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The

EMR Transition Plan & Checklist

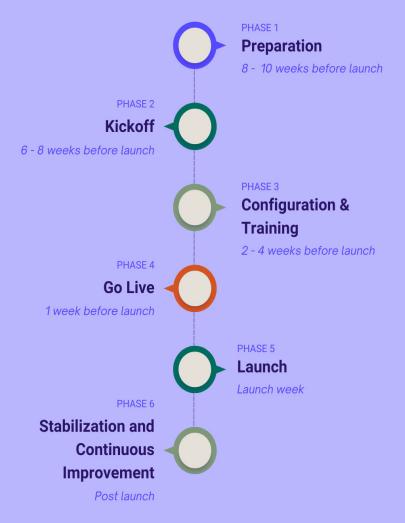**See how simple your switch can actually be.**

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You don't need to muscle through a messy EMR transition

Stride has the plan, the people, and the process to help your clinic make the switch confidently.

Stride Transition Timeline

PHASE 1
Preparation
8 - 10 weeks before launch

PHASE 2
Kickoff
6 - 8 weeks before launch

PHASE 3
Configuration & Training
2 - 4 weeks before launch

PHASE 4
Go Live
1 week before launch

PHASE 5
Launch
Launch week

PHASE 6
Stabilization and Continuous Improvement
Post launch

PHASE 1
Preparation

Assemble your transition team, define your vendor selection criteria and select a new vendor

TASKS:		Owner
✔	Assemble your transition team	Admin Lead or Super User
✔	Map current workflows and identify gaps	Transition Team
✔	Define your evaluation criteria	Clinic Leadership
✔	Research alternative EMR vendors	Clinic Leadership
✔	Conduct product demos with vendors	Clinic Leadership
✔	Request and compare pricing and contract terms	Clinic Leadership
✔	Select a new EMR vendor	Clinic Leadership

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PHASE 2
Kickoff

6 to 8 Weeks Before Launch

Create a transition plan and timeline, communicate to key stakeholders and communicate and define what success looks like

	TASKS:	OWNER:
✔	Establish your target launch date	Clinic Leadership
✔	Hold Kickoff Call	Project Coordinator
✔	Gain access to new EMR	Admin Lead or Super User
✔	Plan cutover logistics and schedule	Transition Team
✔	Schedule training sessions	Stride Onboarding + Clinic Trainers
✔	Communicate change to internal stakeholders and staff	Transition Team
✔	Begin data cleanup in current EMR	Admin Lead or Super User
✔	Notify your current vendor (if needed)	Clinic Leadership
✔	Inform payers/billing partners if needed	Billing Lead

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PHASE 3

Configuration and Training

Set up the new EMR for your clinic and get your staff trained and ready to work in the new system

2 to 4 Weeks Before Launch

	TASKS:	OWNER:
✔	Complete Clearinghouse and Payer Enrollments	Billing Lead
✔	Configure scheduling, calendar, and templates	Clinic Leadership
✔	Configure user accounts and security settings	Stride Onboarding + Clinic Trainers
✔	Conduct role-specific training	Stride Onboarding + Clinic Trainers
✔	Create Fee Schedule	Front Desk Lead
✔	Create Documentation Templates including Transition Note	Project Coordinator
✔	Export patient data from current EMR (~10 days before launch)	Admin Lead or Super User
✔	Initial data import into Stride for review and validation	Stride Onboarding
✔	Customize Intake Process and Forms	Project Coordinator
✔	Set up payers and billing rules	Admin Lead or Super User
✔	Start informing patients (if applicable)	Admin Lead
✔	Submit Card Processing Application	Project Coordinator

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PHASE 4
Go Live

Import data from your old EMR, set up your payers, customize templates for intake and documentation and get upcoming patients scheduled

	TASKS:	OWNERS:
✔	Begin patient scheduling in Stride	Front Desk Lead
✔	Ensure all therapists complete clinical notes in current EMR	Therapists
✔	Final data export from current EMR (~1-2 days before launch)	Admin Lead or Super User
✔	Final data import into new EMR before go-live (~1-2 days before launch)	Stride Onboarding
✔	Schedule recurring and upcoming appointments for Launch week	Front Desk Lead
✔	Enter transition notes for patients scheduled for week after launch	Therapists
✔	Verify migrated data and settings	Clinic Leadership

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PHASE 5
Launch

Start using
the system for
scheduling,
documentation
and billing

	TASKS:	OWNERS:
✔	Continue scheduling active patients day by day	Front Desk Lead
✔	Continue transition notes for all active patients	Therapists
✔	Begin entering new visit documentation in Stride	Therapists
✔	Start billing all scheduled visits	Billing Lead
✔	Reduce old EMR license count	Admin Lead or Super User

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Post Launch

Stabilization and Continuous Improvement

Verify data and settings, assess additional training needs, identify workflow improvements, monitor billing and claims results

	TASKS:	OWNERS:
✔	Schedule Weekly Check-ins	Admin Lead or Super User
✔	Decommission old EMR or go to single admin license	Admin Lead or Super User

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About Stride

Stride is a new generation of EMR - a single-system practice management platform built to meet the real-world needs of outpatient therapy clinics.

Stride delivers a truly complete solution—bringing together online practice marketing, fully digital workflows, and embedded AI that supports every stage of the patient and clinic lifecycle and powers the entire platform.

From automating clinical documentation to filling open appointments and streamlining day-to-day operations, Stride replaces outdated manual processes with intelligent automation that reduces administrative burden.

The result? Faster, more personalized care, fewer clicks for staff, and a system that enables growth without added complexity—delivering real ROI from day one.

SCHEDULE A DEMO today and see the impact Stride EMR can have on your practice, your staff, your patients and your bottom line.

www.StrideEMR.ai

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