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EDITORIAL

ARCHIVING EPIC DATA

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Hidden Risks and Cost of Healthcare's M&A Boom: Legacy EHR Data

Conversion from one electronic health record (EHR) to another is a monumental task. Executives and project leaders must consider and manage a complex catalog of tasks - from the actual implementation of the new technology to migrating contemporary patient data and properly archiving historical medical records.

One of the most common triggers for EHR migration is a merger or acquisition. Although the pace of M&A slowed in 2025 due to uncertainty around future regulatory and reimbursement dynamics, experts anticipate activity to rebound. Key industry analysts at PWC, for example, predict a resurgence in both value and volume of healthcare deals in 2026¹. The Advisory blog expanded upon this forecast, noting that acceleration had already begun late in 2025: deal values jumped from \$7 billion in Q3 to \$22 billion in Q4. It identified mounting financial pressures as a key M&A driver for health systems, prompting greater investment interest in ambulatory service centers and regional network expansion².

An important component of any EHR migration is ensuring that legacy patient records are archived in a compliant and future-ready manner - and that authorized personnel can access the data easily and efficiently. Ensuring that an archiving workstream is incorporated with the EHR migration reduces or eliminates technical debt that can quickly accumulate with M&A activities. It is likewise critical that legacy systems be decommissioned in a timely manner to reduce cybersecurity risk and unnecessary cost.

Verisma Olah™ Data Archiving brings more than 20 years of experience to its proprietary archiving process, and securely manages and stores more than 500 million patient records for healthcare providers across the country.

Avoidable cybersecurity risks

Migration project plans typically address a conventional set of tasks:

- Managing new technology requirements and integrations;
- Modifying clinical and operational workflows;
- Migrating contemporary clinical data (e.g., allergies, medications, diagnoses);
- Reducing account receivable balances in the legacy system.

Often overlooked, however, is the importance of archiving historical clinical records and retiring the older EHR in a timely manner. "When implementing a new EHR or migrating recent acquisitions to an existing EHR platform, organizational attention and energy is often directed at the new, exciting project," said Brian Barnette, CIO Advisor for Verisma. "Limited resource capacity and implementation timeline requirements often result in legacy systems that are left running in a corner of the data center - and they unfortunately fade into the background given all the other project execution requirements."

This exposes the organization to unnecessary cybersecurity risk, as well as avoidable operational and personnel costs.

Former vice president and CIO for the Shepherd Center in Atlanta, Barnette characterized these unretired legacy EHRs as potential "silent killers."

He noted they often run on older hardware platforms, software versions or operating systems with limited availability of updates or patches. Even if these exist, information technology (IT) staff is focused on maintaining the production platforms and may neglect routine maintenance on the legacy technology.

“At the point when no new data is being added, the older systems become a lower priority from a patching and maintenance perspective,” he explained. “Bad actors are just looking for a foot in the virtual door and, if they can gain access to just one legacy system with an unpatched vulnerability, they can quickly compromise that endpoint and move laterally across the network.”

In addition, Barnette noted, these systems are consuming expensive compute, memory and storage resources – all of which contribute to overall IT costs.

To minimize these vulnerabilities, Barnette recommended that archiving medical records and retiring legacy systems be recognized as a formal phase of the project plan. “It should not just be ‘other duties as assigned’ or an item in the backlog to address after the project is completed. It should be a formal, defined work stream of the migration or implementation project with assigned resource capacity, milestones and deliverables.”

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Brian Barnette
CIO Advisor | Verisma

Expertise across EHRs

Engaging a proven archiving partner like Verisma at an early stage of EHR migration or implementation can be key, he adds. Verisma’s enterprise solution has expertly guided projects involving health care’s most highly regarded EHR vendors, including Epic, Cerner, Meditech, eClinicalWorks and NextGen.

Echoing Barnette’s advice, Michael Pittroff, Archiving Specialist for Verisma, noted it is critical for complete patient records to be stored, managed and made accessible to authorized users. “You can’t just turn off the old system and put it into the closet. You actually need those records – and you need to be able to find them.” A well-structured archive helps organizations reduce risk and costs, as well as ensure continuity of care. Likewise, it facilitates release of information requests in a timely and compliant manner.

The triggering event for any archiving project is when Verisma receives the data – via its client – from the legacy EHR. It’s important that provider organizations realize they need to begin working with EHR vendors as soon as possible to get patient records. “Archiving is about storing data, but also about ensuring regulatory compliance,” noted Carmen Griffin, Vice President of Services for Verisma data archiving. “Planning delays may introduce complexities mid-project. The safest approach is to start early and stay involved.”

Too often, Pittroff added, clients aren’t even thinking about archiving records when they’re planning an EHR implementation. “We try to get leaders to think proactively: if you are going to acquire a new hospital or practice and switch them to a different EHR, don’t forget to factor the cost and time of archiving into the project,” he said.

Problematic data delays

Interestingly, getting patient records from the legacy vendor can be one of the biggest hurdles an archiving project faces, added Griffin. Vendor delays and disruptions often derail a seamless migration. Despite legal and regulatory directives governing data access, she said, “many organizations face significant challenges obtaining data from their EHR vendors. It is an issue we frequently see across our client base.” One Verisma client waited more than a year to receive the database of patient records.

Not only do these delays extend the timeline for migration and archiving projects, they add costs. In addition to the direct cost the vendor charges for record acquisition, the provider continues to pay licensing and maintenance fees on the legacy system.

“Because of our expertise in archiving, we can help clients overcome these obstacles,” said Griffin.

Adapting to vendor requirements: Epic

Accessing clinical records and beginning the archiving process may differ depending on the EHR systems involved in the project.

When transferring records from an Epic system - whether to a different instance of Epic or another EHR vendor - one method of data transfer may be the creation of PDF documents called “exit records.” A Verisma client recently decommissioned an instance of Epic following an acquisition. During the project, the vendor supplied exit records via a single PDF for each patient.

“This represented terabytes and terabytes of data because Epic is typically used by large providers,” explained Griffin. “Each patient has its own individual PDF and those PDFs can be massive, depending on the patient's stay or history.”

Verisma moved and stored the PDF documents into its secure cloud environment - a process that typically takes three days. The PDFs were reformatted into SQL format so each data element could be accessed discretely, rendering the patient records searchable and sortable.

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Carmen Griffin
Vice President of Services | Verisma Data Archiving

Futureproofing with 'lift and shift'

The process differs when Verisma archives records from non-Epic systems, which do not rely upon PDFs. Instead, Verisma employs a "lift and shift" approach, acquiring a complete copy of the entire database and storing it in a dedicated instance of AWS (Amazon Web Services) provided exclusively for the client.

Verisma uses "lift and shift" to transfer these records, rather than the traditional ETL process (extract, transform and load). "When you're using ETL, you have to pick and choose all the different pieces of data that you want to come over. That adds a lot of time and cost," said Pittroff.

Besides being significantly faster, lift and shift essentially futureproofs the archive. "During project scoping, it's not uncommon for a client to overlook certain data elements they later realize are critical," noted Griffin. "Because Verisma retains the full database, we can make those elements visible months or even years after implementation. In contrast, ETL processes limit future access when data isn't mapped correctly at the outset."

"Imagine if a provider needs information on Jane Doe and her information is spread over multiple applications...with Verisma, staff can search every single system we've ever archived for them in one query from within the EHR. Comprehensive results will pop up in less than five seconds."

Michael Pittroff
Archiving Specialist | Verisma

Single search across legacy applications

Verisma relies on its unique and proprietary process to make archived records as usable as possible. In one Epic project, for example, Verisma was able to break out patient records originally delivered as a single PDF into multiple categories, making information easier to access within existing workflows. When clients provide a database, Verisma likewise can build report views on top of that data to support operational needs.

Perhaps even more significantly, Verisma provides access to all archived data via a single patient-centric chart. Other vendors require clients to access each individual archived application for this information.

"Imagine if a provider needs information on Jane Doe and her information is spread over multiple applications. The health information management staff has to go search each and every one of those databases separately to try to find information," said Pittroff. "How long would it take? Hours? Days? But with Verisma, staff can search every single system we've ever archived for them in one query from within the EHR. Comprehensive results will pop up in less than five seconds."

Trusted across the industry

Verisma's solution has been recognized as a market leader in data archiving in KLAS Research's 2026 Best in KLAS Report. Black Book likewise recognized the company as a top-performing vendor in Enterprise Data Archiving and Migration in 2023 and 2024. "We work very hard to make our clients happy," said Griffin. "They appreciate our approach because it accelerates implementation. This makes the project more efficient and drives customer satisfaction."

And, Pittroff added, health systems appreciate a proven process that enables them to find, manage and protect legacy information - while decommissioning older EHRs that might expose them to cybersecurity risks and cost overruns. "We ensure staff can locate critical clinical records, whether to support continuity of care or to comply with high priority release of information requests.

"We take our responsibility seriously: to serve as a trusted partner to help our customers gain access to and handle huge data sets appropriately."

(1) [pwc.com](https://www.pwc.com) (2) theadvisoryib.com

"Olah's road map is substantial, and we work closely with them in advance to align their solutions with our plans. There is strong collaboration and planning to meet our organizational needs. Additionally, Olah has strong integration with Epic. That allows users to launch Olah's solution directly within Epic's solution without needing a separate login or additional tool to access the content.

VP/Executive
KLAS, January 2026

The Verisma Difference

Recognized as the premier health information lifecycle management vendor, Verisma delivers measurable value through its data archiving solution.

- Experience with top EHRs, including Epic
- Top client satisfaction
- Expertise with archiving challenges (scope, duration, cost)
- Reduction in cybersecurity risk associated with legacy systems
- Faster with lift-and-shift vs ETL
- Future-proof data for continuity of care, compliance with ROI requests
- Single-search access to all legacy data, all archived applications
- Ability to build report views from legacy data sets

Ready to see Data Archiving
in Action?

Request a Demo