

A person is seen from the side, sitting at a desk in a server room. They are looking at several computer monitors displaying data visualizations, including bar charts and line graphs. The background shows rows of server racks with glowing lights.

From Chaos to Control: Mastering Data Migrations in Applied Epic Projects

Data migration is one of the most critical—and often most underestimated—components of any Applied Epic project. Whether you're moving from a legacy system like TAM or migrating from another platform entirely, mishandling the transition can lead to lost records, operational downtime, and compliance risks.

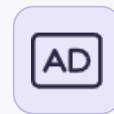
Transform your Applied Epic implementation with our battle-tested six-step migration methodology that eliminates risk and ensures seamless transition of your critical business data.



by Kimberly Wiethoff



Understanding Data Discovery



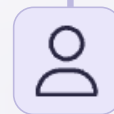
Audit Legacy Data

Examine policies, client records, notes, attachments, and accounting entries.



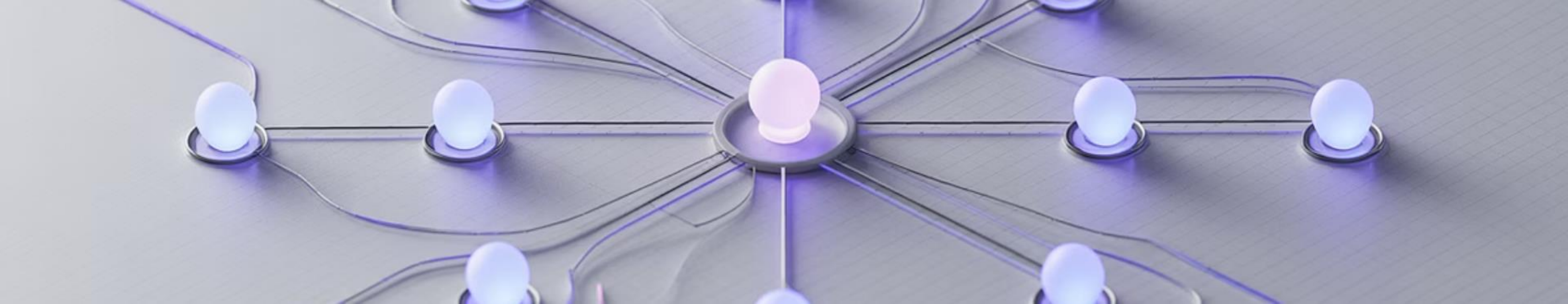
Assess Data Quality

Identify duplicates, outdated records, and inconsistencies.



Determine Data Ownership

Assign responsibility for each dataset to specific team members.



Mapping Your Data Journey

Field Mapping Documents

Create detailed documentation showing how each field transfers from legacy systems to Applied Epic.

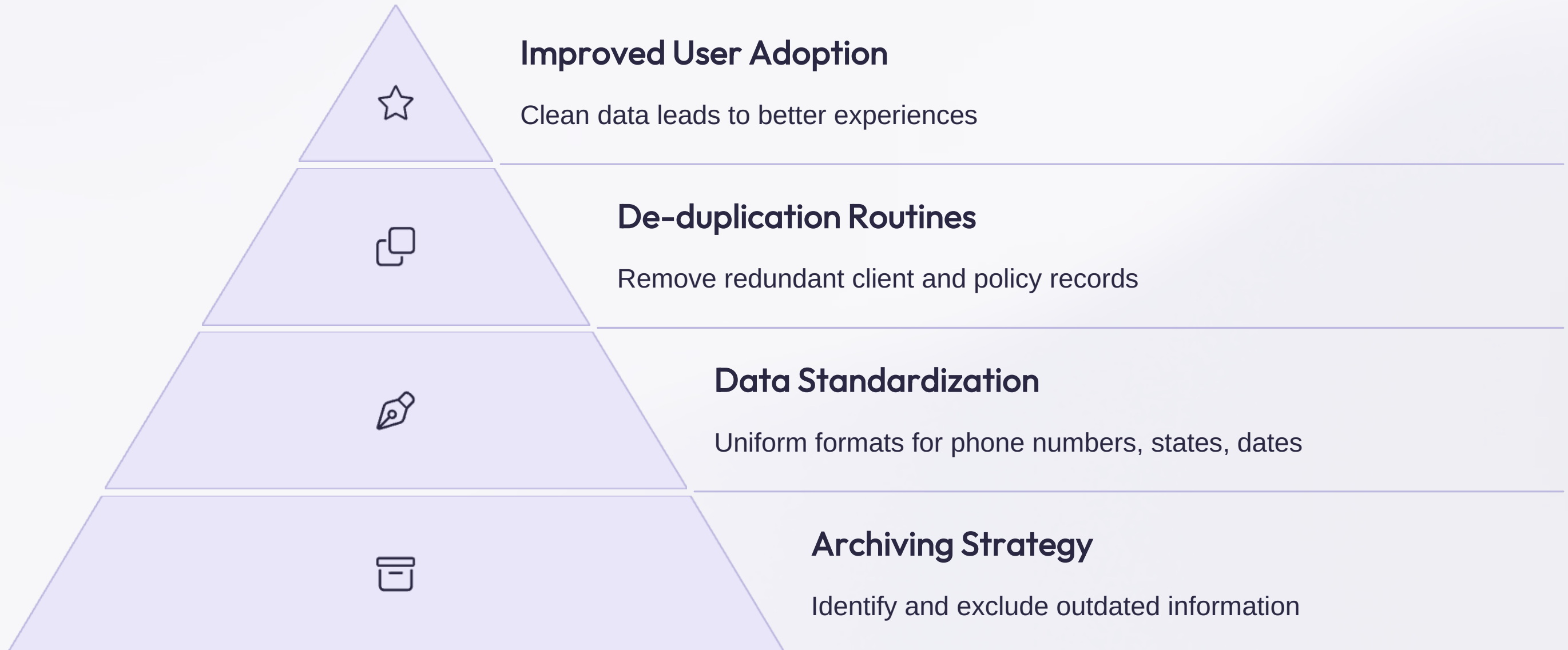
Data Transformations

Define code value conversions, date format changes, and other necessary transformations.

Business Rules for Exceptions

Establish clear rules for handling incomplete or non-standard data during migration.

The Art of Data Cleansing





Testing: The Path to Confidence

Partial Data Dry Runs

Validate mappings and transformations with sample data sets. Identify issues early in the process.

Full Test Loads

Conduct complete data migrations in test environments. Enable stakeholder review and UAT testing.

Reconciliation Validation

Compare record counts and validate accounting balances. Ensure data integrity across systems.



Precision Cutover Planning

1 Establish Cutover Date

Set clear timeline with data freeze period. Communicate to all stakeholders.

2 Create Backup Plans

Develop detailed rollback procedures. Test recovery processes before go-live.

3 Define Extraction Windows

Schedule final data pulls. Include validation routines after extraction.

4 Organize Support Team

Assign specialized resources for Day 1. Focus on accounting and client service.

Post-Migration Support Framework





Key Migration Challenges



Timeline Pressure

Migrations often face compressed schedules while requiring extensive preparation.



Data Complexity

Legacy systems may contain decades of unstructured or inconsistent information.



Resource Gaps

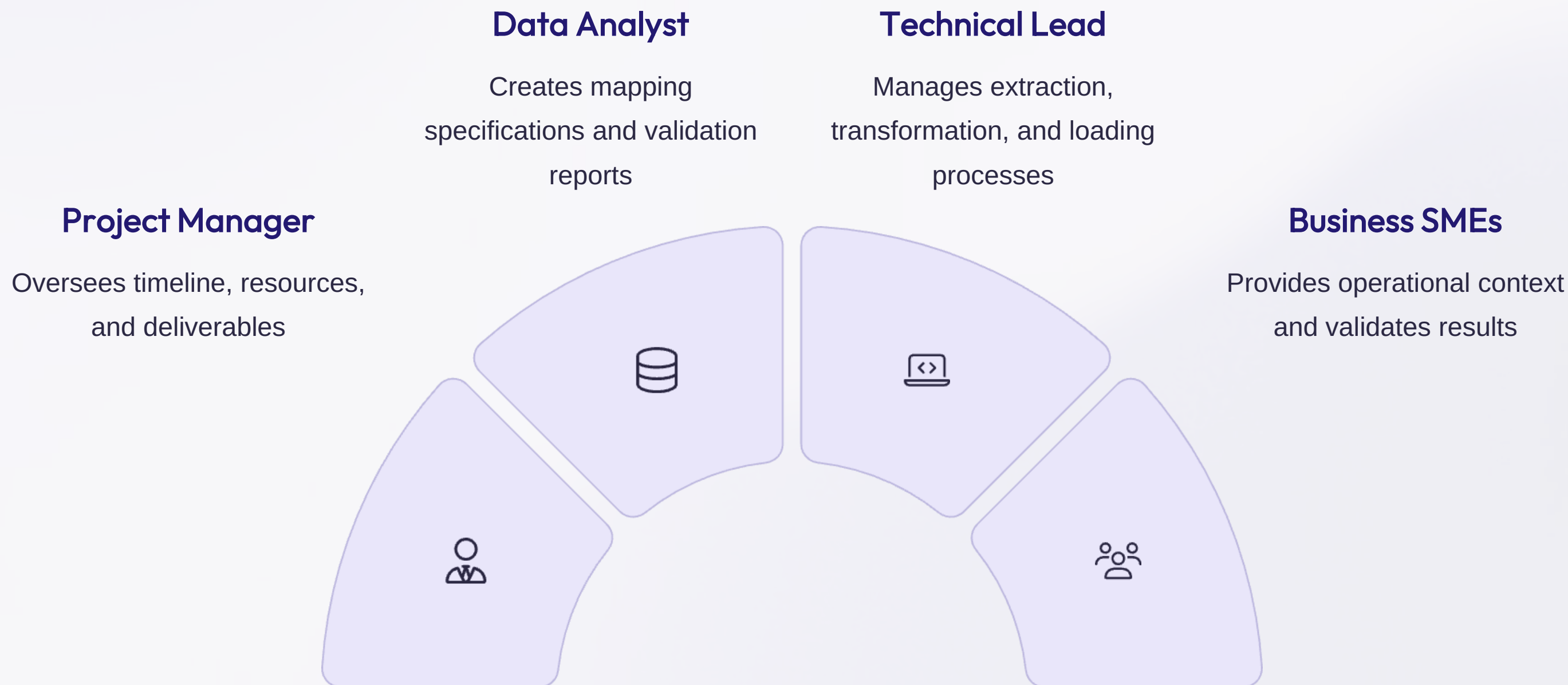
Teams frequently lack specific Applied Epic technical expertise.



Business Continuity

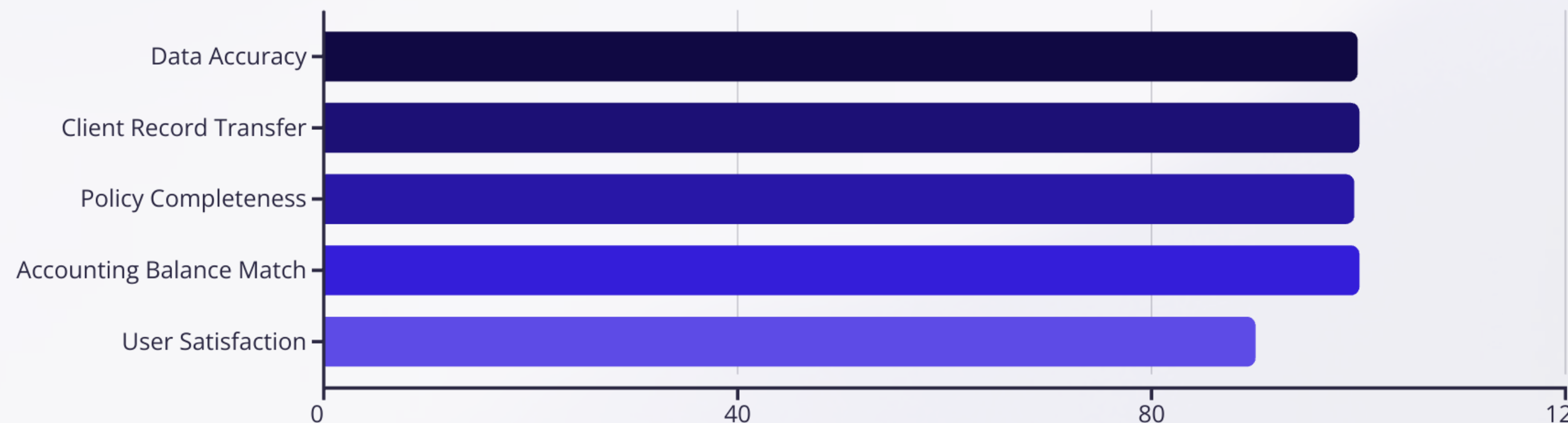
Operations must continue with minimal disruption during transition.

Migration Team Structure



Migration Performance Metrics

Setting clear performance targets ensures measurable migration success. These key metrics represent our minimum acceptable thresholds for a successful implementation.



While technical metrics demand near-perfect results, we recognize that user satisfaction targets are more conservative as adaptation to new systems naturally requires adjustment time. Post-migration remediation efforts will prioritize addressing any gaps in these performance areas.

Technology Enablers

ETL Tools

Extract, transform, and load utilities specifically designed for insurance data.

- Talend
- Informatica
- Custom SQL scripts

Validation Software

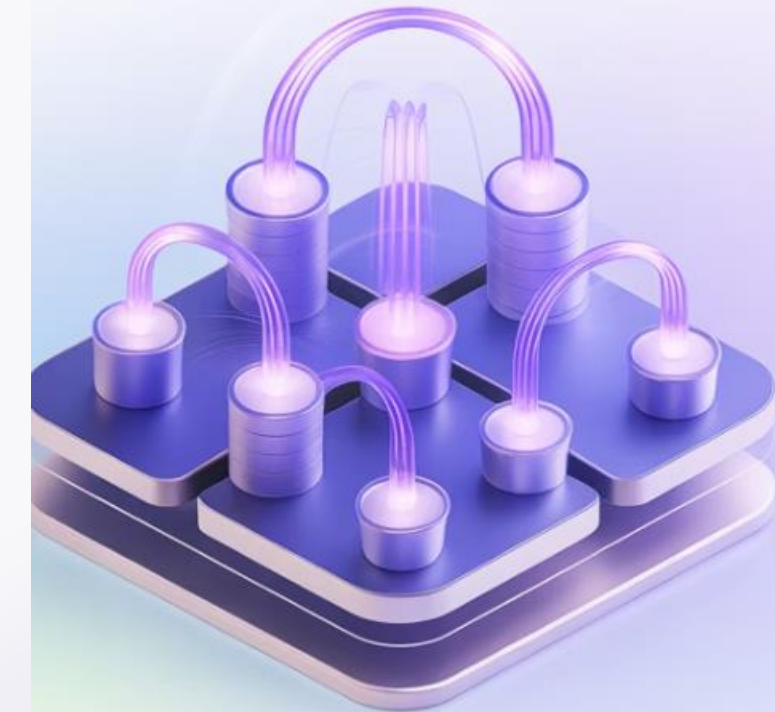
Tools that verify data integrity before, during, and after migration.

- Automated reconciliation
- Data profiling utilities
- Exception reporting

Applied Epic APIs

Integration points that enable programmatic data loading and validation.

- Client/Policy APIs
- Accounting interfaces
- Document management



Seamless data Migration, simplified

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Your Path to Migration Success



Start with thorough discovery

Know your data landscape completely



Cleanse early and thoroughly

Don't migrate problems to your new system



Test, test, and test again

Validate every aspect of your migration



Support beyond go-live

Your migration journey continues after launch

Final Thoughts

Managing an Applied Epic data migration isn't just a technical exercise—it's a business-critical project that requires collaboration, attention to detail, and proactive leadership. By investing time in planning, cleansing, testing, and post-go-live support, you'll pave the way for a smooth transition and long-term success.

