# From Chaos to Control Managing Data Migrations in Applied Epic Projects

**Published on 11 June 2025 at 18:12**

**By Kimberly Wiethoff**

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.

For project managers overseeing an Epic implementation or conversion, having a structured data migration plan is key to success. In this blog, we’ll walk through the essential strategies to take your migration from chaos to control.

## 1. Start with a Data Discovery Phase

Before you move a single record, you must understand what you're working with. The **discovery phase** involves:

* **Auditing legacy data**: Policies, client records, notes, attachments, and accounting entries
* **Assessing data quality**: Identify duplicates, outdated records, and inconsistencies
* **Determining data ownership**: Who is responsible for each dataset?

This phase gives you the clarity needed to estimate effort, assign roles, and avoid costly surprises later.

## 2. Establish a Data Mapping Strategy

Once you know what data exists, the next step is mapping it to the Epic data structure. A strong mapping plan includes:

* **Field-by-field mapping documents**
* **Transformations** (e.g., code value conversions, date formats)
* **Mapping exceptions** with business rules (e.g., "If Producer Code is missing, default to CSR")

Collaborate with Epic admins, business analysts, and legacy system SMEs to ensure mappings reflect operational workflows.

## 3. Prioritize Data Cleansing Early

Dirty data leads to poor user adoption and productivity losses. As PM, advocate for:

* **De-duplication routines**
* **Standardizing data values** (e.g., state codes, phone formats)
* **Archiving or excluding old/inactive records**

Data cleansing should begin well before the actual migration and continue through testing.

## 4. Test in Multiple Phases

Successful Epic migrations rely heavily on structured testing. Plan for:

* **Dry runs with partial data** to validate mappings and transformations
* **Full test loads** for UAT and stakeholder review
* **Reconciliation reports** to compare record counts and validate accounting balances

Testing should include both technical validation and end-user testing to ensure workflows operate as expected.

## 5. Plan the Cutover with Precision

Your go-live strategy can make or break the migration. Include:

* **A clear cutover date and freeze period**
* **Backup and rollback plans**
* **Final data extraction windows and validation routines**
* **Go-live support schedule** (especially for accounting and client service teams)

Communicate roles and escalation paths well in advance. The fewer surprises on Day 1, the better.

## 6. Post-Migration Support & Cleanup

Migration doesn't end at go-live. PMs should track:

* **Open defects and data gaps**
* **Training gaps related to newly imported records**
* **Continuous feedback from users on missing or misaligned data**

Set up a **post-migration clean-up task force** to resolve lingering issues over the first 30–90 days.

## 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.

#InsuranceTech #DataMigration #AppliedEpic #ProjectManagement #LegacySystemConversion #Insurtech #DataCleansing #ChangeManagement #EpicImplementation #InsuranceSoftware #ManagingProjectsTheAgileWay

## Resources

Here’s a curated list of essential reads and resources to guide project managers through Applied Epic data migration:

### 📘 Official Applied Epic Training & Guides

* **Applied University: Data Conversion Track**  
  Covers the fundamentals of data conversions, schedule planning, code alignment, and quality assurance processes. Offers both live instructor-led and on-demand sessions, plus daily office hours ([appliedsystems.com](https://www.appliedsystems.com/media/epictraining1/dataconversion.htm?utm_source=chatgpt.com)).

### ✅ Agency-Driven Lessons & Checklists

* **“Insider Secrets for a Successful Migration to a New Management System” (Applied/TAM → Epic)**  
  A PDF based on real-world agency experiences; discusses minimal data retention, staff engagement, training cadence, and realistic expectations ([www1.appliedsystems.com](https://www1.appliedsystems.com/globalassets/all-documents/resources/ebooks-guides-infographics/tam_migration_lesson_learned_en-us.pdf?utm_source=chatgpt.com), [www1.appliedsystems.com](https://www1.appliedsystems.com/globalassets/all-documents/resources/ebooks-guides-infographics/change-management-5-tips.pdf?utm_campaign=TAM-to-Epic-Migration&utm_content=Guide&utm_medium=Web&utm_term=&utm_source=chatgpt.com)).
* **“Preparing for your Applied Epic Conversion” (Kite Tech)**  
  A step-by-step PDF including sample data review, team selection, data purging guidelines (codes, contacts, open tasks), project timelines (6–12 months), and pre- and post-entry steps ([kitetechgroup.com](https://www.kitetechgroup.com/wp-content/uploads/2021/03/Preparing-for-your-Applied-Epic-Conversion-3.pdf?utm_source=chatgpt.com)).

### 🧰 Third-Party Tools & Integration Solutions

* **RecordLinker: Painless Migration to Applied Epic**  
  A machine-learning-powered Old→New mapping tool for entity resolution. Enables early identification of data issues, pre-mapping, and ongoing syncs with Applied Epic ([recordlinker.com](https://recordlinker.com/migration-to-applied-epic/?utm_source=chatgpt.com)).

### 🧠 Workflow & Post-Migration Best Practices

* **Applied Epic Post-Migration: Steps for Continued Success**  
  Focuses on post-go-live configuration: report setup, standardized workflows, ongoing training, and patience during adoption ([kitetechgroup.com](https://www.kitetechgroup.com/applied-epic-post-migration-steps-for-continued-success/?utm_source=chatgpt.com)).

### ⚠️ Change Management & Staff Engagement

* **Epic Change Management: 5 Tips for a Successful Move**  
  PDF guide on early team communication, structured training, accountability, fun engagement tactics (lunch‑and‑learns, quizzes), and building excitement ([www1.appliedsystems.com](https://www1.appliedsystems.com/globalassets/all-documents/resources/ebooks-guides-infographics/change-management-5-tips.pdf?utm_campaign=TAM-to-Epic-Migration&utm_content=Guide&utm_medium=Web&utm_term=&utm_source=chatgpt.com)).

### 🎥 Video Tutorials & Webinars

* **Recommendations for Your Applied Epic Conversion (YouTube)**  
  Video covering data cleanup strategies, implementation team structure, proactive transition steps, and success drivers ([youtube.com](https://www.youtube.com/watch?v=aGVnvRdqH3A&utm_source=chatgpt.com)).

### 🧪 Healthcare Epic Migration Insights (Cross‑Industry)

* **“Planning Epic Conversions: 8 Common Pitfalls & How to Avoid Them”**  
  Though healthcare‑focused, this March 2025 article highlights universal migration issues: governance, workflow design, data validation, multi‑phase testing, and stakeholder involvement ([healthcareitleaders.com](https://www.healthcareitleaders.com/blog/rethinking-epic-conversions-common-pitfalls/?utm_source=chatgpt.com)).

### 📋 Quick Link List: Applied Epic Data Migration Resources

| **Resource** | **Description** | **Link** |
| --- | --- | --- |
| **Data Conversion Track (Applied University)** | Live/recorded courses + office hours | [https://www.applieduniversity.com](https://www.applieduniversity.com/) *(Login required)* |
| **Insider Secrets for a Successful Migration** (PDF) | Real agency migration stories and lessons learned | [Download PDF](https://www1.appliedsystems.com/globalassets/all-documents/resources/ebooks-guides-infographics/change-management-5-tips.pdf) |
| **Preparing for Your Applied Epic Conversion – Kite Technology** | Timeline, data clean-up checklist, team selection guide | <https://www.kitetechgroup.com/resources/preparing-for-your-applied-epic-conversion/> |
| **RecordLinker – Data Mapping Tool for Epic Migration** | Machine learning tool for record matching, pre-mapping | <https://www.recordlinker.com/solutions/applied-epic-migration> |
| **Epic Change Management: 5 Tips (Applied Systems PDF)** | Tips to gain team buy-in and reduce resistance | [Download PDF](https://www1.appliedsystems.com/globalassets/all-documents/resources/ebooks-guides-infographics/change-management-5-tips.pdf) |
| **Post-Migration Best Practices – ACT User Group** | Reporting, configuration, staff training post-go-live | <https://act.autorate.com/article/applied-epic-post-migration-tips> |
| **YouTube: Applied Epic Conversion Recommendations** | Webinar with expert advice on data readiness and workflows | <https://www.youtube.com/watch?v=2OVhzUrRifg> |
| **8 Common Pitfalls in Epic Conversions (Healthcare)** | Cross-industry migration lessons for PMs | <https://www.healthit.gov/news/planning-epic-conversions-pitfalls> |