



# Maximize Provider Productivity by Avoiding EHR Transition Mistakes

A Strategic Guide for Healthcare Leaders  
of **Fast-Growing MSOs** Using **athenaOne**





# Contents

Introduction (3)

Overlooking Opportunities for Revenue Cycle Optimization (4)

Ignoring the Potential to Capture Quality Bonuses (7)

Undervaluing the Strategic Potential of Consolidated Data (8)

Inadequate Resource Planning (11)

Underestimating the Complexity of Legacy Data Formats (13)

Neglecting Destination EHR Compatibility (14)

Failing to Implement Robust Data Validation Tools (15)

Overlooking the Importance of Data Mapping (17)

Failing to Plan for Continuous Improvement (20)

Conclusion (22)

# Introduction

In today's fast-paced healthcare mergers and acquisitions (M&A) landscape, the consolidation of independent practices is accelerating at an unprecedented pace. This growth presents both opportunities and challenges for management services organizations (MSOs).



**Warren Buffett**

1989 Berkshire Hathaway  
Chairman's Letter

“**After 25 years of buying and supervising a great variety of businesses, Charlie and I have not learned how to solve difficult business problems. What we have learned is to avoid them. To the extent we have been successful, it is because we concentrated on identifying one-foot hurdles that we could step over rather than because we acquired any ability to clear seven-footers.**”

Much like Buffett's strategy of tackling manageable “one-foot hurdles,” the fastest-growing MSOs are focusing on avoiding common pitfalls that can derail transitions and turn into “seven-footers.”

As a healthcare IT leader, you're at the forefront of these transitions, ensuring the data drives strategic insights to boost provider productivity, streamline operations, and fuel long-term organizational growth.

Acquiring practices drives scalability and profitability, and the technical complexities involved—particularly in migrating the acquired entity to the enterprise's athenaOne platform—can be streamlined with effective planning and execution.

Leveraging over 15 years of experience in EHR system transitions, Aesto Health has compiled key lessons learned for MSOs. This guide highlights the top mistakes to avoid during your next transition to athenaOne, empowering you to maximize provider productivity and drive profitability with your next acquisition.

# Overlooking Opportunities for Revenue Cycle Optimization

Navigating EHR system migrations presents a significant challenge due to the inevitable "gap" in the continuity of vital patient information between decommissioning the legacy system and going live on athenaOne.

This gap can disrupt patient care and result in revenue losses during the transition. MSOs must also plan for an avenue to wind down accounts receivables (AR) data carried over from the acquired entity's legacy system.

Failure to effectively wind down legacy AR data can lead to unresolved billing issues, delayed payments, and potential revenue loss. Having a clear plan for handling AR data is important to ensure a smooth transition and minimize financial disruptions.

# Overlooking Opportunities for Revenue Cycle Optimization



## Strategies to Implement

**Leading MSOs are adopting these strategies to minimize data gap periods and revenue troughs for their acquired practices:**

- **Discontinue legacy EHR system use early.** Inform staff members about the upcoming transition to minimize reliance on the legacy EHR system, allowing your conversion partner to initiate the data extraction promptly. Additionally, an on-site server capable of extracting the database streamlines the process, eliminating reliance on the legacy EHR vendor for data.
- **Engage in “swivel-chairing,”** which involves entering data in both the legacy system and athenaOne simultaneously. This approach helps ensure accuracy and reduces the risk of double-booking appointments.
- **Prioritize Quality Assurance (QA) testing.** Conduct thorough testing of your converted data in athenaOne’s Preview environment to identify and address any issues or discrepancies before your go-live date.
- **Promptly enter face sheets for new patients seen after the initial data extraction into athenaOne as soon as you go live.** This proactive approach ensures that essential patient information is up to date in athenaOne.
- **Ensure staff members are informed and adequately trained.** Keep your staff engaged throughout the transition and provide regular updates on timelines, progress, and procedure changes. Offer training sessions and resources to familiarize staff members with athenaOne and promptly address any questions or concerns.

# Overlooking Opportunities for Revenue Cycle Optimization



## Strategies to Implement

**You will need a plan to maximize AR collections once you've finished processing claims in your legacy system. It's equally important to retain the data as part of the legacy patient record while allowing your team to focus entirely on mastering the functionality of athenaOne.**

We recommend taking the following steps:

- Determine who will manage collections for both the legacy system and athenaOne to ensure clear accountability.
- Explore revenue cycle management (RCM) opportunities with your data conversion partner. This will reduce reliance on the acquired entity's legacy EHR system and accelerate the decommissioning process.
- Choose an archive that offers essential features such as AR data access, batch payment processing, custom dunning letter generation, EOB posting, and guarantor statement generation. These capabilities are critical to preventing a prolonged revenue trough after going live on athenaOne.

# Ignoring the Potential to Capture Quality Bonuses

**MSOs often focus on the technical and operational aspects of EHR system transitions, but in doing so, they may inadvertently overlook significant opportunities for quality bonuses.**

These bonuses, often tied to performance metrics related to patient care and operational efficiency, are essential for maximizing the financial benefits of healthcare practices.

The complexity of migrating data from legacy systems to athenaOne can disrupt data continuity, affect reporting accuracy, and introduce errors that undermine the potential to capture performance-based incentives. Neglecting the potential for quality bonuses during the transition can lead to missed opportunities for substantial financial gains.



## Strategies to Implement

1. Consider using advanced data validation tools to ensure data accuracy, preventing errors that could impact bonus opportunities.
2. Ensure the acquired entity's staff receives in-depth training on athenaOne. EHR systems like athenaOne routinely update hard-coded specifications to ensure optimal reporting on quality measures. Effective training equips staff to fully leverage athenaOne for tracking performance metrics and securing quality bonuses. It also minimizes downtime for newly acquired entities, ensuring a smoother transition and continuous productivity.
3. Establish a process for routine monitoring of performance metrics. Regularly review and analyze data to identify and address any issues, ensuring that quality measures are consistently met and that the facility remains on track to achieve bonus incentives.

# Undervaluing the Strategic Potential of Consolidated Data

Healthcare data is often dispersed across multiple platforms. Consolidating healthcare data from various platforms is critical for optimizing decision-making and clinical workflows. Failure to do so can create a ripple effect across operations, impacting profitability and provider performance.

Consequences of fragmented data include:

- **Poor Decision-Making:** Fragmented data forces providers to spend more time searching for critical information, reducing the number of patients they can see in a day. Consolidated data provides valuable insights for predictive analytics, population health management, and clinical decision support.
- **Lost Revenue Opportunities:** Incomplete data can lead to missed coding opportunities and inaccurate billing, directly affecting your bottom line.
- **Compliance Risks:** Incomplete or poorly integrated data can jeopardize regulatory compliance, potentially leading to penalties or non-compliance with health information exchange (HIE) standards.

# Undervaluing the Strategic Potential of Consolidated Data



## Strategies to Implement

1. Conduct a comprehensive audit of all patient and financial data before the transition. This will ensure that no critical information is overlooked during the transition and help identify potential data gaps or inconsistencies.
2. Confirm that all relevant data is accurately transferred to athenaOne and is easily accessible.
3. Implement strategies for ongoing analysis of your acquired entity's data to foster continuous growth and boost your bottom line.

When properly consolidated, healthcare data can be leveraged as a strategic asset to:

### **Enhance Throughput**

Access to accurate and complete patient histories enables providers to deliver more personalized care and make faster, more informed decisions with data-driven insights. As a result, providers can see more patients per day, improving overall throughput while maintaining a high standard of care.

### **Optimize Profitability**

Aligned with improved throughput, quick access to complete patient histories also helps organizations achieve key financial and quality benchmarks. Organizations can significantly enhance care efficiency by reducing unnecessary treatments and minimizing patient wait times. This also enables providers to practice at the top of their licenses, allowing them to focus on high-value tasks while delegating routine duties to appropriately trained staff. The result is better resource allocation, increased productivity, and improved patient outcomes.

### **Improve Financial Planning**

A consolidated view of historical financial data empowers practices to analyze provider performance and spending trends, uncovering cost reduction opportunities and enabling accurate forecasting of future expenses. By understanding resource allocation and expenditure needs, organizations can make strategic investments that enhance efficiency and drive long-term profitability.

“ Industry leaders are feeling the pressure from labor shortages on the provider side, while increased healthcare demand following the COVID-19 pandemic is exacerbating care delivery challenges.

But there’s hope on the horizon in this challenging cost environment. Data sharing across the healthcare ecosystem presents a new opportunity for revenue to offset these cost pressures, potentially enabling stakeholders to generate value from data in unexpected ways.”



2024 Outlook: The Future  
of the Healthcare Industry

# Inadequate Resource Planning

A successful data conversion requires active participation from stakeholders at both the MSO level and the care center.

Most MSOs designate at least one individual within the organization to oversee the project and a skilled stakeholder from the care center to perform various tasks.

The MSO project lead acts as a liaison between the organization and the care center, ensuring seamless communication and coordination.

The care center stakeholder is responsible for coordinating data delivery from the legacy EHR vendor, conducting Quality Assurance (QA) testing on the data before import to athenaOne, and serving as the primary contact for both the data conversion partner and athenahealth.



## Strategies to Implement

1. Do your due diligence before selecting a data conversion partner to learn what project tasks the partner will handle versus those your organization must handle.
2. Conduct a thorough assessment of the internal resources required, including staff availability, skill sets, and current workloads. This will ensure you allocate the right personnel to the project without overburdening teams.
3. Consider selecting a data conversion partner that offers dedicated project resources. This will allow the care center to remain focused on patient care throughout the transition. By properly allocating resources, MSOs can prevent inefficiencies, maximize provider productivity, and minimize costs throughout the transition.

“ Despite being faced with escalating overhead, declining physician reimbursement, and a challenging labor market, medical groups pushed themselves to elevated levels of productivity in 2023, ensuring they could meet the increased demand for care in their communities,” said Halee Fischer-Wright, MD, MMM, FAAP, FACMPE, president and chief executive officer at MGMA.

“As physician and other staffing shortages persist, medical group leaders should embrace the latest digital technologies to assist in optimizing operations, maintaining access to care and recognizing meaningful cost savings.”



May 2024 Report: Productivity Gains  
and Rising Physician Compensation

# Underestimating the Complexity of Legacy Data Formats

Patient data can be stored in various locations, including the EHR software, radiology information systems (RIS), pharmacy management systems, and other third-party applications.

Some data formats are unique to specific EHR software, leading to compatibility issues during the transition.

Additionally, some databases require intricate methods to extract information, while others pose specific challenges related to database backup request timing and document extraction.

Overlooking these complexities can lead to incomplete or inaccurate data being imported into athenaOne, potentially disrupting provider workflows, compromising patient care, and raising operational costs due to necessary post-integration corrections.



## Strategies to Implement

1. Consider selecting a data conversion partner that thoroughly understands the intricacies of both your acquired entity's legacy system and athenaOne.
2. Consult your data conversion partner about typical database backup turnaround times for the legacy system used by your acquired entity. Experienced vendors can provide valuable insights to help you set realistic expectations and avoid delays that could disrupt operations. Keep in mind that turnaround times can range from a few days to several months.
3. Ensure the care center stakeholder initiates conversations with the legacy EHR vendor early to secure timely access to the database backup. This dialogue should include a clear understanding of what data will be included in the backup. Involving the MSO stakeholder or a subject matter expert from your data conversion partner in these discussions can help maximize clarity and ensure you get the most comprehensive support from the legacy EHR vendor.

# Neglecting Destination EHR Compatibility

**Converting healthcare data from legacy EHR systems can be highly complex due to the different formats and definitions (e.g., free text fields versus standardized SNOMED codes).**

In many cases, the legacy system data isn't directly compatible with athenaOne —like trying to fit a square peg into a round hole.

This means the acquired entity's legacy data must be properly mapped and converted to become compatible with athenaOne.

Medicare and Medicaid rely on accurate quality measures to assess whether practices are meeting their performance goals to receive reimbursement. Inaccurately mapped data leads to incomplete reports, resulting in financial penalties or lost reimbursements.



## Strategies to Implement

1. The most successful MSOs take a proactive approach, ensuring the proper resources are in place to cleanse the acquired entity's data before import to athenaOne. This ensures that the newly acquired entity is positioned to maximize reimbursement opportunities and avoid costly penalties.
2. Consider selecting a data conversion partner that understands the intricacies of your acquired entity's legacy system and athenaOne, ensuring the data is accurately converted to optimize post-integration reporting and informed decision-making.
3. Equally important, ensure your data conversion partner has a strategic relationship and regular touchpoints with key teams, including onboarding, client success, operations, and leadership. This level of collaboration drives continuous improvement, ensuring seamless communication and timely escalations for larger, more complex projects.

# Failing to Implement Robust Data Validation Tools

Your acquired facility may have millions of data points that need to be accurately mapped to the corresponding fields and specifications in athenaOne.

Relying on manual data entry or using Excel for data mapping can lead to several significant challenges that impact the quality of care.

- **Human Error:** Manual input increases the risk of mistakes, which can compromise data integrity.
- **Inconsistencies:** Lack of uniform data formats and standards.
- **Lack of Scalability:** Challenges in managing large volumes of data efficiently.
- **Data Security Risks:** Excel lacks robust security features, posing potential vulnerabilities in managing sensitive data.
- **Integration Challenges:** Aligning data with athenaOne's specific requirements can be a complex undertaking without the proper tools.

# Failing to Implement Robust Data Validation Tools



## Strategies to Implement

Top-performing MSOs are harnessing advanced data validation technology specifically designed for athenaOne transitions to streamline the process and enhance efficiency. These tools extract and analyze the legacy EHR system data, identifying which elements can be automatically converted and which require reformatting and mapping.

Benefits of these data validation tools include:

- **Automated Data Checks:** Identifying errors, inconsistencies, and missing information before import to athenaOne, ultimately reducing downtime and the data gap period.
- **Enhanced Data Accuracy:** These tools verify data against predefined standards and formats, significantly minimizing errors and streamlining workflows, ensuring the data is properly formatted for import to athenaOne.
- **Detailed Analytics:** Receive immediate insights into which data is compatible with athenaOne and which requires manual mapping intervention prior to import, thus enhancing productivity.

# Overlooking the Importance of Data Mapping

Data mapping requires clinical knowledge of how your EHR system is structured. Taking on this responsibility in-house can lead to issues impacting provider performance and overall profitability, such as:

- **Project Delays:** If data mapping takes your staff longer than expected, data will not be delivered to athenahealth on time, which could impact the availability of data in athenaOne upon your go-live date and disrupt provider workflows.
- **Increased Personnel Costs:** Taking on data mapping diverts personnel from their core responsibilities for an unspecified duration away from the forefront of patient care. If the workload becomes overwhelming, overtime costs or additional staff may be needed, leading to increased expenses.
- **Incorrect Mappings Due to Rushed Work:** The data mapping process is meticulous and demands exceptional attention to detail. Ensuring the correct mapping of relevant fields is imperative to safeguard against any negative impacts on patient care. Prioritizing precision over speed is vital to ensure a successful go-live, ultimately supporting high-quality, value-based care.

# Overlooking the Importance of Data Mapping



## Strategies to Implement

Evaluate your acquired entity's ability to handle data mapping by considering these factors:

- **Legacy EHR System Type:** Many EHR systems have poor data structure, potentially leading to more mapping work hours for your team.
- **Data Delivery Format:** The data delivery format significantly influences the workload required for transferring data to athenaOne. While most systems offer a complete database backup (e.g., a .bak file), others only provide C-CDAs or flat files (CSVs). In those cases, the data structure may impact the mapping work required.
- **Practice Type:** Some practice types pose challenges due to the unique and complex nature of the specialty and the data points they are required to chart for their patients.
- **Data Cleanliness:** The data entry method in the legacy EHR system significantly impacts the effort required to complete mapping. For example, EHR systems allowing free-text responses can result in inconsistent and unstructured data, leading to more challenging and labor-intensive mapping.
- **Volume of Patients, Providers, and Data:** The time required to complete data mapping is significantly influenced by the volume of patients, providers, data, and documents stored in the acquired practice's legacy EHR system.

Consider selecting a data conversion partner with dedicated clinically trained data mapping experts. Their expertise can save your acquired entity considerable time and resources, leading to enhanced productivity.

Additionally, specialized data mapping software simplifies this otherwise time-intensive and manual process, enabling care centers to improve efficiency. By ensuring the accurate and comprehensive transfer of legacy data, these tools enhance your acquired entity's ability to effectively use athenaOne.

“ Data mapping experts consistently achieve a first-time import success rate over **95%** that exceeds industry standards. In contrast, organizations that perform data mapping independently often see a success rate that is **25%** lower.”



**Casey Clabaugh, Aesto Health**

# Failing to Plan for Continuous Improvement

After the acquired entity is successfully onboarded with athenaOne, many MSOs fail to address improvements for their next data conversion. This oversight can have a substantial negative effect on overall enterprise performance and profitability.

MSOs, EHR partners, and data conversion partners have a unique opportunity to deliver exceptional value by creating a streamlined program management structure. By documenting and consistently refining workflows, the three entities can ensure a more efficient and effective transition.

# Failing to Plan for Continuous Improvement



## Strategies to Implement

Just like a winning football team relies on a well-designed playbook, MSOs approaching a transition to athenaOne should collaborate with their data conversion partner to create a strategic plan. A reliable data conversion partner will have a strong client success program to guide the execution of that plan.

This playbook should be revisited and refined after each conversion project to continuously improve the process, much like how football teams analyze game footage to implement lessons learned.

Each completed conversion project should undergo a review that identifies opportunities to Start, Stop, or Keep:

- **Start:** What new practices or strategies should we implement in the next project to drive more valuable outcomes?
- **Stop:** What processes should we discontinue in future projects to enhance results?
- **Keep:** What elements should we continue or emphasize more in future projects to maintain continued success?

Co-creating a playbook with your data conversion partner offers several key advantages, including:

- **Repeatable Processes:** Establish a proven framework that boosts efficiency and reduces downtime in future conversions.
- **Continuous Improvement:** Adapt strategies based on past experiences to ensure long-term success and maximize financial performance.
- **Tailored Solutions:** Customize approaches to fit the unique needs of each acquisition, optimizing workflows and enhancing provider productivity.

# Conclusion

To ensure a successful transition to athenaOne, MSOs must adopt a proactive, comprehensive strategy to address their unique challenges. By avoiding key mistakes, MSOs can significantly enhance productivity and profitability.

**Revenue Cycle Optimization:** Failing to address unresolved legacy AR data can lead to delayed payments and revenue loss. Effective AR wind down, thorough quality assurance testing, and minimizing reliance on legacy systems are essential tactics for preventing financial disruption.

**Capturing Quality Bonuses:** Quality bonuses are often overlooked during transitions but represent substantial financial opportunities. Utilizing advanced data validation tools and ensuring staff are trained on athenaOne's updated specifications are key to maximizing these incentives.

**Data Consolidation:** Fragmented data leads to poor decision-making and compliance. Proper consolidation enhances operational efficiency, profitability, and patient care by facilitating more informed and timely decisions.

**Resource Planning:** Adequate resource allocation is essential to avoiding costly delays. Planning ahead ensures that MSOs have the time, budget, and staffing necessary to handle the complexities of conversion tasks, minimizing disruptions to daily operations.

**Legacy Data Complexity:** Converting legacy data requires old and new system expertise. Selecting an experienced partner helps ensure compatibility, minimize workflow disruptions, and reduce reporting errors, thereby avoiding costly penalties and compliance issues.

# Conclusion

**Destination EHR Compatibility:** Compatibility issues between legacy systems and athenaOne often complicate conversions. By proactively converting and mapping legacy data to meet athenaOne's requirements, organizations can ensure seamless reporting, avoid financial penalties, and optimize post-transition performance.

**Data Validation and Mapping:** Advanced data validation tools and proper mapping are critical to reducing errors, improving data accuracy, and streamlining workflows. Automating these processes reduces manual effort and ensures a smoother conversion, improving provider performance.

**Continuous Improvement:** Learning from each conversion allows for streamlined processes in future projects. By developing a playbook with the data conversion partner, MSOs can establish repeatable processes, foster continuous improvement, and tailor solutions to fit each acquisition's unique needs.

By implementing the best practices in this strategic guide, MSOs can avoid common pitfalls, maximize operational efficiency, and achieve sustained financial growth and clinical success during EHR system transitions. With the right planning and strategic partnerships, these conversions become opportunities for lasting success and improved patient outcomes.