

Prior to implementing your EMR, it makes sense to review and assess the state of the items and functions to which you and your vendor have agreed. This way you will both be aware of the EMR's state before you provide approval to your vendor to proceed.

Clinic Name	
Pre Go-Live Review Date	
Go-Live Date	

Hardware / Software

Item	Responsibility Vendor or Clinic	Completed or Target Date	Notes/Comments
Hardware ordering	Vendor		
Workstations			
Printers			
Multi-function printer			
Scanners			
Fax			
Others			
Hardware delivery	Vendor		
Workstations			
Printers			
Multi-function printer			
Scanners			
Fax			
Others			
Hardware installation/configuration			
Installation date(s) confirmed	Vendor		
Installer confirmed	Vendor		
Clinic closed or patient load adjusted	Clinic		
Additional software to be installed			
Office Productivity Software confirmed and ordered (if applicable)	Vendor		
E-mail solution/set-up confirmed	Vendor/Clinic		
Other software requirements confirmed and ordered (if applicable)	Clinic		
Consumables			
Labels	Clinic		
Printer Toner	Clinic		

Network / Internet / Software

Item	Responsibility	Completed or Target Date	Comments
Internet			
Site Assessment completed	Vendor		
Internet connectivity requirements confirmed	Vendor		
Internet line ordered	Vendor		
ISP Contract transferred (if applicable)	Vendor		
Installation date confirmed	Vendor/Clinic		
Network and electrical			
Network lines Installed (if applicable)	Vendor/Clinic		
Electrical outlets installed (if applicable)	Vendor/Clinic		
Legacy system access			
Access requirements identified	Vendor/Clinic		
Access solution confirmed			
Solution implementation			

Data Migration

Item	Responsibility	Completed or Target Date	Comments
Demographic Data (Alberta Health)			
Request submitted to Alberta Health	Clinic		
Confirmation obtained	Clinic		
Demographic data delivered	Clinic		
Demographic data loaded	Vendor		
Demographic data (outgoing vendor)			
Request submitted to outgoing vendor	Clinic		
Confirmation obtained	Clinic		
Demographic data delivered	Outgoing Vendor		
Demographic data loaded	Incoming Vendor		
Clinic review / Sign-off	Vendor/Clinic		
Patient Data			
Initial extract requested	Clinic		
Confirmation obtained	Clinic		
Initial extract delivered	Outgoing Vendor		
Initial extract loaded/imported	Incoming Vendor		
Initial extract reviewed/Signed-off	Incoming Vendor/Clinic		
Final extract requested	Clinic		
Confirmation obtained	Clinic		
Final extract delivered	Outgoing Vendor		
Final extract loaded/imported	Incoming Vendor		
Final import reviewed/Signed-off	Incoming Vendor/Clinic		

Physician Office System Solution

Item	Responsibility	Completed or Target Date	Comments
Alberta Health Billing			
Forms for new business account numbers completed and submitted	Vendor/Clinic		
Forms for new Submitter Prefix completed and submitted	Vendor/Clinic		
Confirmation of new business account numbers received from Alberta Health	Vendor/Clinic		
Confirmation of new Submitter Prefix received from Alberta Health	Vendor/Clinic		
Billing configuration completed	Vendor		
Workers' Compensation Board (WCB)			
WCB configuration completed	Vendor		
Electronic delivery of Labs and DI Text Reports			
Alberta Health Services (AHS) ICC eDelivery subscription form completed and submitted	Vendor/Clinic		
Confirmation received from AHS ICC	Vendor		
Custom forms			
Custom forms required for go-live identified	Clinic/Vendor		
Confirmation custom form will be available for go-live	Vendor		
Business continuity plan (BCP)			
BCP Setup/Training	Vendor		
Remote access			
Remote access requirements identified	Clinic/Vendor		
Remote access setup	Vendor		

Training

Item	Responsibility	Completed or Target Date	Comments
Workflow			
Workflow assessment completed	Vendor/Clinic		
Gaps identified	Vendor/Clinic		
Training requirements identified	Vendor		
Training			
Super user(s) identified	Clinic		
Training plan completed	Vendor		
Training date(s) confirmed	Vendor/Clinic		
Trainer(s) booked	Vendor		
Clinic closed or patient load adjusted	Clinic		
Clinic staff scheduled	Clinic		

Other

Item	Responsibility	Completed or Target Date	Comments
Privacy Impact Assessment (PIA)	Vendor/Clinic		
Vendor Sign-off on Advice (VSOS) reviewed between the vendor and the clinic	Vendor		
VSOS signed by both the vendor and the clinic; copy included in PIA submission to OIPC	Vendor/Clinic		
PIA completed and submitted to OIPC	Clinic		
Information Manager Agreement (IMA) signed with Vendor	Vendor/Clinic		
Netcare and PIN System to System	Clinic		
Provincial Organization Readiness Assessment (pORA) filed with Netcare	Clinic		
Access to Netcare Portal	Clinic		
Back-up/Back-out plan	Clinic		
Back-up and/or back-out plan identified and agreed upon	Clinic		
Post-Go-Live Service is requested by clinic from vendor if deemed necessary	Clinic		

Decision

Proceed:

Proceed with Go-Live	
Comments	

Do Not Proceed:

Revised Go-Live Date	
Comments	

Signature

[Print name] Lead Physician

Signature

[Print name] Vendor Project Manager

Signature

[Print name] Clinic Manager/Clinic Project Lead