MEDICAL AND DENTAL RESOURCE

Practice Software Migration Readiness Checklist

A vendor-neutral framework for coordinating data, infrastructure, integrations, testing and continuity during a practice software migration.

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UPDATED	3 August 2026
USE	Planning aid - not a compliance certification

How to use this resource

Work through each item with the people responsible for the process. Record evidence, an owner and a realistic due date for every gap. The online version provides related guidance and service links.

01 Establish scope and ownership

1 Name decision makers

Identify the practice sponsor, coordinator, software lead, IT lead and integration owners.

Evidence / owner / due date: _____

2 Define success

Agree included sites, users, records, templates, billing, appointments, reporting and integrations.

Evidence / owner / due date: _____

3 Confirm dates and licensing

Record notices, extraction, licensing, hosting, support and old-system access.

Evidence / owner / due date: _____

4 Use one risk register

Track decisions, dependencies, unresolved questions, due dates and owners.

Evidence / owner / due date: _____

02 Prepare the environment

1 Validate requirements

Compare supported systems, hardware, databases, browsers, peripherals and remote work.

Evidence / owner / due date: _____

2 Confirm connectivity

Assess primary internet, upload, latency, Wi-Fi, failover and vendor access.

Evidence / owner / due date: _____

3 Review identity and security

Plan individual access, MFA, administrators, support, endpoint security and logging.

Evidence / owner / due date: _____

4 Inventory integrations

Include Medicare, pathology, imaging, payments, bookings, accounting and specialist devices.

Evidence / owner / due date: _____

03 Test and stabilise

1 Test representative workflows

Use realistic reception, clinical, billing and management scenarios.

Evidence / owner / due date: _____

2 Reconcile information

Agree how records, balances, appointments and documents are validated.

Evidence / owner / due date: _____

3 Prepare rollback decisions

Define the point of no return, approved workarounds and stop authority.

Evidence / owner / due date: _____

4 Support early sessions

Arrange floor support, rapid escalation, triage, training and transition to support.

Evidence / owner / due date: _____

IMPORTANT CONTEXT

Use this alongside the current migration process supplied by the selected software vendor. Not every data field or integration can necessarily move between platforms.

Open the current online guide and related resources

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