

# Epic Upgrade Cutover Runbook & Validation Checklist

Smoke Tests | Interface Validation | Clarity |  
Rollback | TechFitFlow.com

Cutover validation is a timed smoke test - not a repeat of the full regression cycle. Every step has a named owner and a time target. If a Critical defect is found, invoke the rollback decision process immediately.

## PHASE 1: UPGRADE COMPLETION (T+0 TO T+1 HOUR)

	Validation Step	Owner	Target	Result
[ ]	Epic confirms production upgrade completed - no server errors reported	Epic Tech	T+0:30	_____
[ ]	New Epic version number confirmed visible on login screen	PM	T+0:30	_____
[ ]	All Epic servers responsive - no login failures or error pages	Epic Tech	T+0:45	_____
[ ]	Test user login confirmed for each major role: RN, MD, Pharmacist, Registrar	IT Security	T+1:00	_____

## PHASE 2: INTERFACE SMOKE TESTS (T+1 TO T+3 HOURS)

	Validation Step	Owner	Target	Result
[ ]	Register test patient. Bridges Interface Monitor: confirm A04 in outbound queue. ACK received from all downstream systems.	Integration	T+1:30	_____
[ ]	Confirm A04 received by LIS - test patient appears in lab system	Integration + Lab	T+1:45	_____
[ ]	Place STAT CBC lab order. Confirm ORM fires and LIS receives within 60 seconds.	Integration + Beaker	T+2:00	_____
[ ]	Post CBC result in LIS. Confirm ORU returns to Epic - result visible in provider in-basket.	Integration + Beaker	T+2:15	_____
[ ]	ADC cabinet: admit test patient. Confirm cabinet updates within SLA.	Integration + Pharm	T+2:30	_____
[ ]	Bridges error queue: confirm zero messages after all interface smoke tests.	Integration	T+2:45	_____

## PHASE 3: CLINICAL WORKFLOW SMOKE TESTS (T+2 TO T+5 HOURS)

	Validation Step	Owner	Target	Result
[ ]	BCMA positive: scan correct wristband and medication. Administration completes without errors.	Pharmacy + Nursing	T+2:30	_____
[ ]	BCMA negative: scan wrong wristband. System blocks and alerts correctly.	Pharmacy + Nursing	T+2:45	_____

	Validation Step	Owner	Target	Result
[ ]	Sepsis order set: confirm weight-based dosing defaults are correct for standard patient weight.	CPOE + MD SU	T+3:00	_____
[ ]	Medication order and pharmacy verification: order placed, routes to pharmacist queue, verified and released.	Willow Analyst	T+3:30	_____
[ ]	ED registration: register walk-in patient. Correct encounter type and workflow loads.	Prelude Analyst	T+4:00	_____
[ ]	Nursing flowsheet: open for test patient. Correct unit-specific flowsheet loads.	ClinDoc Analyst	T+4:30	_____
[ ]	Provider note: sign note. Note saves. Charge fires in charge review queue.	CPOE + Rev Cycle	T+5:00	_____

#### PHASE 4: CLARITY AND REPORTING SMOKE TESTS (T+3 TO T+5 HOURS)

	Validation Step	Owner	Target	Result
[ ]	Run pre-saved Clarity SQL baseline queries. Row counts match pre-upgrade baseline.	Clarity Analyst	T+3:30	_____
[ ]	Run ORDER_RESULTS query with COMPONENT_ID join specifically. Result rows match expected count.	Clarity Analyst	T+3:45	_____
[ ]	Run Reporting Workbench daily census report. Encounter count matches expected for prior day.	Cogito Analyst	T+4:00	_____
[ ]	Clarity ETL scheduled to run tonight - no jobs disabled during upgrade.	Clarity + DBA	T+4:30	_____
[ ]	Charge lag report: confirm charges from smoke test clinical actions appear within 5 minutes.	Rev Cycle	T+5:00	_____

#### PHASE 5: GO / NO-GO AND 24-HOUR MONITORING

	Validation Step	Owner	Target	Result
[ ]	All mandatory smoke tests passed. Zero Critical open defects.	PM	T+5:30	_____
[ ]	Any open High defects have documented workaround or resolution plan.	PM + Analysts	T+5:30	_____
[ ]	Clinical leadership confirms GO for clinical operations.	PM + CNO	T+6:00	_____
[ ]	Command center staffed with all module analysts for first 8 hours.	PM	T+6:00	_____
[ ]	Integration analyst watching Bridges error queue for first 4 hours.	Integration	T+6:00	_____
[ ]	Day 1: charge lag report reviewed before end of business day.	Rev Cycle	Day+1	_____
[ ]	Day 1: ADT message volume reconciled against expected census.	Integration	Day+1	_____
[ ]	30-day post-upgrade review scheduled with all module analysts.	PM	Day+30	_____

## ROLLBACK DECISION PROCESS

<b>Authority:</b>	CMO + CIO joint decision. PM presents defect evidence. Decision made within 2 hours of Critical defect discovery.
<b>Threshold:</b>	Any Critical defect preventing a mandatory patient care workflow that cannot be resolved within 2 hours.
<b>Process:</b>	Call Epic on-call technical team. Epic estimates rollback time (typically 2-4 hours). PM communicates to clinical leadership. All test records preserved.