



## MERGE CUSTOMER UPGRADE PROGRAM

Stay current.  
Reduce complexity.  
Unlock more value.

A customer guide to prioritizing your next Merge upgrade and preparing your organization for what comes next.

## Quick read summary

- A Merge upgrade helps your organization stay current, reduce complexity, and prepare for future innovation.
- Merge supports the process as a partner, helping customers understand readiness, dependencies, timing, and next steps.
- The upgrade journey is designed to reduce uncertainty through planning, communication, technical coordination, and post-upgrade support.
- Customers can begin with a low-pressure readiness conversation to explore options and build a practical plan at the right pace.

## Your upgrade is more than maintenance

Merge upgrades are designed to help your organization stay current, reduce operational complexity, and take advantage of innovative new capabilities. We know upgrades can feel like one more demand on already busy clinical, IT, and operational teams. That is why Merge approaches every upgrade as a partnership — helping your organization understand what is needed, plan with confidence, and move forward at the right pace.

The upgrade story is simple: more reliable to run, less complex to maintain, and better positioned to support modern imaging and cardiovascular care.

For many organizations, an upgrade is the point where operational readiness, clinical productivity, and long-term technology strategy come together. It creates an opportunity to evaluate how current systems are supporting daily work today while preparing the organization for a more connected, scalable, and innovation-ready future.

Whether you are ready to upgrade soon or simply need to understand your options, Merge will meet you where you are. Our goal is to help make the process clear, manageable, and aligned to your organization's priorities — not to ask your team to navigate the path alone.



# Why upgrade now?

Healthcare organizations are being asked to manage higher imaging volumes, tighter resources, rising security expectations, and growing demand for faster, more connected care. Older software environments can make that harder by increasing support burden, limiting access to newer capabilities, and creating avoidable technical debt. Prioritizing your upgrade now helps your organization stay ahead of those pressures instead of reacting to them later.

When customers delay upgrades, the impact can show up gradually: more manual workarounds, greater reliance on legacy configurations, longer support cycles, and fewer opportunities to take advantage of product improvements. By moving forward with a planned upgrade, customers can shift from a reactive posture to a more proactive approach to their enterprise imaging strategy.

- Stay on current, supported Merge software versions.
- Reduce risk associated with aging environments and avoidable technical debt.
- Improve reliability, maintainability, and long-term platform readiness.
- Prepare for future workflow, cloud, and AI-enabled innovation across the Merge portfolio.

## If this sounds familiar, it may be time to upgrade

Upgrade conversations often begin when teams recognize that their current environment is working harder than it should. Even when systems remain operational, small points of friction can compound across clinical, IT, and administrative workflows. This section is intended to help customers identify common signals that it may be time to start planning.

- Your clinical teams are managing more volume with the same or fewer resources.
- Your IT team is spending too much time maintaining older environments.
- You want smoother workflows but are not yet on the latest version.
- You need a clearer path to future innovation, modernization, and scalability.



# Value for every stakeholder

A successful upgrade creates value across the organization because imaging and cardiovascular platforms support far more than a single department or workflow. They influence how clinicians read and report, how IT teams maintain critical systems, and how operational leaders plan for performance, scale, and future innovation.

## Clinical leaders

Support smoother reading and reporting workflows, reduce unnecessary friction, and help care teams access the information they need more efficiently.

## IT leaders

Move to a more current, supportable environment with clearer maintenance expectations, reduced legacy complexity, and a better foundation for future enhancements.

## Operational leaders

Improve confidence in platform performance, minimize avoidable disruption, and align technology planning with broader care delivery, productivity, and modernization goals.

# Portfolio value highlights

Upgrading helps customers take advantage of newer capabilities across the Merge portfolio. Depending on your current solution and version, your upgrade path may help improve productivity, streamline review and reporting, strengthen workflow orchestration, and support more scalable enterprise imaging strategies.

Each customer's upgrade path will depend on the products they use, their current version, and their broader technology roadmap. The goal is to help customers understand not only what changes in the software, but how those changes may translate into easier daily use, stronger supportability, and a better foundation for future capabilities.

## Merge PACS™

Productivity enhancements and an improved reading experience, including capabilities such as improved spine labeling, pointer annotation, and preserved presentation state where applicable.

## Merge Cardio™

Streamlined structured reporting and smoother image review for cardiovascular teams.

## Merge Workflow Orchestrator™

Smarter study routing and workload distribution to help the right study reach the right reader more efficiently.

## Merge VNA™

Scalable archive strategy, consistent access to priors, lifecycle management, and storage optimization.



# A guided upgrade experience

The Merge upgrade experience is designed to reduce uncertainty and help your team move forward with confidence. Instead of treating the upgrade as a one-time technical event, Merge supports customers through a coordinated journey with clear ownership, planning, communication, and post-upgrade support.

From the first readiness conversation through post-upgrade stabilization, the experience is intended to make the path forward clearer. Customers should know what to expect, who is involved, what decisions need to be made, and how Merge will help support the transition before, during, and after the upgrade window.

**Assess → Plan → Schedule → Upgrade → Stabilize → Optimize**

This journey gives customers a simple way to understand the upgrade lifecycle. Each step builds on the one before it, helping teams move from initial assessment to execution and then into a stable, optimized operating model.

## 1. Readiness check

Merge confirms your current version, environment, integrations, and upgrade scope to create a shared starting point.

## 2. Plan and schedule

Your team and Merge align on timing, maintenance windows, delivery model, dependencies, and expectations before execution begins.

## 3. Upgrade

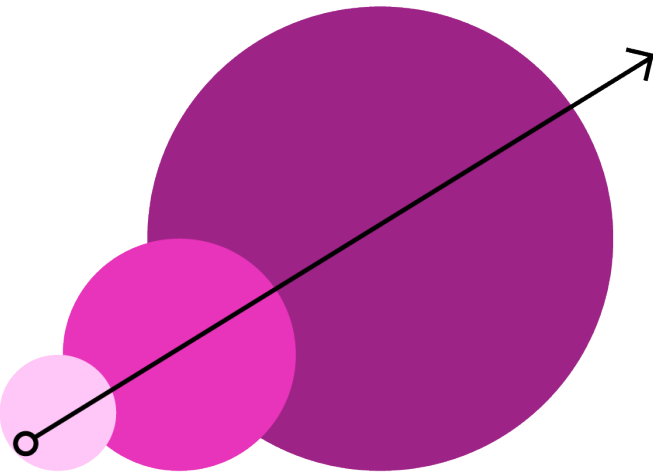
The upgrade is completed during the agreed window with technical resources, go/no-go checkpoints, and contingency planning in place.

## 4. Stabilize

After go-live, Merge provides focused monitoring and support while users become comfortable on the new version.

## 5. Optimize

Once stabilized, your organization operates on current, supported components with a stronger foundation and a clearer path for future enhancements.



# A partner at every step

Every customer environment is different, and every upgrade requires thoughtful planning. Merge works alongside your clinical, IT, and operational teams to understand your current environment, identify dependencies, coordinate timing, and support a smooth transition. From the first readiness conversation through post-upgrade stabilization, our goal is to make the process clear, manageable, and aligned to your organization's priorities.

- Readiness guidance to help define where you are today and what comes next.
- Planning and scheduling support that respects clinical and operational realities.
- Technical coordination to help surface dependencies before the upgrade window.
- Clear communication so stakeholders understand timing, roles, and expectations.
- Post-upgrade hypercare to support stabilization and adoption.



## Your team + Merge team

The most effective upgrades are collaborative. Your organization brings deep knowledge of your users, workflows, priorities, and operating constraints. Merge brings product expertise, upgrade planning experience, technical coordination, and ongoing support. Together, we can create a practical path that fits your environment and helps reduce uncertainty for the teams involved.

### Your team brings

Knowledge of clinical workflows, operational priorities, IT environment details, preferred timing, and internal constraints.

### Merge brings

Product expertise, upgrade planning guidance, technical coordination, implementation experience, and post-upgrade support.

