

# Planning for cutover checklist

Planning for cutover 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.

This checklist was last updated on 27/03/2025.



## Planning for cutover

Cutover is the time between the final data production (FDP) from the current system and go live on the new system.

Practices need to decide on a plan to reduce the impact as much as possible. At least 4 weeks before the FDP date, practices should meet with all key people involved. This meeting is to decide on processes to be followed.

During the cutover period the new supplier will import data into the new system.

Practices can continue to enter data into the current system, but you should be aware that it will not be migrated over. So, it's essential to keep a record for manual re-entry into the new system post go live.

Support for the old (legacy) system will continue for 90 days after go live. The practice will have access during this period.

## Who is involved

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

- practice manager
- practice staff
- integrated care board (ICB)
- IT delivery partner (such as commissioning support unit)
- IT lead
- current clinical system supplier
- new clinical system supplier
- third-part system suppliers
- pathology labs providers



## Preparation tasks

The things you need to do to prepare for cutover are:

- notify third parties and linked services
- backup third-party systems
- manage third-party suppliers
- export templates
- handle new registrations
- clear outstanding communication tasks
- check system logoff requirements
- manage dispensary stock (dispensing units)
- check smart cards and card readers

### Notify third parties and linked services

Ask third parties to switch off links 1 to 2 days before final production day

Organisation name	Contact details	Switch off date

## Backup third-party systems

Back up local or third-party systems or databases

System or database name	Back up date

## Manage third-party suppliers

Confirm when third-party suppliers need to disconnect from the old system and reconnect to the new one

Organisation name	Disconnect date	Reconnect date

## Export templates

Export templates from the current system and import into the new system

Template name	Export date	Import date

## Handle new registrations

**Please note: It is not advisable to list any patient details in this checklist. Any personal information recorded here may violate GDPR requirements.**

Set up method for recording new patients during cutover

Notes:

## Clear outstanding communication tasks

Clear inboxes, workflows and open communication tasks by final data production day

Notes:

## Check system log off requirements

Check if users need to log off the system before data extraction

Notes:

## Manage dispensary stock (dispensing units)

Make a plan for reducing stock leading up to cutover

Notes:



Make a plan to add new stock to the new system after go live

Notes:

## Check smart cards and card readers

Check that smart cards and card readers are up to date and working correctly

Notes:

## Tasks for managing patient records during cutover

The things you need to do to manage patient records during cutover are:

- managing appointments
- entering consultations
- recording home visits
- logging telephone calls
- prescriptions handling
- managing patient registrations
- handling pathology results
- processing referrals
- scanning documents
- redirecting screening services
- managing 111 messages and clinical correspondence
- maintaining out of hours reports
- pausing summarisation and routine data entry

### Managing appointments

Add breather slots for the first few days after go live

Notes:



Build and import rotas into the new system

Notes:

Limit bookings to 2 weeks in advance, transfer them to the new system after go live

Notes:

Reschedule chronic disease clinics that fall in the cutover period

Notes:



## Entering consultations

**Please note: It is not advisable to list any patient details in this checklist. Any personal information recorded here may violate GDPR requirements.**

Decide how to record all consultations during cutover

Notes:

Set a reminder to enter all consultations from cutover into the new system, after go live

Notes:



## Recording home visits

**Please note: It is not advisable to list any patient details in this checklist. Any personal information recorded here may violate GDPR requirements.**

Decide how to record all home visits during cutover

Notes:

Set a reminder to enter all home visits from cutover into the new system after go live

Notes:



## Logging telephone calls

**Please note: It is not advisable to list any patient details in this checklist. Any personal information recorded here may violate GDPR requirements.**

Make provision to log all calls that need updates to patient records

Notes:

Make sure that all practice staff and clinicians know what key information to record

Notes:

Set up a rota to track all calls made

Notes:



## Prescriptions handling

**Please note: It is not advisable to list any patient details in this checklist. Any personal information recorded here may violate GDPR requirements.**

Make a plan for handling prescriptions during cutover. You need to avoid using the Electronic Prescription Service (EPS) in the cutover period.

Notes:

Make a plan for how to deal with future dating prescriptions during cutover. You should avoid future dating EPS prescriptions in the cutover period.

Notes:



Tell partner pharmacies in advance to help them prepare for cutover

Pharmacy name	Contact details	Date contacted

Run reports to identify patients likely to be affected

Notes:

Make sure the last issue for six monthly prescriptions is before cutover

Notes:

Keep a detailed record of all prescription requests made during cutover

Notes:

Plan staff time for re-entering prescription data into the new system after go live

Notes:

Reduce re-entry effort using one of the following options:

**Option 1:** Issue 2 prescriptions (either post-dated or with adjusted quantities). They should cover the period from a month before cutover until a week after go live

Note: Do not post-date EPS prescriptions.

**Option 2:** Revert to issuing FP10 forms for repeat prescriptions during this period. Change the prescription method from EPS to FP10 for each patient when ordering

Notes:



## Managing patient registrations

Confirm cut off periods for registrations with your commissioner, delivery partner and new system supplier

Organisation name	Contact details	Cut off period

Disable online registrations during cutover

Notes:

Avoid new registrations in the week before cutover

Notes:



Coordinate with the current supplier to turn off GP2GP

Notes:

Decide where to keep the paperwork for new patients seen during cutover

Notes:

Set a reminder to register the new patients after go live

Notes:



## Handling pathology results

Review all your pathology results and clear all inboxes. Enter them into the current system before the final data extraction day

Notes:

Switch off links to pathology labs before the cutover starts

Notes:

Continue requesting pathology results, but ask for them on paper

Notes:

Arrange for the backlog of pathology result to be sent electronically to the new system

Notes:

Arrange for pathology labs to send results electronically after go live

Notes:

## Processing referrals

Print an extra copy of any referral made during cutover. Include the Unique Booking Reference Number (UBRN)

**Please note: It is not advisable to record details about referrals in this checklist. Any personal information recorded here may violate GDPR requirements**

Notes:

Scan the referral into the new system after go live

Notes:

## Scanning documents

Decide whether to scan during cutover for clinician access or scan after go live

Notes:

Set up a place to keep all paper documents together

Notes:



## Redirecting screening services

Stop screening services from sending electronic results before the cutover starts

Service name	Contact details	Date to stop electronic results

Set a reminder to confirm with each service to resume sending messages after go live

Notes:

Set a reminder for after go live. This is to ask Bowel screening services to resend messages from the cutover period

Notes:

## Managing 111 messages and incoming clinical correspondence

Keep all messages received during the cutover in the generic mailbox

Notes:

Set a reminder to transfer them into the new system after go live

Notes:

Decide if GPs will review paper copies or have them check the mailbox for urgent matters

Notes:



Set up a process to note down 111 messages that the current system received directly

Notes:

Set a reminder to manually enter them into the new system after go live

Notes:

## Maintaining out of hours reports

During cutover, save a copy of each 'Out of hours' report to upload into the new system post go live

Notes:

Keep a copy of any contact details for patients seen by 111 during cutover in the practice email inbox

Notes:

Set a reminder for re-entering them into the new system once it is live

Notes:

Set a reminder to make sure that the practice gets messages sent to its email inbox after go live

Notes:

Use the right code to categorise the call. Ensure messages are routed correctly in the new system

Notes:

## Pausing summarisation and routine data entry

Avoid summarisation and routine data entry during cutover. Any data entered will not transfer to the new system

Notes: