

Epic Caboodle Data Warehouse - Go-Live Readiness Checklist

ETL | Derived Metrics | BI Platforms | HIPAA | TechFitFlow.com

Every gate must have a named owner and confirmed sign-off date before Caboodle goes live. Validate every derived metric against your canonical definition before the first dashboard is published. Unvalidated metrics published to leadership create analytical distrust that takes months to rebuild.

ETL VALIDATION - CLARITY TO CABOODLE

	Gate Item	Owner	Sign-off
[]	Caboodle ETL confirmed running after Clarity ETL completes - no overlap with Clarity extract window	_____	_____
[]	EncounterFact record count reconciled against Clarity PAT_ENC for same date range and encounter types	_____	_____
[]	Record count difference < 0.5% tolerance - any larger gap investigated and root cause documented	_____	_____
[]	PatientDim record count reconciled against Clarity PATIENT table	_____	_____
[]	DiagnosisDim ICD-10 codes spot-checked against Clarity CLARITY_EDG for sample of 100 diagnoses	_____	_____
[]	DepartmentDim names confirmed matching Clarity CLARITY_DEP for all departments in scope	_____	_____
[]	ProviderDim NPIs spot-checked against Clarity CLARITY_SER for sample of 50 providers	_____	_____
[]	DateDim fiscal year and fiscal quarter definitions confirmed matching organizational fiscal calendar	_____	_____
[]	ETL failure alerting configured - data architect notified within 30 minutes of ETL job failure	_____	_____
[]	ETL completion time documented - BI platform scheduled refresh set AFTER ETL completion time	_____	_____

DERIVED METRIC VALIDATION

	Gate Item	Owner	Sign-off
[]	LOS_DAYS in EncounterFact: Epic calculation method documented (which timestamps used)	_____	_____
[]	LOS_DAYS validated against organization's canonical LOS definition for a prior 3-month period	_____	_____
[]	LOS discrepancy between Epic pre-computed and org canonical definition documented and resolved	_____	_____

	Gate Item	Owner	Sign-off
[]	READMISSION_FLG: Epic definition documented (same facility, 30-day all-cause unplanned)	_____	_____
[]	READMISSION_FLG validated against org canonical readmission definition for a prior 3-month period	_____	_____
[]	READMISSION_FLG compared to CMS HRRP definition if used for regulatory/payer purposes	_____	_____
[]	RISK_SCORE or patient risk metrics: scoring model version and recalibration date documented	_____	_____
[]	All derived metrics with discrepancies resolved: use as-is, recalculate in query, or modify ETL logic	_____	_____
[]	Derived metric validation documented in writing for each metric - retained for governance record	_____	_____
[]	Clinical or quality leadership has confirmed validated metric definitions are acceptable for operational use	_____	_____

EXTERNAL DATA INTEGRATION (IF APPLICABLE)

	Gate Item	Owner	Sign-off
[]	External data sources identified and ETL pipeline designed before Caboodle go-live	_____	_____
[]	Linkage key between external data and Epic records confirmed (MRN format, NPI, CSN)	_____	_____
[]	External data linkage tested: JOIN between external source and Epic dimension produces expected match rate	_____	_____
[]	Linkage match rate > 90% confirmed - any lower rate requires data cleansing before go-live	_____	_____
[]	External data format inconsistencies (MBI hyphens, MRN leading spaces) resolved in ETL transform	_____	_____
[]	Record count reconciliation: external data in Caboodle matches source system record count	_____	_____
[]	Field-level spot check: 25 random external records compared between source and Caboodle	_____	_____
[]	HIPAA data use agreement or BAA confirmed for external data source before loading into Caboodle	_____	_____

BI PLATFORM CONNECTION AND HIPAA

	Gate Item	Owner	Sign-off
[]	BI platform (Power BI / Tableau / Qlik) covered by HIPAA BAA with health system - confirmed by privacy officer	_____	_____
[]	Caboodle connection uses read-only service account - no write permissions on Caboodle schema	_____	_____
[]	Row-level security configured in BI platform - users see only their authorized data scope	_____	_____
[]	DirectQuery vs Import mode decision documented with rationale - refresh schedule set if Import mode	_____	_____
[]	Power BI / Tableau refresh schedule set after Caboodle ETL completion time - not before	_____	_____
[]	BI platform access provisioning process documented - who can access which dashboards and at what scope	_____	_____
[]	BI platform access removal process documented - how access is revoked when staff leave or change roles	_____	_____
[]	No PHI in consumer-tier or personal BI accounts - all PHI-containing dashboards in enterprise/HIPAA-eligible tier	_____	_____

GOVERNANCE AND REPORT LIBRARY

	Gate Item	Owner	Sign-off
[]	Canonical metric definitions approved by clinical and operational leadership before first dashboard published	_____	_____
[]	Report governance process established: certified dashboards vs draft dashboards distinguished	_____	_____
[]	Named owner assigned for every dashboard before it is certified for operational use	_____	_____
[]	Duplicate metric elimination: only one certified dashboard per operational metric	_____	_____
[]	Stakeholders notified of authoritative Caboodle dashboards and canonical metric definitions	_____	_____
[]	Data analytics team access to Caboodle confirmed - read access to fact and dimension tables	_____	_____
[]	Quarterly metric definition review process established - owner responsible for updates	_____	_____
[]	Post-go-live monitoring: weekly check of ETL completion and BI platform refresh success for first 30 days	_____	_____