

Epic Build Defect Pre-Test Checklist by Module

Run Before IVT Cycle 1 | All Modules |
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Complete this checklist before IVT Cycle 1 begins. Each item validates a build configuration that is a known source of recurring Epic defects. Catching these before integrated testing prevents defects from appearing in IVT and consuming cycle time.

PRELUDE / REGISTRATION - PRE-IVT BUILD CHECKS

	Pre-Test Build Check	Analyst	Confirmed
[]	EMPI pre-go-live match simulation completed against production-equivalent patient data	_____	_____
[]	EMPI false positive rate (incorrect auto-links) measured and within approved tolerance	_____	_____
[]	EMPI false negative rate (missed matches creating duplicates) measured and within approved tolerance	_____	_____
[]	Top 10 payer group coverage records validated against legacy source - correct payer plan mapping confirmed	_____	_____
[]	ADT A04 test: patient registered, A04 confirmed in Bridges outbound queue, ACK received from all downstream systems	_____	_____
[]	Patient directory opt-out workflow tested - opted-out patient not displayed in directory lookup	_____	_____
[]	All Bridges test-mode hold timers confirmed DISABLED in test environment	_____	_____

CADENCE / SCHEDULING - PRE-IVT BUILD CHECKS

	Pre-Test Build Check	Analyst	Confirmed
[]	Provider template active date range confirmed for all providers in IVT scope	_____	_____
[]	Appointment type on template slots confirmed to match appointment types used during IVT testing	_____	_____
[]	SIU S12 tested for each appointment type - confirmed fired and ACK'd by RIS and patient platform	_____	_____
[]	SIU S15 (cancel) and S14 (modify) tested - downstream systems update correctly on appointment changes	_____	_____
[]	Referral routing tested - referral orders route to correct specialist scheduling queue	_____	_____

CPOE / ORDERS AND CDS - PRE-IVT BUILD CHECKS

	Pre-Test Build Check	Analyst	Confirmed
[]	Order routing rules reviewed: every relevant ordering department has a routing rule for every order type in IVT scope	_____	_____
[]	Test orders placed from each relevant department - routing to correct receiving queue confirmed	_____	_____
[]	CDS alert list reviewed with P&T; committee - scope confirmed appropriate before IVT	_____	_____
[]	All order sets reviewed by clinical champion against source protocol - no unreviewed order sets in IVT scope	_____	_____
[]	Order sets confirmed Published (not Draft) - all required orders present with correct defaults	_____	_____
[]	ORM message for lab orders reviewed against LIS vendor spec - field formats confirmed matching	_____	_____

CLINDOC / NURSING DOCUMENTATION - PRE-IVT BUILD CHECKS

	Pre-Test Build Check	Analyst	Confirmed
[]	Flowsheet-to-department assignment confirmed for every unit type in IVT scope	_____	_____
[]	Test bed assignment for each unit type - correct flowsheet confirmed loading after each assignment	_____	_____
[]	Documentation template charge trigger link confirmed populated for every note type with billing implications	_____	_____
[]	All SmartPhrases and SmartLinks confirmed Published status - not Draft	_____	_____
[]	Advance directive status confirmed linked to clinical alert display in clinical modules	_____	_____
[]	Shift handoff template reviewed by charge nurse super-user - all required fields present	_____	_____

WILLOW / PHARMACY - PRE-IVT BUILD CHECKS

	Pre-Test Build Check	Analyst	Confirmed
[]	Pharmacy routing rules reviewed: every ordering department has correct routing rule for each medication type	_____	_____
[]	Test orders placed from each department for each medication type - correct pharmacy queue confirmed	_____	_____
[]	Physical barcode scan completed for every medication type in IVT scope - all NDCs confirmed in Willow barcode table	_____	_____
[]	REMS workflow configured and tested for all REMS-required medications in formulary	_____	_____

	Pre-Test Build Check	Analyst	Confirmed
[]	ADC bed-to-cabinet mapping validated: every bed in IVT scope maps to the correct physical cabinet	_____	_____
[]	ADC update tested: admit test patient, confirm ADC cabinet updates within SLA	_____	_____

BRIDGES / INTERFACES - PRE-IVT BUILD CHECKS

	Pre-Test Build Check	Analyst	Confirmed
[]	All Bridges test-mode hold timers confirmed DISABLED in the integrated test environment	_____	_____
[]	All interface connections confirmed ACTIVE - no inactive or suspended interfaces in IVT scope	_____	_____
[]	Raw HL7 ADT message (A01, A02, A03, A04) extracted and compared against each receiving system vendor spec	_____	_____
[]	PID segment field format (PID.3, PID.5, PID.7) validated against each receiving system requirement	_____	_____
[]	PV1 segment fields (attending provider, patient class, room/bed) confirmed populated for A01 and A02	_____	_____
[]	Bridges Interface Monitor error queue alert threshold configured and tested	_____	_____
[]	ORU result message for lab and radiology results extracted and compared against receiving system spec	_____	_____

RESOLUTE / BILLING AND CHARGE CAPTURE - PRE-IVT BUILD CHECKS

	Pre-Test Build Check	Analyst	Confirmed
[]	Charge trigger status reviewed for every order type and documentation type in IVT scope	_____	_____
[]	Charge trigger status matches expected clinical workflow step for each service type	_____	_____
[]	Note template charge trigger link confirmed - field populated in all templates with billing implications	_____	_____
[]	CDM items reviewed for duplicate trigger configurations - no order type has multiple active triggers	_____	_____
[]	Payer plan routing reviewed: claims from each patient class route to correct billing entity (PB vs HB)	_____	_____
[]	Billing charge test: one clinical action completed per order type and charge queue checked within 5 minutes	_____	_____

COGITO / REPORTING - PRE-IVT BUILD CHECKS

	Pre-Test Build Check	Analyst	Confirmed
[]	Clarity ETL schedule reviewed per report: operational dashboards confirmed on near-real-time extract	_____	_____
[]	All Clarity ETL test-mode configurations confirmed disabled - production schedules active	_____	_____
[]	Every shipped report used for CMS or regulatory reporting validated against official measure specification	_____	_____
[]	Report data model column-level security reviewed - financial and sensitive columns restricted correctly	_____	_____
[]	SlicerDicer population filters reviewed by privacy officer - no unrestricted org-wide access	_____	_____
[]	ETL monitoring alert configured - DBA notified within 30 minutes of ETL failure	_____	_____