

Epic Cadence Scheduling - Go-Live Readiness Checklist

Provider Templates | Appt Types |
MyChart | TechFitFlow.com

Every gate must have a named owner and confirmed sign-off date before go-live approval. Incomplete items in template activation, MyChart configuration, or billing mapping create immediate operational and revenue impact on day one.

PROVIDER TEMPLATE VALIDATION

	Gate Item	Owner	Sign-off Date
<input type="checkbox"/>	All provider templates built and active for go-live date - activation dates confirmed	_____	_____
<input type="checkbox"/>	Template schedule period covers minimum 6-month forward-booking window	_____	_____
<input type="checkbox"/>	Each slot assigned correct appointment type(s) - no blank or placeholder slot types	_____	_____
<input type="checkbox"/>	Slot durations match appointment type default durations for all slot-type combinations	_____	_____
<input type="checkbox"/>	Hold slots configured correctly - not bookable by schedulers, auto-release dates set	_____	_____
<input type="checkbox"/>	Overbook slots configured per department manager and medical director approval	_____	_____
<input type="checkbox"/>	Wave scheduling parameters confirmed with clinical operations where applicable	_____	_____
<input type="checkbox"/>	Rotating template cycle confirmed correct - week A/B pattern validated by provider	_____	_____
<input type="checkbox"/>	Master templates applied correctly to all applicable providers - inheritance confirmed	_____	_____
<input type="checkbox"/>	Holiday and closure dates blocked across all provider templates	_____	_____
<input type="checkbox"/>	Template changes post-freeze communicated to scheduling operations and change-logged	_____	_____
<input type="checkbox"/>	Each provider reviewed and signed off on their own template - confirmed matches actual schedule	_____	_____

APPOINTMENT TYPE BUILD AND BILLING VALIDATION

	Gate Item	Owner	Sign-off Date
[]	Appointment type taxonomy approved by clinical operations leadership before build	_____	_____
[]	All appointment types built with correct duration, visit type, and billing visit type	_____	_____
[]	New patient vs established patient flag set correctly on every appointment type	_____	_____
[]	Billing visit type mapping reviewed and signed off by revenue cycle team	_____	_____
[]	CMS E/M documentation level confirmed appropriate for each billing visit type	_____	_____
[]	Telehealth appointment types flagged correctly - video platform integration tested	_____	_____
[]	Procedure appointment types mapped to correct CPT codes where applicable	_____	_____
[]	Annual wellness and preventive visit types configured per CMS billing requirements	_____	_____
[]	Appointment type-to-slot association complete - no appointment type missing a template slot	_____	_____
[]	Appointment type display names confirmed with scheduling operations staff	_____	_____

MYCHART SELF-SCHEDULING CONFIGURATION

	Gate Item	Owner	Sign-off Date
[]	MyChart self-scheduling enabled only for approved appointment types per specialty	_____	_____
[]	Behavioral health and sensitive service providers excluded from patient self-scheduling	_____	_____
[]	New patient self-scheduling restricted where referral or clinical gatekeeping required	_____	_____
[]	Established patient relationship check configured - new patients cannot book follow-up types	_____	_____
[]	Self-scheduling questionnaire routing validated - urgent symptom responses redirect correctly	_____	_____
[]	Telehealth video link generation tested end-to-end - link delivers via MyChart notification	_____	_____

	Gate Item	Owner	Sign-off Date
[]	Self-scheduling availability window confirmed - correct date range visible to patients	_____	_____
[]	Per-provider self-scheduling review completed - each provider setting confirmed individually	_____	_____
[]	Care Everywhere patient self-scheduling eligibility confirmed - cross-network patients handled	_____	_____
[]	MyChart self-scheduling tested from patient account in test environment before go-live	_____	_____

SCHEDULING RULES AND REFERRAL MANAGEMENT

	Gate Item	Owner	Sign-off Date
[]	Overbook limits configured and tested for all departments	_____	_____
[]	Scheduling lead time rules set per provider/specialty - forward-booking window enforced	_____	_____
[]	Referral requirement rules configured for all specialist appointment types	_____	_____
[]	Referral pool assignments confirmed for all specialty departments	_____	_____
[]	EMPI patient matching thresholds validated with realistic name/DOB variation test scenarios	_____	_____
[]	Duplicate patient detection workflow tested - scheduler merge/override path confirmed	_____	_____
[]	Scheduling restriction rules tested - blocked appointment types produce correct error message	_____	_____

PATIENT REMINDERS AND NOTIFICATIONS

	Gate Item	Owner	Sign-off Date
[]	Patient reminder configured for every appointment type that requires notification	_____	_____
[]	Reminder timing validated - correct days before appointment, correct channel (text/email/phone)	_____	_____
[]	Reminder content reviewed by clinical operations and patient access team	_____	_____
[]	Telehealth appointment reminder includes video link delivery - tested end-to-end	_____	_____
[]	Reminder opt-out workflow confirmed - patients who decline reminders not receiving them	_____	_____

	Gate Item	Owner	Sign-off Date
[]	No-show follow-up notification configured and tested where applicable	_____	_____

SIU INTERFACE AND DOWNSTREAM SYSTEMS

	Gate Item	Owner	Sign-off Date
[]	SIU S12 (new appointment) tested - RIS receives and creates worklist entry correctly	_____	_____
[]	SIU S13 (reschedule) tested - RIS updates appointment record correctly	_____	_____
[]	SIU S15 (cancel) tested - RIS cancels record, patient engagement platform notified	_____	_____
[]	SIU message filtering configured - receiving systems receive only relevant event types	_____	_____
[]	Appointment type code mapping confirmed between Cadence and RIS procedure codes	_____	_____
[]	SIU interface stability monitoring confirmed - 48-hour stability window completed	_____	_____

DATA CONVERSION AND GO-LIVE OPERATIONS

	Gate Item	Owner	Sign-off Date
[]	Forward-booking appointment conversion scope defined - date window confirmed	_____	_____
[]	Legacy appointment type to Epic appointment type mapping table approved by operations and revenue cycle	_____	_____
[]	Conversion validation completed - sample of converted appointments reviewed by schedulers	_____	_____
[]	Patient demographics on converted appointments verified against legacy source	_____	_____
[]	Super-users identified for every scheduling department and shift	_____	_____
[]	Super-user training completed and scheduling workflow competency confirmed	_____	_____
[]	Go-live command center includes Cadence build analyst and scheduling operations lead	_____	_____
[]	Escalation path documented: super-user > Cadence build analyst > Epic support	_____	_____

	Gate Item	Owner	Sign-off Date
[]	Downtime scheduling procedure documented, printed, and distributed to all scheduling areas	_____	_____
[]	Post-go-live monitoring: daily appointment volume and no-show rate vs baseline for 30 days	_____	_____