

Epic IVT - Cycle Readiness & Exit Criteria Checklist

Cycles 1-3 | Dress Rehearsal |
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Define exit criteria BEFORE Cycle 1 begins - not after Cycle 3 when go-live pressure mounts. A cycle is not complete because the calendar says so. A cycle is complete when all exit criteria are met and confirmed by the project manager and clinical lead.

PRE-IVT ENVIRONMENT AND GOVERNANCE READINESS

	Gate Item	Owner	Confirmed Date
[]	Integrated test environment built with all Epic modules connected and interfaces activated	_____	_____
[]	All Bridges test-mode hold timers disabled in the integrated test environment	_____	_____
[]	Test patient data loaded - realistic patient demographics, coverage, and clinical history	_____	_____
[]	All analyst roles confirmed available for every IVT cycle day - no partial participation	_____	_____
[]	Integration analyst confirmed available to monitor Bridges Interface Monitor throughout all cycles	_____	_____
[]	Clinical SMEs scheduled for each IVT cycle - physician, nurse, pharmacist per service line	_____	_____
[]	IVT defect log template distributed to all analysts - severity classification guidelines confirmed	_____	_____
[]	IVT exit criteria formally defined and approved by project manager and clinical lead before Cycle 1	_____	_____
[]	Test scripts reviewed by relevant module analyst for accuracy before cycle begins	_____	_____
[]	IVT execution model confirmed: sequential, cross-module, simultaneous (not asynchronous by module)	_____	_____

CYCLE 1 READINESS - PRE-CYCLE GATES

	Gate Item	Owner	Confirmed Date
[]	All module unit testing phases complete - no known critical unit test defects outstanding	_____	_____
[]	Bridges interfaces all activated in test environment - confirmed by integration analyst	_____	_____

	Gate Item	Owner	Confirmed Date
[]	Core workflow test scripts finalized: inpatient admission, ED registration, outpatient visit, discharge	_____	_____
[]	Test patient accounts created in integrated environment - verified by Prelude analyst	_____	_____
[]	Test provider, pharmacy, and lab accounts created and confirmed accessible	_____	_____
[]	All analysts briefed on sequential execution model and their role in each scenario	_____	_____

CYCLE 1 EXIT CRITERIA

	Gate Item	Owner	Confirmed Date
[]	All Cycle 1 test scenarios executed - no scenario abandoned without defect logged	_____	_____
[]	All defects logged with ID, severity, module, observed/expected behavior, and assigned owner	_____	_____
[]	All CRITICAL defects reviewed in defect triage meeting within 24hr of discovery	_____	_____
[]	Remediation plan confirmed for every CRITICAL defect - estimated fix date documented	_____	_____
[]	Cycle 1 defect summary report completed: total, by severity, by module	_____	_____
[]	Project manager and clinical lead sign-off on Cycle 1 completion	_____	_____

CYCLE 2 READINESS - PRE-CYCLE GATES

	Gate Item	Owner	Confirmed Date
[]	All Cycle 1 CRITICAL defects resolved and verified - zero open critical defects entering Cycle 2	_____	_____
[]	Cycle 1 defect regression test cases added to Cycle 2 script	_____	_____
[]	Cycle 2 expanded test scripts ready: specialty workflows, order sets, billing scenarios	_____	_____
[]	Environment refreshed if major build changes were made to resolve Cycle 1 critical defects	_____	_____
[]	All analysts confirmed available for Cycle 2 duration	_____	_____
[]	Clinical SMEs rescheduled for Cycle 2 - updated with Cycle 1 findings and expected improvements	_____	_____

CYCLE 2 EXIT CRITERIA

	Gate Item	Owner	Confirmed Date
[]	All Cycle 2 test scenarios executed including regression of all Cycle 1 critical defects	_____	_____
[]	No Cycle 1 critical defect class recurs in Cycle 2 (same root cause reappearing)	_____	_____
[]	All Cycle 2 CRITICAL defects logged and remediation plans in place	_____	_____
[]	HIGH defect count declining from Cycle 1 to Cycle 2 - documented in trend report	_____	_____
[]	Test scenario pass rate at or above 80% target for Cycle 2	_____	_____
[]	Clinical SME confirmed all core workflow scenarios produce clinically appropriate outcomes	_____	_____
[]	Project manager and clinical lead sign-off on Cycle 2 completion	_____	_____

CYCLE 3 READINESS - PRE-CYCLE GATES

	Gate Item	Owner	Confirmed Date
[]	All Cycle 2 CRITICAL defects resolved and verified - zero open critical defects entering Cycle 3	_____	_____
[]	All Cycle 2 HIGH defects resolved or formally accepted with documented workaround	_____	_____
[]	Complete workflow scenario library ready for Cycle 3 - all patient types, all service lines	_____	_____
[]	Data conversion validation scenarios added to Cycle 3 script	_____	_____
[]	All module analysts and clinical SMEs confirmed available for complete Cycle 3 coverage	_____	_____

CYCLE 3 EXIT CRITERIA (REQUIRED FOR DRESS REHEARSAL APPROVAL)

	Gate Item	Owner	Confirmed Date
[]	Zero unresolved CRITICAL defects across all modules and workflows	_____	_____
[]	HIGH defect resolution rate \geq 95% - remaining HIGH defects formally accepted	_____	_____
[]	Overall scenario pass rate \geq 90% for all workflow categories	_____	_____

	Gate Item	Owner	Confirmed Date
[]	Clinical SME sign-off obtained from every service line included in IVT scope	_____	_____
[]	Charge capture validated: charges firing correctly for all billable clinical actions	_____	_____
[]	Interface stability confirmed: all ADT, ORU, ORM, SIU message types verified in Cycle 3	_____	_____
[]	Defect trend confirmed declining Cycle 1 > Cycle 2 > Cycle 3	_____	_____
[]	Project manager formal sign-off on Cycle 3 completion and dress rehearsal approval	_____	_____
[]	Clinical leadership formal sign-off on go-live readiness from IVT perspective	_____	_____

DRESS REHEARSAL READINESS GATES

	Gate Item	Owner	Confirmed Date
[]	Production environment data conversion completed and validated (patient record counts)	_____	_____
[]	Interface activation sequence documented and rehearsed by integration analyst	_____	_____
[]	User account access confirmed at scale - sample of all user types can log in and access correct modules	_____	_____
[]	Go-live command center staffing confirmed - all module analysts assigned to shifts	_____	_____
[]	Downtime procedures printed and distributed per module - practiced by clinical super-users	_____	_____
[]	Escalation path confirmed: super-user > module analyst > Epic support > vendor	_____	_____
[]	No new test scenarios introduced in dress rehearsal - only Cycle 3 regression	_____	_____
[]	Dress rehearsal sign-off obtained before go-live date is confirmed	_____	_____