

Reporting Workbench Report Build & Validation Checklist

Pre-Build | Filters | Security | Validation | Certification | TechFitFlow.com

Complete every section before certifying any Workbench report. Shipped Epic reports are not pre-validated for your organization - they require the same validation process as custom reports. Every CMS measure report requires comparison against the official measure specification.

SECTION 1: PRE-BUILD REQUIREMENTS (BEFORE OPENING WORKBENCH)

	Check Item	Owner	Done
<input type="checkbox"/>	Clinical question is defined in writing: what is being counted, measured, by whom, over what period	_____	___
<input type="checkbox"/>	Metric definition is documented and approved by the relevant clinical or operational leader	_____	___
<input type="checkbox"/>	Report requestor has confirmed what they will DO with the result (decision, regulatory submission, leadership dashboard)	_____	___
<input type="checkbox"/>	Existing report library searched - confirm this metric does not already have a certified report	_____	___
<input type="checkbox"/>	If existing report found: validate it meets the requestor's needs before building a new one	_____	___
<input type="checkbox"/>	Correct data model identified: unit of analysis matches what is being counted (encounter, patient, order, administration)	_____	___
<input type="checkbox"/>	Columns needed for the analysis listed before opening Workbench - only these columns will be added	_____	___
<input type="checkbox"/>	HIPAA minimum necessary review: patient-identifiable columns are included only if the clinical question requires them	_____	___
<input type="checkbox"/>	Report owner identified before build begins - report will not be certified without a named owner	_____	___

SECTION 2: DATA MODEL AND COLUMN SELECTION

	Check Item	Owner	Done
<input type="checkbox"/>	Data model selected has the correct unit of analysis (one row per encounter, not one row per medication)	_____	___
<input type="checkbox"/>	No SELECT * equivalent - column picker shows only columns needed for the analysis	_____	___
<input type="checkbox"/>	If patient-identifiable columns included: privacy officer review obtained before report is shared broadly	_____	___

	Check Item	Owner	Done
[]	Categorical columns confirmed readable (encounter type name, not just code number)	_____	_____
[]	Date/time columns confirmed with correct precision for the metric (datetime for LOS, date for period-level counts)	_____	_____
[]	Columns that would cause fan-out (one-to-many relationship without aggregation) identified and handled	_____	_____
[]	All columns have been tested to confirm they return expected values for known test encounters	_____	_____

SECTION 3: FILTER CONFIGURATION

	Check Item	Owner	Done
[]	Fixed filters defined: encounter type, department scope, and population restrictions are hardcoded in template	_____	_____
[]	Encounter type filter is present - report does not mix inpatient, outpatient, and ED encounters unless intentional	_____	_____
[]	Date range filter is configured as a parameter filter - user selects period at runtime	_____	_____
[]	Date range parameter has a sensible default value (last full calendar month for most operational reports)	_____	_____
[]	Date filter uses admission date OR discharge date depending on metric definition - confirmed correct	_____	_____
[]	Fixed filter for active/valid records: cancelled encounters, voided charges, and test accounts excluded	_____	_____
[]	If diagnosis-based filter: PRIMARY_DX_YN equivalent applied to prevent multi-row fan-out per encounter	_____	_____
[]	Filter for currently admitted patients handled explicitly (open encounters included or excluded with justification)	_____	_____
[]	Filter interaction tested: no conflicting filters on same column that would return zero rows	_____	_____

SECTION 4: SCHEDULED DELIVERY HIPAA AUDIT

	Check Item	Owner	Done
[]	If scheduled report contains PHI: delivery method is InBasket or HIPAA-covered email only - not personal email	_____	_____
[]	Recipient list reviewed by privacy officer before scheduled delivery is activated	_____	_____

	Check Item	Owner	Done
[]	Recipient list contains only users with documented clinical or operational need for this data	_____	___
[]	All recipients are active employees with active Epic accounts - no deactivated accounts on list	_____	___
[]	No email forwarding rules to personal accounts for any recipient on the list	_____	___
[]	Scheduled report run time is after Clarity ETL completion - not before nightly extract finishes	_____	___
[]	Scheduled report output format matches how recipients use the data (InBasket for summary, Excel for analysis)	_____	___
[]	Recipient list review scheduled quarterly - owner responsible for reviewing after any staff turnover	_____	___

SECTION 5: TECHNICAL VALIDATION

	Check Item	Owner	Done
[]	Report run against a date range with a known reference count from another source	_____	___
[]	Count difference between Workbench report and reference count is within 1% tolerance	_____	___
[]	Any count difference > 1% investigated and root cause documented before report is shared	_____	___
[]	If CMS quality measure: denominator and numerator compared field-by-field against official CMS measure specification	_____	___
[]	If CMS quality measure: date range and period anchor match CMS submission requirements exactly	_____	___
[]	Parallel period validation: report run for prior period compared to prior system output	_____	___
[]	Patient-level spot check: 10 sample records compared between Workbench output and Epic application	_____	___
[]	Report tested with minimum and maximum date range values - no unexpected behavior at boundaries	_____	___
[]	If scheduled: report output format and delivery tested with a test run before activating live schedule	_____	___

SECTION 6: CERTIFICATION AND GOVERNANCE

	Check Item	Owner	Done
<input type="checkbox"/>	Named report owner has accepted accountability for report accuracy and update schedule	_____	_____
<input type="checkbox"/>	Report name follows organizational naming convention (domain - metric - period - governance tier)	_____	_____
<input type="checkbox"/>	Report placed in correct organizational folder (not personal folder) with appropriate access permissions	_____	_____
<input type="checkbox"/>	Report description field populated: clinical question, metric definition, included population, date anchor	_____	_____
<input type="checkbox"/>	Data analytics team has reviewed report logic and approved for certification	_____	_____
<input type="checkbox"/>	Clinical or operational leader has confirmed the metric is correct and meets their needs	_____	_____
<input type="checkbox"/>	Report status set to CERTIFIED in Workbench governance tracking	_____	_____
<input type="checkbox"/>	Certification date and owner documented in report library tracker	_____	_____
<input type="checkbox"/>	Staff who will use this report notified of its existence and the authoritative metric definition	_____	_____
<input type="checkbox"/>	Schedule established for periodic review of certification (at least annually, or when clinical protocol changes)	_____	_____