

PulseGuard Pilot Checklist v2 — 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 60 / Day 90

Primary Clinical ___ IT ___

champions: Quality/Risk ___

Security ___

Success Criteria (KPI Ladder):

Note: Targets are improvement-based from baseline, not absolute pass/fail. Final targets subject to site agreement based on baseline measurement.

KPI	Baseline	Day 30	Day 60	Day 90
Closed-loop rate	____%	+5-10 pts	+10-15 pts	≥95%
Culture closure ≤ SLA	____%	≥90%	≥93%	≥95%
Disclosure rate	____%	≥93%	≥96%	≥98%
Unreviewed in-visit	____%	≤2%	≤1.5%	≤1%
Time to antibiotic change (median)	____h	≤18h	≤15h	≤12h
Incidental closure within guideline	____%	Urgent (24h): D30: 90% → D60: 93% → D90: 95% Routine (7-14d): D30: 75% → D60: 85% → D90: 90%		
Product KPIs: Imaging pipeline coverage	N/A	Track	Track	≥85%

Product KPIs: Suppression
accuracy

N/A

Track

≥90%

≥90%

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)
- ☐ **Baseline window (30-60 days pre-pilot) and weekly KPI snapshots documented in the DUA/measurement appendix**

2) Integration (read-only via Redox)

- ☐ **Core connections:** Patient, Encounter, DiagnosticReport, Observation/micro
- ☐ **Additional audit/evidence pulls:**
 - Communication/CommunicationRequest (patient/PCP messages)
 - ServiceRequest (referrals/orders)
 - Task/event log export endpoint (for result → task → action timeline)
- ☐ Transport and allowlist/VPN in place
- ☐ Mapping rationale documented
- ☐ Validate 10-20 sample encounters pre-prod
- ☐ **No writebacks during pilot; optional SMART on FHIR launch only for in-EHR viewing**

3) Configuration

- ☐ **Incidentals lexicon set:** nodule, aneurysm, adrenal/renal/hepatic lesion, thyroid/ovarian/pancreatic cyst, gallbladder polyp
 - Site guideline windows (Urgent 24h; Routine 7-14d) and referral SLA (e.g., 7-14d) mapped to task due-by
- ☐ Severity ladder & SLAs: Urgent 24h, Routine 7-14d
- ☐ Lab watch: pending-at-discharge, culture finals
- ☐ **Suppression rules:** enable duplicate/'no action required'/known-stable suppression; show monthly audit sample size and accuracy %

- ☐ **Ownership & handoff:**
 - ED follow-up queue owner defined
 - Auto-handoff rule to specialty/referral owner when referral is accepted/scheduled
- ☐ 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: _____
- ☐ Queue hygiene owner beyond Week 1 (name/role): _____
- ☐ Cause-code catalog for misses/variance (capture gap, staffing, referral backlog, payer/PA delay) so D30/D90 reviews have actionable attribution

5) Go-Live (Day 0)

- ☐ Feeds live, dashboard populated
- ☐ Create and close 3 test tasks (disclosure, message, order) and verify audit trail
- ☐ Generate and review one CSV audit export (result→task→message/order timeline) and one PDF case timeline
- ☐ MFA enforced, permissions confirmed, audit logs recording
- ☐ Confirm rolling 7-day medians and traffic-light bands render on KPI page

6) Checkpoints & Exit

- ☐ **Day 7:** Tune lexicon thresholds, suppression gates, referral routing; confirm 'cause codes' in use
- ☐ **Day 30:** KPI review - compare vs baseline; deliver KPI deltas + audit export; separate product KPIs (coverage/suppression) from ops KPIs in summary
- ☐ **Day 60:** Mid-pilot KPI review with same comparison structure
- ☐ **Day 90:** Final KPI review - full comparison vs baseline with comprehensive audit pack
- ☐ **Export pilot report:** Must show baseline → Day 30 → Day 60 → Day 90 trend lines mapped to KPI framework from Trust Pack. Final report aligned with KPI definitions in Trust & Pilot Pack
- ