

# Epic PI Planning Template for ART Teams

SAFe | PI Objectives | Vendor Calendar | Dependencies | TechFitFlow.com

Map the Epic vendor calendar to your PI calendar before PI planning begins. Reserve sprint capacity for mandatory upgrade work. Define handling rules for mandatory mid-PI patches before they occur.

## PI PLANNING HEADER

<b>PI Number:</b>	_____	<b>PI Start Date:</b>	_____	<b>PI End Date:</b>	_____
<b>ART Name:</b>	_____	<b>RTE:</b>	_____	<b>Epic Version:</b>	_____

## EPIC VENDOR CALENDAR MAP TO PI SPRINTS

Fill in known Epic vendor events before PI planning. These constrain available team capacity and must be reflected in PI objective commitment levels.

Sprint	Sprint Dates	Epic Vendor Event (if any)	Capacity Impact	Teams Affected
<b>Sprint 1</b>				
<b>Sprint 2</b>				
<b>Sprint 3</b>		Annual upgrade Companion review	<b>15-20% per module team</b>	All teams
<b>Sprint 4</b>				
<b>Sprint 5</b>		Annual upgrade regression testing	<b>30-40% per team</b>	All teams
<b>Innovation Sprint</b>		Upgrade cutover + stabilization	<b>50%+ - limited feature work</b>	All teams

## PI OBJECTIVES - ALL TEAMS

Team	PI Objective Description	Business Value (1-10)	Confidence Vote (1-5)	Committed / Stretch	Completed?
Inpatient Clinical	Complete Willow BCMA configuration for all inpatient units. Super-user demo passes with zero Critical defects.	8	4	Committed	[ ]
Inpatient Clinical	Complete nursing flowsheet build for ICU and Med-Surg. ICU CNS sign-off obtained.	7	3	Committed	[ ]
Ambulatory	Configure prior auth FHIR CRD connection to BCBS and UHC. End-to-end test passing.	9	3	Committed	[ ]
Ambulatory	Deploy updated patient education SmartText library. Primary care sign-off obtained.	5	5	Stretch	[ ]
Revenue Cycle	Complete charge trigger configuration for top 30 CDM items. Charge lag report shows zero gaps.	9	4	Committed	[ ]

Infrastructure	Deploy Epic annual upgrade to preproduction. Regression test plan completed and signed.	10	4	Committed	[]
Infrastructure	Complete Bridges Interface Monitor alert configuration for all 14 interfaces.	8	5	Committed	[]

**ART DEPENDENCY BOARD**

Dependency ID	Requesting Team	Providing Team	Dependency Description	Due Sprint	Status	Escalated ?
DEP-001	Inpatient Clin	Infrastructure	ADT interface must be activated before BCMA workflow testing can begin	Sprint 2	GREEN	No
DEP-002	Ambulatory	Infrastructure	Epic Interconnect endpoint for BCBS FHIR CRD must be configured before PA testing	Sprint 3	AMBER - at risk	No
DEP-003	Revenue Cycle	Inpatient Clin	Charge triggers for inpatient medications depend on Willow order configuration completion	Sprint 3	GREEN	No
DEP-004	Infrastructure	External: BCBS	BCBS FHIR sandbox must be activated by Sprint 2 for Ambulatory PA testing	Sprint 2	RED - overdue	YES - RTE notified