



# M&A Data Integration

## *Readiness Checklist*



Pre-Merger  
Evaluation



Pre-Integration  
Planning



Integration and  
Testing



Post Migration  
Execution

# Pre-Merger Evaluation

Initial assessments to guide your preparations

## Assess the EHR Systems

Inventory both organizations IT systems. Do they have the same vendor? Is either system multi-tenant?

Identify data formats, storage locations and integration points

Document system capabilities and limitations.

## Evaluate Data Complexity

Determine whether legacy systems include custom fields or proprietary formats.

Determine if images, labs, or documents/forms are required.

Determine the volume of data.

## Compliance Review

Identify and address any gaps in data privacy or security protocols

Determine if you require a disaster recovery backup.

Determine if you need data "cleaned" to remove unnecessary historical files before transition.

## Stakeholder Alignment

Involve IT, clinical, and administrative leaders from both organizations.

Determine any contractual data sharing requirements.

Define goals, timelines, and success metrics for the transition.

# Pre-Integration Planning

The details and analysis to ensure seamless care

## Vendor and Contracts

Identify a vendor to support the transition and any relevant data archival.

Review contracts with EHR vendors for both organizations.

Confirm licensing, support, and transition terms.

## Gap Analysis

Identify differences in workflows, data capture, and reporting requirements.

Develop strategies to address potential misalignments.

## Data Mapping and Standardization

Create a data mapping plan to align data fields between systems.

Determine master patient identifiers if needed for matching.

Standardize key data elements like patient demographics, lab results, and clinical notes.

Determine any record retention policies that should be applied prior to transition. For example children population.

# Integration and Testing

Executing and validating the data transition

## Data Migration Planning

Determining a phased, big-bang or hybrid transition strategy.

Determine the data extraction and load methods. Do you require interface work to load? Or a EHR vendor extraction?

Plan for legacy data archival should all data not be possible to transition.

## Mock Data Migration

Identify 10 unique “golden patients” from the originating EHR system.

Perform test migration on the sample set in non-production environment.

Validate data integrity, accuracy, and usability post-migration.

## System Migration and Customization

Configure the target EHR to accommodate unique workflows or forms from the acquired hospital.

Develop templates and tools to support clinicians during the transition.

Integrate the new patient record archival system into the acquiring EHR for single sign-on access.

# Post Migration Execution

Set a foundation for success post go-live

## ■ Training and Support

Train staff on the new or updated EHR platform and if needed the new archival system.

Provide on-site support during the go-live period.

## ■ Performance Monitoring

Track system performance and user adoption metrics.

Address issues in real time to ensure operational continuity.

## ■ Compliance Auditing

Conduct post-migration audits to verify data completeness and accuracy.

Document findings and remediate any issues identified.

Get a free data transition  
assessment

Use this checklist to guide your preparation, minimize risks, and ensure a seamless transition that safeguards patient data integrity, supports clinical workflows, and positions your health system for future success.

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