Data Migration Checklist

For switching from paper records or a legacy system to a new PIMS.

For practices switching from paper records or a legacy system to a new PIMS. Work through these phases in order — migrations that skip the audit step tend to surface data problems months later, at the worst possible time.

Phase 1 — Audit

- ■ Inventory all existing record types (patient charts, invoices, images, lab results)
- ■ Identify records that are incomplete, duplicated, or archived offsite
- ■ Confirm what your new PIMS can and can't import directly

Phase 2 — Clean & Prepare

- ■ Standardize client and patient naming conventions
- ■ Merge duplicate client/patient records
- ■ Flag inactive clients (decide whether to migrate or archive separately)

Phase 3 — Migrate

- ■ Export data from the legacy system in the required format
- ■ Run a test import with a small sample batch first
- ■ Validate sample records against the original source

Phase 4 — Verify & Go Live

- ■ Spot-check a random sample of migrated records for accuracy
- ■ Confirm historical financial data reconciles with old system totals
- ■ Set a cutover date and freeze edits to the legacy system beforehand
- ■ Keep the legacy system accessible (read-only) for at least 90 days post-migration