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**PRIOR INFORMATION NOTICE**

**For** **EPR Programme -**

**Data Migration Partner**

**Ref: C251353**

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# PURPOSE

## Norfolk and Waveney Acute Hospital Collaboration (NWAHC) is looking for a Data Migration partner to help lead the data migration workstream within the EPR Programme, whose preferred supplier is Meditech Expanse. This is a major change and transformation Programme spanning three hospitals across Norfolk. The intention is to go live with Meditech Expanse in late 2025/26.

# scope of requirement

## NWAHC will be looking for highly experienced support with the planning, analysis and implementation of the data migration and conversion requirements within the EPR Programme as part of the journey towards implementing Meditech Expanse. They will prepare a technical plan for data extraction and estimate of transformation effort for the base systems. Requirements and associated data sets required when mapped to the related Meditech Expanse IFF and associated import mechanism. The plan will include:

### A full analysis of all systems and proposal for management of each type of activity type and IFF.

### The detailed data types are set out in below under Requirements but the data migration partner must have experience of working with Meditech or another major EPR vendor, specifically around the high-risk administrative pathway’s areas.

### PAS MPI data – there are three separate PAS systems but there is currently a programme to ensure there is a single unique patient identifier however this is only based on known matches so there will need to be an on-going piece of work that will look to reduce the number of query matches.

### Referral to Treatment (RTT), Non RTT, Diagnostic and Cancer pathways and associated periods – suppliers need to express their experience and credibility with case studies about how they have successfully supported NHS Trusts to migrate and convert RTT, Non RTT, diagnostic and cancer pathways and evidence how they have integrated all relevant periods into one overarching pathway and to include methodology for creating a unique pathway identifier which all relevant activity can be linked back to.

### Specific outputs within defined timescales and responsibilities split between the trusts, collaborative and data migration partner.

### The supplier will work with NWAHC to deliver the data migration plan in line with the overall Meditech Expanse implementation plan including:

## Migration of data into Meditech Expanse

## The scope of migrated data (i.e. IFFs to be populated and volumes of data to be included) including details of any data items that need to be excluded from the migration scope.

## The tools to be used to generate each IFF.

## All the source systems containing data to be migrated to the target system.

## The number and full scope of each trial load (i.e., considering dependencies on configuration / mapping activity and environment availability).

## Frequency / approach for importing source data into Meditech Expanse.

## Load errors / warnings.

## Data quality and source data validation

## The approach(es) to be taken to resolve the following (potential) data issues:

## Missing ‘mandatory’ data items (i.e., where there is no available source data, but the field is required within the supplier IFF)

## Anticipated Data Quality / Data Integrity issues within the source data

## Approach for managing duplicate patients (including the matching criteria and approach for identifying ‘near’ duplicates) and the management of physical notes following automated merges through the Transform and Load processes.

## Approach to core issues such as Patient Numbering (i.e., defining what common numbering will be carried through into the target system and an assessment of the impacts on other teams e.g., Medical Records / Integration / 3rd Party Systems)

## Transformation rules and data mapping

## Cutover planning including anticipated ‘downtime’ during final cutover / go-live

## Manual migration plan

## Issue management process

## Testing & reconciliation strategy

## Support archiving of data in an accessible format

## Purging of data

## Enabling of legacy decommissioning

## Monitoring and tracking against the plan

## Entry and Exit criteria for each trial load, dress rehearsal and cutover.

## Approach to validating / testing migrated data.

## Roles and responsibilities for all teams.

## Key risks, assumptions, issues and dependencies.

## Timelines for key activity; aligned with the detailed Programme / Project Plan

## There will be a separate tender to lead on and implement an archiving and clinical data repository solution. Any proposals should be considered in the context of these requirements.

# The requirement

This section documents the decisions made for the inclusion or exclusion of data to be migrated for all relevant data sets. These datasets reflect the requirements and data migration capabilities of the Meditech Expanse system. The focus will be on agreeing a methodology that will allow activity for the same condition to be grouped into a pathway, the pathway type will either be reportable (RTT) or non-reportable (Non RTT) based on specific criteria. Pathways will need to be created for migration purposes for activity that is currently not categories as an RTT pathway.

Meditech Expanse recommend a minimal migration scope, which is outlined below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Migration Area** | **Approach** | **Description** | **Comment** |
| **Master Patient Index/Patient Demographics** | Data Extract and Standard Load | A full MPI and demographic migration. | Pre merge work across all 3 trusts must be completed to support this. Exclusions to be defined and agreed. |
| **Current Active Patient Activity** |  | Future activity for all ongoing and scheduled inpatient and outpatient activity. |  |
| ● Future appointments | Data Extract and Standard Load |  | Future clinic build must take place before the future appointments can be migrated. |
| ● Active Referral & Pathways | Data Extract and Standard Load |  | Need to agree how to manage non RTT and non-elective pathways.  Significant clean-up of open referrals is required.  Includes eReferrals. |
| ● Inpatient waiting lists (Surgical and non-surgical) | Data Extract and Standard Load |  | Details to be provided how the different types of inpatient waiting lists are managed within Meditech Expanse. |
| ● Outpatient waiting lists | Data Extract and Standard Load |  | Includes eReferrals. |
| ● Booked Theatres Procs | Data Extract and Standard Load |  | Details to be provided how the different types of inpatient waiting lists are managed within Meditech Expanse |
| Casenote Tracking | Data Extract and Standard Load | Current paper casenote location | Current location of casenotes and date |
| **Manual Migration** |  |  |  |
| Current admitted patients | | | |
| Any clinically significant information for current active inpatients (for example current medications) will need to be manually transcribed during cutover. | | | |
| Current Accident & Emergency attendances | | | |
| Maternity – any priority clinical data that is required | | | |
| **Known Exclusions** |  |  |  |
| Historical inpatient, outpatient and A&E activity will not be migrated as this will be viewable through an in-context link and will be included in the archiving scope | | | |
| Reference files such as locations, clinics are not migrated as the differences in data structures between systems make this ineffective. Should be incorporated into standards build. | | | |
| Document templates (clinic letters, discharge summary etc.) are not migrated as they need to be built in Expanse in order to incorporate the full range of functionality available. | | | |

# PROCUREMENT DETAILS

NWAHC intend to publish the invitation to tender (ITT) documents under the NHS London Procurement Partnership (LPP) OneLondon Local Health and Care Record Dynamic Purchasing System (DPS), using sub-category 1.3 Supporting Data Standards & Normalisation, in April 2024.

If you would like to be invited to further competition, but are not presently awarded on to the DPS, you can apply to join by registering at - [www.lppsourcing.org](http://www.lppsourcing.org) and completing the online selection questionnaire (SQ).

Upon completion of the SQ a supplier will be accepted within 10 working days, unless applying for a newly added category where a 30 day notice period is required before evaluation of apps takes place.

NWAHC intend to hold supplier information days in March.

Please contact [EPR-procurement@nnuh.nhs.uk](mailto:EPR-procurement@nnuh.nhs.uk) for further details.

Tender responses will need to be specific and considered to the tender, the collaborative will not be looking for a generic response. There will be a separate tender to lead on and implement an archiving and clinical data repository solution. Any responses should be considered in the context of these requirements.