

Pre migration checklist

Pre migration 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.



Pre migration

Pre migration tasks help you to prepare, plan and organise.

In this stage, the 2 main task categories are communication and data preparation. Other pre migration tasks are the technical survey and training.

You must make sure you understand what activities to do before the migration. You also need to consider how to plan tasks around your practice's needs.

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
- integrated care board (ICB)
- IT delivery partner (such as commissioning support unit)
- NHS England Information Governance team
- IT lead
- current clinical system supplier
- new clinical system supplier
- third-party system suppliers

Communication tasks

The communication tasks that should be covered are:

- contact third parties and linked services
- tell your patients about the changes

Contact third parties and linked services

Find out when each of them will need to disconnect from the old system.

Organisation or service

SMS text messaging service providers

Organisation name	Contact details	Disconnection date



NHS app and other patient apps		
Organisation name	Contact details	Disconnection date
Patient online services		
Organisation name	Contact details	Disconnection date



Pathology labs and other providers like 111, Out of Hours or screening services		
Organisation name	Contact details	Disconnection date
Pharmacies and prescription services		
Organisation name	Contact details	Disconnection date



Primary Care Support England (PCSE)		
Service name	Contact details	Disconnection date
Third party solutions (like DocMan or Apollo Scan)		
Organisation name	Contact details	Disconnection date



Tell your patients about the changes

Tell your patients about upcoming changes

Notes:

Data preparation tasks

The data preparation tasks that should be covered are:

- clean up the current clinical system data
- request data extract from your current clinical system supplier
- request data extracts from third parties
- prepare for data checking

Clean up the current clinical system data

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

Reconciliation of patient database against PCSE database

Notes:

Map practice codes to Read or SNOMED codes

Notes:

Map unmapped drug or medication codes to the Dictionary of Medicines and Devices (dm+d)

Notes:

Identify templates that should be copied to the new system

Notes:

Identify patient records without NHS numbers and update the NHS number

Notes:

Clean up any generic patient names, like "Baby" to avoid duplication

Notes:

Run updates or patches to the current system before data migration

Notes:

Request data extract from your current clinical system supplier

Request data extract from your current system supplier

Notes:



Request data extract from third parties

Request data extract at the same time as ordering the new system

Organisation name	Data extract requested	Can they meet the date you have set?	Do you need to log out of the system before extract is taken?

Plan time for third parties to do any reconfiguration that is needed after migration

Notes:

Prepare a sample list of patients and reports for data checking

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

Gather a list of approximately 20 patient records

Notes:

Check the selected patient records are correct in the new system

Notes:

Gather a list of reports (such as QoF and target reports)

Notes:

Check the selected reports are correct in the new system

Notes: