



## CASE STUDY

*This Midwestern client is a regionally integrated health care network of preventive, primary, specialty, acute care, long-term care and home care services.*

### Situation

Our client was migrating to another electronic health record system and needed to shut down its legacy system without losing ten years of critical customer support data such as registration, appointment history, charge detail, payment detail, COB visit and statement data.

Extraction requirements needed to be analyzed and translated into a working specification. Our client also requested that Crystal Reports be created to replace existing reports or generate new ones. The project had a five-week timeline.

### Our Approach

- **Requirements Discovery:** Hayes utilized the client-supplied spreadsheets that identified the required data elements from existing reports. Through research and client discussions, Hayes refined the data requirements list to ensure that customer requirements were met upon shutdown of the legacy system.
- **Analysis and Specification Creation:** As there are no “industry standard” specifications for a data extraction, Hayes created a format from scratch which ensured that no duplicate data was sent to the new SQL system. We created an HL7-based specification with a multitude of record types. We also needed to redefine the “levels” of identification for a group of invoices/payments. The largest challenge was to correctly align patient information with guarantor information as the client’s legacy system was family billing based.
- **Data Extract Creation:** Due the large volume of data, Hayes created multiple data extraction files per the specifications, which encompassed ten years’ worth of data. This data was then extracted from the legacy system to the SQL-based system on which the Crystal Reports were created.
- **Crystal Report Creation:** Hayes created the detailed Crystal Reports covering the following reporting requirements: Patient Detail, Appointment History, Guarantor Detail, Financial Comments, General Comments, Insurance Detail, Charge Detail, and Other Billing Detail. We worked directly with the client to ensure the reports’ accuracy and made additional changes on request.

### Results

The final results were extremely successful. The health system is able to shut off its legacy system completely. As it implements a new EHR across its delivery system to improve patient service, senior leaders can be assured that historical patient data is intact.

### About Hayes

Hayes works with healthcare organizations to solve mission-critical operational challenges by providing services and software solutions that improve quality and efficiency with the ultimate goal of improving the patient experience. For more information, visit [www.HayesManagement.com](http://www.HayesManagement.com) or call 617-559-0404.



### Data Extraction