Epic Upgrade Regression Test Plan

Module-by-Module | Risk-Based | Mandatory Scenarios | TechFitFlow.com

Read Upgrade Companion sections for your modules before defining test scope. Mandatory scenarios must be tested every upgrade regardless of Companion content. All critical defects must be resolved before production upgrade cutover.

SECTION 1 - UPGRADE COMPANION REVIEW LOG

Module	Companion Item / Change Description	Change Type	Impact on Existing Build?	Build Action Required	Analyst	Completed
CPOE	Weight-based dosing calculation in order sets updated - new formula for renally-adjusted patients	Requires Review	YES - all weight-based order sets affected	Review and update dosing defaults in 23 sepsis and pneumonia order sets. Test with renally-adjusted patient scenario.	J.Smith	[ ]
Willow	BCMA patient identification updated - additional biometric confirmation for high-alert meds	Automatic	YES - BCMA workflow changes for high-alert meds	Test BCMA scan workflow end-to-end for insulin, anticoagulants, and opioids. Confirm new step does not block workflow.	A.Brown	[ ]
Bridges	ADT A04 PID segment format updated - middle name field separator changed from ^ to ^^ in PID.5	Requires Review	YES - all downstream systems receiving ADT may be affected	Extract raw ADT message from preproduction post-upgrade. Compare PID.5 format against each receiving system spec.	M.Jones	[ ]
Clarity/Cogito	ORDER_RESULTS table - COMPONENT_ID now uses updated reference table CMPNT_XREF_2026	Requires Review	YES - any SQL query joining on COMPONENT_ID may break	Run all operational Clarity queries in preproduction before and after upgrade. Compare result sets.	J.Smith	[ ]
ClinDoc	Shift handoff template - Joint Commission-required fields added to shipped handoff template	Automatic	LOW - custom handoff templates not affected unless using shipped version	Confirm custom handoff template still loads correctly. Verify JC fields appear if org uses shipped template.	A.Brown	[ ]
Resolute	Charge trigger timing updated for E/M visit documentation - charge now fires at note sign not note submit	Requires Review	YES - may cause duplicate charges if workaround builds exist	Test E/M charge timing in preproduction. Check charge lag report for duplicates. Review any charge workarounds for conflicts.	M.Jones	[ ]

SECTION 2 - RISK-BASED REGRESSION SCOPE MATRIX

Workflow / Scenario	Probability of Regression	Consequence of Failure	Priority	Tester	Scheduled Date	Result
BCMA scan - correct patient/med	HIGH (BCMA change in Companion)	CRITICAL - patient safety	MANDATORY	_____	_____	[ ] P [ ] F
BCMA scan - wrong patient (negative test)	HIGH (BCMA change)	CRITICAL - patient safety	MANDATORY	_____	_____	[ ] P [ ] F
Sepsis order set - weight-based dosing	HIGH (CPOE Companion item)	CRITICAL - patient safety	MANDATORY	_____	_____	[ ] P [ ] F
ADT A04 to LIS - patient appears in lab	HIGH (Bridges PID change)	CRITICAL - lab ordering	MANDATORY	_____	_____	[ ] P [ ] F
Lab ORM order fires, ORU result returns	HIGH (Bridges + Clarity change)	CRITICAL - lab results	MANDATORY	_____	_____	[ ] P [ ] F
Clarity SQL - ORDER_RESULTS query	HIGH (table structure change)	HIGH - reporting failure	HIGH	_____	_____	[ ] P [ ] F
E/M visit charge - single charge only	HIGH (charge trigger change)	HIGH - revenue impact	HIGH	_____	_____	[ ] P [ ] F
CDS sepsis alert fires at SIRS criteria	Medium (no direct Companion item)	HIGH - patient safety assurance	HIGH	_____	_____	[ ] P [ ] F
Shift handoff template loads correctly	LOW (custom template not affected)	MEDIUM - documentation gap	MEDIUM	_____	_____	[ ] P [ ] F
Reporting Workbench daily census report	HIGH (Clarity change)	MEDIUM - leadership metric	HIGH	_____	_____	[ ] P [ ] F

SECTION 3 - DEFECT LOG

Defect ID	Scenario Failed	Module	Description	Severity	Assigned To	Resolution	Status