MICROSOFT WINDOWS 10 UPGRADE CHECKLIST

Summary

Upgrading to Windows 10 requires many important considerations for a clinic to plan for or be aware of to ensure a smooth transition and maintain privacy and security standards. Consider all of the general areas presented in the checklist below and review with IT support as needed to plan your upgrade to Windows 10.

Microsoft Windows 10 Upgrade Checklist

BACKUP

☐ Ensure all of your data is backed up before upgrading PCs

☐ Have a contingency plan in case you need to halt the upgrade and continue using the old operating system temporarily

HARDWARE

☐ Ensure your PC hardware meets or exceeds the recommended specifications for your EMR and your Windows 10

☐ Identify any new hardware that may be needed ahead of the transition, (eg. peripherals, workstations)

PERFORMANCE

☐ Consider time and bandwidth needed for the initial upgrade of your PCs, plan to upgrade outside of business hours

☐ Upgrade using a hard-wired connection where possible, upgrades over wireless will take much longer

☐ Disable or remove any unnecessary software added automatically from the Windows 10 upgrade (eg. free trial software, browser add-ons, Microsoft OneDrive)

☐ Disable any unnecessary operating system features that became enabled during the upgrade

PRIVACY & SECURITY

☐ Check settings that share your personal data with other resources and limit to appropriate resources only

☐ Review all settings of new features introduced in Windows 10 to ensure they meet the privacy expectations of your practice

☐ Ensure operating system and anti-virus are scheduled to update regularly

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SOFTWARE

- ☐ Choose the appropriate version of Windows 10; should be Windows 10 Professional or Enterprise for business use to support clinic security and privacy requirements
- ☐ Review any business-critical software requirements, including EMR, to ensure compatibility with Windows 10
- ☐ Identify any software or software updates are needed ahead of the transition such as new drivers

TRAINING

- ☐ Test out Windows 10 ahead of time on a single workstation to understand the impact of changes for business-critical software and processes
- ☐ Plan training for staff if required to adapt to visual and process changes in the new operating system or related software

Frequently Asked Questions

How do I know what new feature or settings are available in Windows 10?

The best place to review all of the new features implemented in Windows 10 and related requirements are the official Microsoft website:

Microsoft Windows 10 Specifications & System Requirements
https://www.microsoft.com/en-ca/windows/windows-10-specifications

Microsoft Windows 10 Features
https://www.microsoft.com/en-ca/windows/features

DISCLAIMER

This document provides general guidelines and approaches only. We strongly recommend that you retain a knowledgeable and qualified professional to regularly assess and maintain your clinic's technology.

For more information, guidance, or support contact:

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