuous improvement

Road Map for a Solid EHR Conversion

Overview

EHR Conversion Road Map

During Implementation

Optimization

Pre-Implementation

Post-Implementation

Pre-Implementation

- | Document
- | Assess
- | Identify
- | Plan

During Implementation

- | Track
- | Adapt
- | Train
- | Test

Post-Implementation

- | Communicate
- | Track
- | Monitor
- | Support

Optimization

- | Identify
- | Implement

Pre-Implementation

Document, Assess, Identify, Plan

Organizations should assess the viability of taking on an implementation project

Document & Clearly Define Goals



- Document key gaps & challenges with current EHR system
- Document the goals the organization hopes to achieve with the new EHR
- Prepare KPIs to compare new system performance to legacy system

Assess Current State



- Identify areas that will be improved with the new system
- Identify high-risk areas that will need close monitoring

Pre-Implementation

Document, Assess, Identify, Plan

Identify Key Roles & Expectations



- Select the project team
 - Superusers & SME in each area should be represented
- Define roles & responsibilities
- Review vendor expectations for roles
- Identify potential integration needs

Plan & Coordinate



- Raise concerns if some days or timeframes can't be met
- Keep track of key deadlines
- Determine who, what, & where are needed when
 - Review staff scheduling to allow for coverage during events & meetings

During Implementation

Track, Adapt, Train, Test

Track Milestones & Ownership



- Track completion of deliverables requested by vendor
 - Vendor documenting if deadlines are met
- Track system build completion
 - Check system for build prior to key deadlines
- Escalate missed deadlines
 - Vendor missed or facility missed

Adapt & Adjust Accordingly



- Review current state workflows & make accommodations to align with functionality in the new system
- Plan for some workflows to require additional guidance from vendor (best practices)
 - Escalate concerns with identifying new workflows
 - Invite all involved areas to the conversation (admin, clinical, revenue cycle, IT)

During Implementation

Track, Adapt, Train, Test

Train, Plan, & Create Accountability



- Include superusers/SMEs & all other staff
- Accommodate time away from duties & responsibilities to focus on training & understanding
- Provide a venue for users to voice concerns & ask questions
- Hold employees accountable for assigned training requirements
- Establish refresher sessions/communications closer to go-live

Test & Set Expectations



- Plan for vendor testing events
- Identify key workflows that need to be tested
- Document testing outcomes
 - Track progress of negative testing outcomes
 - Complete additional internal testing
 - Involve additional SMEs/end-users
 - Test new workflows
 - Retest workflows using different criteria
 - Check charges & claim generation
 - Perform go-live readiness assessment

Post-Implementation

Communicate, Track, Monitor, Support

Communicate & Escalate



- Report system & workflow issues via vendor identified process
- Conduct regular meetings to review system & workflow issues to have all impacted areas in lock-step with proposed resolution
- Establish internal issue reporting process

Track Issues & Resolutions



- Document steps needed to resolve issues
- Escalate any delays in resolution
- Escalate issues needing immediate correction
 - Use vendor's identified process
- Document impacted areas & encounters

Post-Implementation

Communicate, Track, Monitor, Support

Monitor KPIs via Dashboard



Use a dashboard to compare & monitor KPIs

- Identify workflow or system issue & escalate

KPI	Reason to Monitor
Charge Reconciliation	<ul style="list-style-type: none">• Will show charge capture compared to baseline
Discharged Not Final Billed (DNFB)	<ul style="list-style-type: none">• Will show user & system delays• Compare to legacy system baseline
Accounts Receivables (AR)	<ul style="list-style-type: none">• Will show issues with specific payers<ul style="list-style-type: none">• Can show issues with balance moving to self-pay• Will show issues with receiving payments on time• Compare to legacy system baseline
Denials	<ul style="list-style-type: none">• Will show if significant increase in denials & any trends<ul style="list-style-type: none">• Minimal increase normal

Post-Implementation

Communicate, Track, Monitor, Support

Support Structure Clearly Defined



- Timeframe vendor will support the organization
 - 3–6 months
 - Plan for internal/external support
- Communicate roles & responsibilities for superusers/SMEs
- Review & update internal issue reporting
- Update IT/EHR governance policies, adapting to the needs of the new system

Optimization

Identify, Implement

Identify Outcomes via Trackers & KPIs



- Categorize post-go-live issues & roadblocks
 - What issues are derived from inaccurate system build?
 - What workflows are causing a dip in productivity?
- Assess for system efficiencies
 - Are there areas staffing where may be shifted to better accommodate new workflows?
 - What additional software functions are available?
 - Are there opportunities to assess & alter the workflow or build to improve efficiency?

Implement Defined Scope, Prioritize



- Scope out needs; does it warrant vendor involvement?
- Plan for work effort, education, & project management.
- Which items will produce immediate relief/results?
- Align optimization items with organizational goals
- Rollout
 - Document, communicate, educate, monitor

Overview

EHR Conversion Road Map

During Implementation

Optimization

Pre-Implementation

Post-Implementation

With the right strategy & a step-by-step approach, your EHR conversion won't just be a transition—it will be a transformation.

Questions?



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