PulseGuard Pilot Checklist — ED & Urgent Care

No PHI in development or demos. Read-only first.

Site: _____   **EMR:** _____   **Facilities in scope:** _____

Pilot length: 60–90 days   **Go-live target:** _____   **Review points:** Day 30 / Day 90

Primary champions: Clinical _____ IT _____ Quality/Risk _____ Security
_____

Success criteria: ≥ _____% closed-loop; ≥ _____% documented disclosure; culture
closure ≤ _____ h; median time to antibiotic change ≤ _____ h

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1) Legal & Compliance

☐ BAA executed (pilot scope) • InfoSec questionnaire approved • Data-flow & architecture on file • No PHI in dev/demos • DUA if required • Retention agreed (default 12 months)

2) Integration (read-only via Redox)

☐ Connections: Patient, Encounter, DiagnosticReport, Observation/micro • Transport and allowlist/VPN in place

☐ Mapping rationale documented • Validate 10–20 sample encounters pre-prod • Writebacks deferred until site approval

3) Configuration

☐ Incidentals lexicon set (eg nodule, aneurysm, adrenal/renal/hepatic lesion, thyroid/ovarian/pancreatic cyst, gallbladder polyp)

☐ Severity ladder & SLAs: Urgent 24 h, Routine 7–14 d

☐ Lab watch: pending-at-discharge, culture finals

☐ Ownership routing and escalation ladder • Templates: disclosure, safety-net, MyChart, call scripts

☐ RBAC roles and facilities list

4) Training & Change Management

☐ Quickstart 1-pager delivered • 30-min sessions for clinicians and nurse leads

☐ Kickoff email from clinical champion • Support channel and office hours set • Daily owner for queue hygiene in week 1

5) Go-Live (Day 0)

☐ Feeds live, dashboard populated • Create and close 3 test tasks (disclosure, message, order) and verify audit trail

☐ MFA enforced, permissions confirmed, audit logs recording

6) Checkpoints & Exit

☐ Day 7 tuning complete • Day 30 KPI review • Day 90 KPI review

☐ Export pilot report with KPIs, timeline, lessons learned, config snapshot

☐ Production plan or decommission per policy