

Epic Upgrade Companion Review Log

All Modules | Change Type | Pre-Upgrade
Actions | TechFitFlow.com

Every module analyst completes this log before the regression test plan is finalized. All REVIEW items must have a documented build action and analyst sign-off. No regression plan is complete without a completed Companion review log.

Change Type: AUTO = Automatic (no analyst action) | MANUAL = Requires analyst activation | REVIEW = Existing build may be affected - review required

CPOE / ORDERS - UPGRADE COMPANION REVIEW

Module	Companion Item	Type	Build Action Required	Analyst	Done?
CPOE	Weight-based dosing updated for renal adjustment	REVIEW	Review all weight-based order sets. Update dosing defaults. Test with CrCl < 30 scenario.	J.Smith	[]
CPOE	New Epic BPA opioid dosing advisory available	MANUAL	Activate if P&T; approved. Configure scope. Test alert fires and is suppressible.	J.Smith	[]
CPOE	Order set navigator layout updated - medication group ordering changed	AUTO	Review for layout impact. Brief super-users on changed navigation if significant.	J.Smith	[]
					[]

CLINICAL DOCUMENTATION (CLINDOC) - UPGRADE COMPANION REVIEW

Module	Companion Item	Type	Build Action Required	Analyst	Done?
ClinDoc	Shift handoff template - 2 JC fields added to shipped template	AUTO	If org uses shipped template: confirm new fields visible. Custom templates unaffected.	A.Brown	[]
ClinDoc	SmartLink .VITALS updated - new temperature unit field added	AUTO	Test .VITALS in note templates. Confirm output format matches org standard.	A.Brown	[]
ClinDoc	After Visit Summary medication section restructured	AUTO	Review AVS printout in preproduction. Brief outpatient staff on layout change.	A.Brown	[]
					[]

WILLOW / PHARMACY - UPGRADE COMPANION REVIEW

Module	Companion Item	Type	Build Action Required	Analyst	Done?
Willow	BCMA: additional confirmation step for high-alert medications	AUTO	Test BCMA for: insulin, anticoagulants, opioids. Confirm new step does not block workflow.	M.Jones	[]
Willow	ADC cabinet restocking alert threshold: configuration location changed	REVIEW	Locate current thresholds. Confirm they migrated. Test restocking alert behavior.	M.Jones	[]

					[]
					[]

BRIDGES / INTERFACES - UPGRADE COMPANION REVIEW

Module	Companion Item	Type	Build Action Required	Analyst	Done?
Bridges	ADT A04 PID.5 name field separator changed from ^ to ^^	REVIEW	Extract raw ADT from preproduction post-upgrade. Compare PID.5 against each downstream system spec. Add transform if needed.	Integration	[]
Bridges	SIU S12 appointment type field: new code values added	REVIEW	Test SIU S12 for each appt type. Confirm RIS and patient platform process updated codes.	Integration	[]
Bridges	Lab ORU: LOINC codes updated for 14 common lab components	REVIEW	Check receiving system LOINC mapping. Update mappings for 14 affected components.	Integration	[]
					[]

CLARITY / COGITO / REPORTING - UPGRADE COMPANION REVIEW

Module	Companion Item	Type	Build Action Required	Analyst	Done?
Clarity	ORDER_RESULTS COMPONENT_ID reference table updated to CMPNT_XREF_2026	REVIEW	Run all Clarity SQL queries joining COMPONENT_ID before and after upgrade. Compare result sets. Update JOIN table references.	J.Smith	[]
Clarity/Cogito	3 shipped Workbench data models updated: Patient Encounter, Med Admin, Orders	REVIEW	Test Workbench reports on these 3 data models. Confirm columns still return expected values.	J.Smith	[]
Cogito	ORDER_STATUS and BED_MGMT tables moved to near-real-time ETL schedule	AUTO	Confirm ETL schedule updated. Verify Workbench reports on these tables now show current-day data.	J.Smith	[]
					[]

RESOLUTE / REVENUE CYCLE - UPGRADE COMPANION REVIEW

Module	Companion Item	Type	Build Action Required	Analyst	Done?
Resolute	E/M charge trigger: now fires at note sign (was note submit)	REVIEW	Test E/M charge in preproduction. Pull charge lag report. Check for duplicate or missing charges. Review workaround builds.	A.Brown	[]
Resolute	Prior auth field now required for 5 additional CPT code ranges	AUTO	Identify affected CPT codes. Test claim preview. Confirm PA capture workflow captures for these codes.	A.Brown	[]
					[]

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