## Software Upgrade Management

Product updates, upgrades, and add-ons are necessary as vendors add features or fix bugs in the system. The upgrades can be minor tweaks or patches to the system or they can be major product upgrades. Sometimes it is necessary to install a new product version or add on additional software components for regulatory requirements such as Medicare and Medicaid EHR Incentive Programs for Meaningful Use (MU) of certified EHR technology, Physician Quality Reporting System (PQRS), and ICD-10.

Update, upgrades or add-ons can be very disruptive to your organization. However, the disruption can be greatly reduced with proper planning. Use the following checklist to manage the process for software updates.

### EHR Upgrade Checklist

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| EHR Upgrade Checklist | | |
| Assess and Understand the Changes | | |
|  | | Review documentation from the vendor and/or schedule a demonstration about the upgrade to get a sense of how minor or major the changes will be |
|  | | Determine if the upgrade is required |
|  | | Assess how your organization with benefit from the upgrade |
|  | | Evaluate how the upgrade will affect your organization |
|  | | Schedule a meeting with the EHR vendor to receive a demonstration |
|  | | Ask the vendor if there is a “sandbox” where you and other members of your organization can access and experience the upgraded version of the EHR software in a test environment |
|  | | Ask about any costs associated with the software upgrade including any required or recommended new hardware components, network configuration, or on-site training |
| Plan for the Upgrade | | |
|  | Ask your EHR vendor how long the upgrade will take and if the system will be unavailable during the upgrade | |
|  | Communicate with end users about the impact and timing of the upgrades | |
|  | Schedule training sessions if needed | |
|  | Schedule a go-live date by working with your vendor to select a time that works best with patient and staff schedules | |
|  | Complete and test system backups just in case the upgrade fails and your organization needs to roll back to the latest version | |
| GO-LIVE | | |
|  | Monitor and track issues that arise during Go-Live | |
|  | Work with the vendor to resolve issues | |