IT cutover planning template

What this document is about:

When upgrading or replacing IT systems there will be a period of downtime that requires preparation. The downtime may only affect a single system and a small number of individuals, or it may affect multiple systems and numerous teams. The downtime period may be minimal or protracted depending on the extent of the upgrade or replacement and the type of system.

Cutover planning is the process of preparing for the transition from an old system, process or environment to a new one. A cutover plan ensures a smooth and controlled switch with minimal disruption to business operations. Cutover planning is critical to manage the risks of the downtime period, this includes the lead in time and the post-downtime periods. Because downtimes and cutovers are specific to the type of system and extent of changes there is no 'one size fits all' plan, this SHOT SCRIPT template aims to provide a template that can be tailored to the specific needs of the organisation.

Key aspects of cutover planning:

The following aspects will need to be considered as part of cutover planning:

- Definition of scope: Identifying what will change including systems, data and processes
- Roles and responsibilities: Assigning tasks to stakeholders, including IT teams, users and those who are likely to be impacted: clinical or laboratory
- Pre-cutover activities: Preparing for the transition, data migration, testing, user training
- Cutover execution plan: Defining the sequence of steps to follow during the transition, including backups, validation and contingency measures
- Risk management and contingency plans: Identifying potential risks and mitigations if issues arise
- Post cutover validation: Verifying system stability, testing integrations and ensuring business continuity

Please note that this IT cutover planning template is provided as a general framework for planning and executing system transitions. It should be customised based on specific requirements, risks and operational constraints of your organisation. The template does not guarantee successful implementation and should not replace thorough project management, technical validation or risk assessment. Organisations are responsible for conducting their own due diligence, testing and contingency planning. This provides a useful template, and users are encouraged to modify it as necessary to align with your project needs, operational policies and governance requirements.

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Action to be taken during lead in time or post downtime	Task details	Duration of task	Start date	Action by (e.g., IT team, laboratory team (named individual)	Comments	Date completed
Lead in time action	Proposal, risk assessment and contingency plans approved by relevant forum (e.g., operations board, emergency preparedness committee). NOTE: this needs to be completed well in advance for downtime periods. All relevant stakeholders must be informed and be prepared for the downtime particularly in high blood use areas					
Lead in time action	Create and agree change notification document (e.g., email, letter) including contingency plans					
Lead in time action	Consider all staff likely to be impacted by this downtime and review staffing arrangements needed for the cutover. For e.g., if there is a need to change routine staffing arrangements					

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IT cutover planning template

Action to be taken during lead in time or post downtime	Task details	Duration of task	Start date	Action by (e.g., IT team, laboratory team (named individual)	Comments	Date completed
	such as having an extra person covering nights.					
Lead in time action	Notify relevant staff of the proposed downtime					
Lead in time action	Confirm downtime processes are in place and staff clear on contingency plans including potential need for extra support for staff especially during OOH/lone working hours					
Lead in time action	Preparation of IT servers					
Lead in time action	Confirmation that validation has been completed and approved					
Lead in time action	Check no ongoing or imminent emergency cases in the laboratory					
Lead in time action	'Go - no go' discussion point					

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Action to be taken during lead in time or post downtime	Task details	Duration of task	Start date	Action by (e.g., IT team, laboratory team (named individual)	Comments	Date completed
Lead in time action	Notify relevant staff/users of start of downtime					
Lead in time action	Ensure timely communication to clinical staff regarding downtime					
Lead in time action	Laboratory actions (e.g., if affecting EBMS - retrieval of blood units from blood fridges, managing emergency group O stocks)					
Lead in time action	Generate downtime reports if available or create manual records (e.g., outstanding results in outgoing LIMS)					
Lead in time action	Stop relevant interfaces					
Lead in time action	Perform back-up of system database on server					
Lead in time action	Disconnect users					
During downtime action	Perform upgrade/replacement					

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Action to be taken during lead in time or post downtime	Task details	Duration of task	Start date	Action by (e.g., IT team, laboratory team (named individual)	Comments	Date completed
During downtime action	Supplier validation to confirm successful upgrade/replacement					
Post downtime action	User validation to confirm acceptable functionality (e.g., critical function testing) in production system					
Post downtime action	Connect/reopen interfaces, confirm with test messages in production system					
Post downtime action	Confirm that all relevant devices are accessing the new/upgraded system					
Post downtime action	Notify users that the system is ready for use					
Post downtime action	Communicate to clinical teams					
Post downtime action	Identify all blood components/products released and tests performed during the downtime period using contingency methods					

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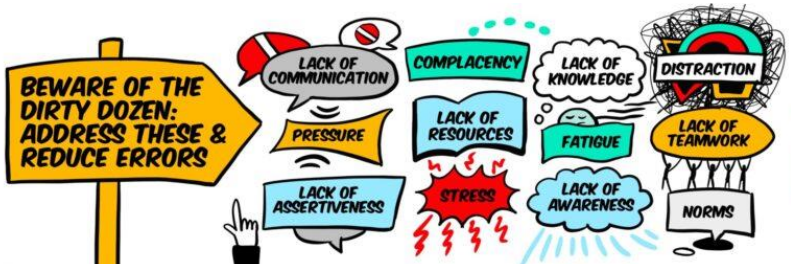
Action to be taken during lead in time or post downtime	Task details	Duration of task	Start date	Action by (e.g., IT team, laboratory team (named individual)	Comments	Date completed
	(This is to facilitate retrospective addition of the details to IT system, and account for all components/products released)					
Post downtime action	Update relevant systems with manual downtime data including traceability					
Post downtime action	Scan downtime records and upload to relevant IT system					
Post downtime action	Review cutover plans and final sign-off					
Post downtime action	Document and review lessons learnt, and feedback received about issues (if any) encountered in the live system post-update					



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