

# e4health CASE STUDY

## From Legacy Systems to Epic Success: The Abstraction Strategy Behind the Smooth Transition

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### Background

Recently, one e4health customer faced a high-stakes challenge familiar to many expanding health systems: how to unify massive volumes of clinical data across multiple specialties without disrupting care delivery. With nearly 38,000 patient records spanning five distinct specialties and a tight timeline to bring the new site live on Epic, the stakes were enormous. Enter e4health. In close partnership with the customer's implementation team, we devised a clinical data abstraction strategy that minimized risk, maximized continuity of care, and ensured all essential patient data was ready before go-live.



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### What is Clinical Data Abstraction? — and Why It Matters!

Clinical data abstraction is the process of identifying, extracting, and indexing key clinical information from legacy systems or paper records into a new EHR. It ensures that providers have a clear, accurate, and comprehensive view of the patient medical record from day one. For systems transitioning to a new EHR like Epic, abstraction becomes the bridge between the past and future—critical for avoiding missed diagnoses, repeated tests, and fragmented care. At this customer, abstraction was not just a technical requirement—it was a strategic enabler of continuity, safety, and productivity across the health system.

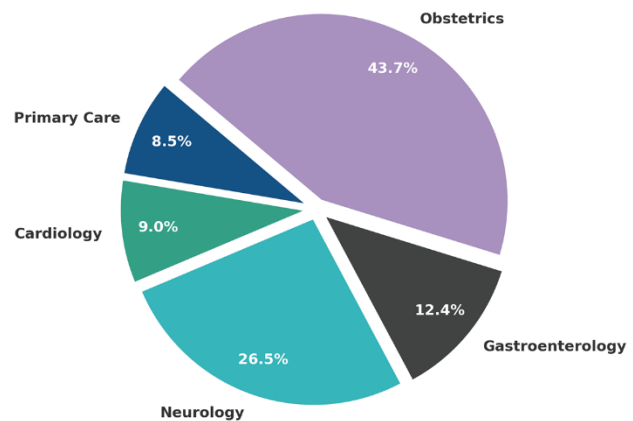
## Key Outcomes

- Total Charts Abstracted: 38,295
- Appointments Scheduled Using 'Book It!': 7,960
- Patients Created in Epic: 4,199

## Our Approach

e4health deployed a specialized team of clinical abstractors trained in Epic workflows and five different specialties—Primary Care, Cardiology, Neurology, Gastroenterology, and Obstetrics. Working in parallel streams, the team ensured that every future appointment had a fully abstracted chart before the patient walked through the door. When unexpected issues emerged—such as duplicates caused by a midstream Cerner conversion—our team quickly adapted workflows to maintain speed without sacrificing accuracy. This agile and collaborative model made it possible to support real-time patient needs, including urgent 'stat patients' requiring same-day abstraction.

Charts Abstracted by Specialty



## Tangible Benefits for the Health System

- Zero disruption to clinical workflows and patient care.
- Providers retained full access to complete charts on day one, maintaining both productivity and quality of care.
- Seamless integration with Epic, enhanced by scalable staffing for scheduling and patient creation.
- Efficient response to last-minute needs, such as daily progress reporting and same-day abstraction support.
- Flexibility to handle multiple data sources and shifting patient lists—all while staying ahead of schedule.

## Challenges Faced and How We Solved Them

### Challenge 1: Managing Multiple Patient Lists

- Solution: We processed lists simultaneously and added a 'catch-up' scheduling report to ensure completeness prior to Go Live.

### Challenge 2: Duplicate Charts from Cerner Conversion

- Solution: Developed a validation workflow to identify the correct chart for abstraction, reducing rework and confusion.

### Challenge 3: Real-Time Abstraction for Stat Patients

- Solution: Maintained a rapid-response team on standby, enabling same-day readiness for urgent visits.

## Lessons for EHR Implementations

- Clinical data abstraction should be prioritized early—before migration bottlenecks threaten timelines.
- Flexibility is non-negotiable. Abstraction teams must be equipped to adapt on the fly.
- Close collaboration between EHR leaders and abstraction teams accelerates decision-making and mitigates delays.
- Specialized abstraction staff outperform generalized labor when time, accuracy, and clinical nuance matter.

## Conclusion

By pairing expert abstraction with agile project management, e4health delivered more than a data migration—we delivered clinical continuity for thousands of patients. This customer achieved a seamless transition into Epic, thanks to a partnership grounded in expertise, flexibility, and a shared commitment to excellence. For health system executives navigating similar transitions, clinical data abstraction isn't just a checkbox—it's your foundation for success.



**For over 20 years**, e4health has served more than 400 health systems and providers nationwide by delivering world-class solutions in Health IT, HIM, Coding, Auditing & CDI. The e4health history is rooted in establishing long-standing partnerships with proven integrity and an unwavering commitment to our customers' success. In 2023 & 2024, e4health was ranked as the #1 HIM and CDI advisory and consultant firm for client satisfaction and user experience by Black Book™. We place tremendous value in our team of top tier talent across all our divisions and were pleased to be certified for the third year in a row as a "Great Place To Work™". Learn more at [e4.health](https://e4.health).



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