



THE ULTIMATE GUIDE

How to Move Patient Records, Clinical Workflows, and Billing From Your Existing EHR to Vozo

This guide explains how behavioral health practices can move patient records, clinical notes, appointments, and billing workflows to Vozo EHR while protecting sensitive information and minimizing disruption to daily operations.



Switching from your current behavioral health EHR to Vozo involves more than transferring patient records. Your practice needs to preserve clinical histories, maintain recurring appointments, and manage outstanding claims without disrupting patient care.

Vozo EHR supports the transition through data assessment, record mapping, validation, and go-live assistance.

This guide explains how to:

-  Prepare and transfer patient records from your existing EHR to Vozo.
-  Set up clinical documentation, scheduling, telehealth, and billing workflows.
-  Verify migrated records and maintain billing continuity.
-  Prepare your staff and practice for a successful go-live.

Who this guide is for

- Independent therapists and counselors
- Psychology and psychotherapy practices
- Psychiatry and medication-management practices
- Multi-provider behavioral health groups
- Outpatient mental health clinics
- Behavioral health practice administrators



Why Behavioral Health Practices Switch to Vozo EHR

The decision to replace an EHR usually begins with problems that affect daily clinical and administrative work.

A therapist may spend too much time completing notes. A practice administrator may be managing appointments in one system and claims in another. A growing group practice may need better coordination between clinicians, scheduling staff, and billing teams.

For behavioral health practices, several issues often contribute to an EHR replacement decision.

What Makes Behavioral Health Migration Different

Behavioral health records are not like other medical records. Moving them needs extra care.

-  Clinical Records: Keep therapy notes, psychotherapy notes, and safety plans secure.
-  Substance Use Records: Protect patient records and follow 42 CFR Part 2 rules.
-  Treatment History: Preserve diagnoses, treatment plans, and assessment scores.
-  Appointments: Keep recurring therapy sessions and telehealth appointments on track.
-  Billing and Patient Access: Maintain insurance details, payments, and patient portal access.



Vozo EHR Data Migration Framework

Phase	What happens	Typical time
Discover	Understand your practice, data and goals	3 Days
Prepare data	Export, clean and map your old data	3 Days
Build and Configure	Set up Vozo for your workflows	2 Days
Test and Verify	Check that data and workflows are correct	1 Day
Train and Go Live	Train staff, notify clients, switch over	2 Days

Note: Timing depends on practice size, data volume and the old vendor's export speed. A solo provider is often faster. A multi-location group takes longer.



Vozo 5-Phase Migration Framework

Step 1: Review Your Existing EHR and Patient Records

The first step in migrating to Vozo is understanding what your existing EHR contains and what your current vendor can export.

An EHR may store patient information across separate modules for clinical records, scheduling, documents, prescriptions, and billing.

You need a complete picture before planning the transfer.

Identify the Records Your Practice Needs

EHR Data	What to Review
Patient demographics	Names, DOB, contact details
Clinical notes	Therapy notes, evaluations, progress notes
Treatment plans	Goals, interventions, review dates
Assessments	PHQ-9, GAD-7, risk assessments
Medications	Medications, history, allergies
Appointments	Upcoming sessions, schedules, providers
Insurance	Payer details, member IDs, authorizations
Billing	Open claims, balances, payments
Consent forms	Treatment and telehealth consents



Determine Which Records Need Immediate Access

Not every historical record needs to become an editable entry in the new EHR.

Divide your records into three groups.

- **Active patient records:** Include the information needed for ongoing treatment, upcoming appointments, and current billing.
- **Inactive patient records:** Identify the records that may be needed for future appointments, billing follow-up, or clinical review.
- **Historical records:** Determine whether older documentation should be transferred into an approved document location or retained in an accessible legacy archive.

For example, a therapist may need a patient's current treatment plan, recent progress notes, and safety plan immediately, while older documentation may remain available through secure historical access.

Any decision to retain records outside Vozo must account for clinical needs and applicable retention requirements.





Request an Export From Your Existing EHR Vendor

Ask your current vendor what formats are available.

Common formats include:

- CSV or Excel for structured information
- PDF for historical clinical documents
- C-CDA for supported clinical data exchange
- Vendor-specific database or document exports

An export file is not automatically compatible with another EHR.

Confirm what Vozo can accept before requesting expensive custom exports or terminating your previous subscription.



What to Check in Your Existing Contract

Review your cancellation notice period, export fees, data ownership terms, and access to archived records.

Ask whether read-only access is available after termination.

Do not close your old EHR account until the records needed for clinical, financial, and regulatory purposes are accessible through an approved destination.



Step 2: Prepare and Transfer Your Existing EHR Data to Vozo

Once you know which records need to move, the next step is preparing the source data for the agreed migration method.

Vozo documents a patient data import feature that uses CSV or Excel templates.

Its broader migration service describes assessment, mapping, system transition, and data validation.

The method for transferring complete clinical histories or financial records must be confirmed for each practice.

Prepare Your Exported Patient Information

Before importing data, review the source files for:

- Duplicate patient entries
- Missing required fields
- Incorrect dates of birth
- Inconsistent date and phone number formats
- Invalid or incomplete patient identifiers
- Missing provider information

Keep an original copy of the approved export so that changes made during preparation can be traced.

Do not alter signed clinical notes or historical treatment information merely to simplify migration.



How to Import Patient Data Into Vozo

Vozo's published patient import procedure includes the following steps.

Step 1: Open the Data Import screen

Navigate to:

Settings → Administration → Data Import

Step 2: Download the required template

Choose the CSV or Excel template provided in the application.

Step 3: Prepare the import file

Enter the corresponding information from your previous EHR into the supplied template. Preserve the existing column headers.

Step 4: Import the file

Select Import, choose the prepared file, and submit it.

Step 5: Review the import status

Vozo displays how many records were imported successfully. If the file contains errors, the application may import valid records while reporting failures for the remaining entries.



Step 6: Review and correct errors

Use the available error details to identify records requiring correction. Before uploading corrected data, confirm how the import process handles existing records to avoid duplicates.

Example: Patient Import Verification

A practice submits 500 patient rows.

After the initial import, 480 rows are successful, and 20 require correction.

The migration team reviews the errors, corrects the affected data, and verifies the final patient count.

The practice should also check representative patient charts rather than relying only on the import status.

This is an illustrative scenario, not a reported Vozo customer result.



Step 3: Configure Your Behavioral Health Practice in Vozo

Importing patient information does not complete the transition.

Your staff must also be able to perform their daily work in Vozo.

The best approach is to configure and test the workflows your practice uses most frequently.

Set Up Providers and Appointment Types

Start with your clinicians, practice locations, roles, and working schedules.

Then configure the applicable appointment types, such as:

- Initial behavioral health evaluations
- Individual therapy sessions
- Family and couples counseling
- Group therapy
- Psychiatric medication management
- Telehealth follow-ups

Confirm how Vozo supports your required appointment durations, provider assignments, and scheduling rules.

For practices with weekly or biweekly therapy appointments, pay special attention to recurring schedules.

If those appointments cannot be imported directly from the old EHR, establish a method for recreating and verifying them.



Prepare Your Clinical Documentation

Review the templates clinicians currently use and identify the ones that must be available in Vozo before go-live.

For a counseling practice, these might include intake forms, SOAP notes, progress notes, treatment plans, and discharge summaries.

For a psychiatry practice, additional requirements may include mental status examinations, medication documentation, and psychiatric evaluations.

Vozo describes behavioral health forms and configurable clinical templates on its product pages.

The practice should verify the availability of its specific forms and any configuration requirements.

Set Up the Patient Portal and Telehealth

A new EHR may introduce a different patient portal and telehealth experience.

Before activating patient accounts, verify:

- Portal registration and login
- Access to intake forms
- Appointment information
- Telehealth visit access
- Patient messaging
- Payment functionality, where enabled



Step 4: Transition Scheduling and Billing From Your Old EHR

Two operational areas require particular attention during an EHR switch: upcoming appointments and unfinished financial transactions.

Both can remain active even after new documentation begins in Vozo.

Transfer or Recreate Upcoming Appointments

Export your upcoming appointment schedule from the previous EHR where supported.

Compare it with the schedule configured in Vozo. For each appointment, verify the correct patient, provider, date, time, visit type, and location.

Recurring therapy sessions need additional attention because one incorrect recurrence setting can affect several future appointments.

For group therapy, review group membership, attendance requirements, and documentation arrangements.

Recommended validation: Reconcile at least the next 30 days of scheduled appointments before switching. Practices with longer booking horizons should also check future recurring appointments beyond that period.

This is a suggested operational control, not a Vozo-defined minimum.



Decide What Happens to Outstanding Insurance Claims

Suppose your practice switches to Vozo while 120 insurance claims are still awaiting payment.

Some claims may already have been accepted by payers. Others may require correction, denial follow-up, or payment posting.

Those transactions need a clear owner after the switch.

Two possible arrangements are:

Option A: Complete existing claims in the old billing system
Continue managing pre-cutover claims and their associated remittances through the previous system while new encounters are billed through Vozo.

Option B: Transfer financial activity through an agreed migration process

Where technically supported, transfer designated billing records and reconcile their status in the destination system.

Neither arrangement should be assumed without confirming source-system export capabilities and Vozo's financial migration support.



Check Your Billing Configuration

Before sending live claims through Vozo, confirm the requirements for:

- Provider NPIs and billing details
- Payer identifiers
- Clearinghouse configuration
- Insurance eligibility workflows
- CPT and ICD-10-CM coding
- Electronic remittance routing
- Payment posting
- Patient balances

Behavioral health practices should test their most common service types, including therapy sessions, psychiatric evaluations, and telehealth encounters.



Step 5: Test, Verify, and Go Live With Vozo

Before switching your practice to Vozo, test the workflows that directly affect care delivery and revenue.

The goal is to identify missing records, incorrect configurations, and unresolved dependencies before they affect actual patient visits.

Run a Pilot With Representative Patient Records

Choose a small sample reflecting your practice's clinical complexity.

Include patients with:

- Ongoing individual therapy
- Multiple diagnoses
- Active treatment plans
- Medication histories
- Recurring appointments
- Applicable restricted-record requirements

Compare the migrated or retained information with the source EHR.

Clinicians should verify the clinical content, while administrative staff confirm patient identity and scheduling information.

The billing lead should separately review financial records and transaction ownership.



Test the Complete Patient Visit

Using a synthetic patient or approved test workflow, complete the following sequence:

1. Find the patient in Vozo.
2. Open the scheduled appointment.
3. Review the required clinical history.
4. Complete the appropriate documentation.
5. Sign or finalize the note.
6. Confirm the intended billing workflow.
7. Verify the encounter's final status.

For telehealth, also test the patient connection process and the clinician's documentation workflow.

Do not authorize go-live while unresolved issues threaten patient safety, critical clinical access, confidentiality, or essential financial operations.

Prepare Staff for the Switching Date

Provide role-specific training instead of requiring every employee to learn every function.

Front-desk staff should practice patient search, scheduling, check-in, portal assistance, and payments.

Clinicians should practice chart review, documentation, treatment plans, and encounter completion.

Billing staff should practice claim preparation, transaction status, payment workflows, and legacy billing responsibilities.



Plan the Final Switch

Select a go-live date after the required records and workflows have passed validation.

Determine whether any information changed in the previous EHR after the initial export.

Those changes must be reconciled using an approved final import or another documented process.

Inform patients about changes to portal access, forms, payment methods, or telehealth links.

Keep the old system accessible as required for unfinished financial activity, historical records, and retention obligations.



Ready to Switch From Your Current EHR to Vozo?

Changing your behavioral health EHR should begin with a clear understanding of your existing records, clinical workflows, appointments, and financial obligations.

With a defined migration scope and properly tested workflows, your practice can prepare for the transition while maintaining access to the information clinicians and staff need.

Vozo offers EHR migration services and a connected practice management platform for behavioral health providers.

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