## Designed to reduce disruption

One of the most common reasons customers postpone upgrades is concern about disruption. The Merge upgrade approach is built to address that concern directly through planning, coordination, communication, and support. The objective is to help customers move forward with confidence while protecting day-to-day clinical and operational continuity.

- Planned maintenance windows aligned to your operational needs.
- Go/no-go checkpoints to support informed decision-making.
- Defined contingency and rollback planning where applicable.
- Cross-functional coordination across customer success, professional services, support, product, and your account team.
- Post-upgrade hypercare to support stabilization and adoption.

Your team will not have to manage every dependency alone. Merge helps organize the process, surface key considerations early, and coordinate the right resources so the upgrade can be planned with greater confidence and fewer surprises.

# FAQs and assessments

## Frequently asked questions

The readiness conversation is designed to give your team practical answers, clarify what to expect, and help you make informed decisions without unnecessary pressure.

### How much disruption should we expect?

Merge works with your team to align on timing, maintenance windows, checkpoints, and support needs before the upgrade occurs, with the goal of minimizing disruption to clinical and operational workflows.

### How long does the upgrade process take?

Timing depends on your current environment, solution scope, dependencies, and preferred upgrade window. The readiness conversation helps establish a practical timeline before any commitment is made.

### What resources will our team need?

Merge helps identify the right clinical, IT, operational, and administrative stakeholders so your team can prepare without overextending resources.

### What if we are not ready yet?

Merge can help you understand your options, identify gaps, and build a practical plan for when the timing is right.

### What happens after go-live?

Merge provides post-upgrade support to help stabilize the environment, address questions, and support adoption after the upgrade window.

## Upgrade readiness assessment

You may be ready for an upgrade if any of the following apply:

- You are not on the latest supported version of your Merge solution.
- Your users are experiencing workflow friction that newer capabilities may help address.
- Your environment requires frequent maintenance or additional support effort.
- Your organization is preparing for broader modernization, cloud, workflow, or AI initiatives.
- You want a guided plan to upgrade with greater confidence and less uncertainty.

The readiness checklist is a simple starting point for internal discussion. It can help clinical, IT, and operational stakeholders determine whether an upgrade should be prioritized now, planned for an upcoming window, or aligned with a broader modernization initiative already underway.

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## Next steps checklist

Use this checklist to begin internal alignment and prepare for a productive readiness conversation with Merge.

- ☐ Confirm your current Merge solution version and any known upgrade requirements.
- ☐ Identify key clinical, IT, operational, and administrative stakeholders who should be involved.
- ☐ Capture known workflow pain points, support challenges, or maintenance concerns.
- ☐ Discuss preferred timing, blackout periods, and maintenance window considerations.
- ☐ Connect with your Merge representative to schedule a readiness conversation.

# Start with an upgrade conversation

If you are considering an upgrade — or simply want to better understand your current options — your Merge representative can help you start with a low-pressure readiness conversation. Together, we can review where you are today, discuss what may be needed, and identify a practical path that aligns with your clinical priorities, IT environment, operational timing, and broader modernization goals.

The readiness conversation is intended to inform — not pressure — your decision-making. It does not commit your organization to a specific date or implementation path. Instead, it gives your team a clearer view of dependencies, timing considerations, available support, and the steps that would make an upgrade successful when the time is right.

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When you are ready to explore your options, **contact your Merge representative** to begin a readiness conversation and build a thoughtful upgrade plan — at your pace, with the right support.

## About Merge

Merge empowers healthcare organizations with advanced medical imaging solutions to deliver reliable imaging, less complexity, and better care. Merge is trusted by 6 of the 10 largest U.S. health systems. Merge Imaging Suite, built on a cloud-native foundation, provides capabilities for Vendor-Neutral Archive (VNA), Enterprise Diagnostic Viewing, and Workflow Orchestration. The Merge portfolio also includes PACS, Cardiology, and Hemodynamic monitoring solutions, and support for Digital Pathology.

Learn more at [merative.com/merge](https://merative.com/merge)

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