

Kick off checklist

Kick off is one of the stages of migration from one clinical system to another. A full explanation of all the stages can be found in the <https://digital.nhs.uk/migrationguide>.

Using this checklist

This checklist is designed to be used alongside the online guide. You can print this checklist to edit by hand.

After downloading this checklist, it is good practice to check periodically for updates to the guide and checklist.

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Kick off

A kick off meeting is for everyone who will be involved in the migration. They discuss the end to end process of migrating between systems. The goal is to assign roles and ensure everyone knows what needs to happen and when.

Some activities happen during the kick off meeting itself. Others happen outside the meeting, as you go through the migration.

Who is involved

The people, teams or organisations who might be required in this stage of the migration are:

- project manager
- practice manager
- practice staff
- lead GP
- new clinical system supplier
- integrated care board (ICB)
- IT delivery partner (such as commissioning support unit)



Practice staff involved in Kick off

Name	Role	Kick off responsibilities	Skills or knowledge relevant to Kick off

Kick off tasks

Tasks that should be covered in the kick off include:

- agree key milestones, dates and activities
- define how to manage the migration
- identify key stakeholders
- plan for your clinical risk assessment

Agree key milestones, dates and activities

Be aware: when setting dates, make sure that any suppliers who need to be involved can also meet them.

Technical survey

Check if the practice's hardware and software is compatible with the new system

People or organisations involved:

Name	Organisation	Contact details	Survey date



Initial data production

A copy of the current system data is provided to the new supplier

People or organisations involved:

Name	Organisation	Contact details	Data production date

Initial data testing days

Check if the data is correct in the new system

People or organisations involved:

Name	Organisation	Contact details	Testing date



Final data production

The final data extract from the current supplier's system sent to the new supplier

People or organisations involved:

Name	Organisation	Contact Details	Final data production date

Cutover

Until the data transfer is complete, you will not have access to the new system. Data entered into the old system will not be transferred.

All changes during cutover should be entered into the new system after Go live.

People or organisations involved:

Name	Organisation	Contact details	Cutover date



Go live

After the data has been approved, the practice starts using the new system

People or organisations involved:

Name	Organisation	Contact Details	Go live date

Training days

Training on the new system for practice staff

Details of training days and who is providing them:

Name	Contact details	Training date



Other tasks

Book weekly migration meetings

Notes:

Block time in people's diaries

Notes:

Plan activities for quieter times and make sure everyone is available

Notes:

Book rooms for migration activities

Notes:



Reduce bookable slots during cutover

Notes:

Reduce bookable slots after go live

Notes:

Define how the migration will be managed

Create a central list of actions for each migration phase

Include:

- a provisional date for each action
- who will complete it
- the current status

Notes:

Decide who take responsibility for managing risks

Notes:

Decide on strategies to deal with risk

Notes:



Establish a process for maintaining a hazard log

Notes:

Identify scenarios that might mean you have to rollback changes

Notes:

Create a plan for how to rollback changes

Notes:

Detail any system downtime and impact on core hours

Notes:



Identify key stakeholders

Within your practice:

Name	Role

Outside your practice (for example, business change, training leads, data quality teams or ICB):

Name	Role	Organisation	Contact details



Surrounding and community services:

Name	Role	Organisation	Contact details

Current and new GP clinical system suppliers:

Name	Role	Organisation	Contact details



Third-party system suppliers (like DocMan, Apollo Scan or DispensIT):

Name	Role	Organisation	Contact details

Plan for your clinical risk assessment

Has everyone agreed the data migration plan?

Complete a clinical risk assessment

Consider any risks to clinical and patient safety.

Notes: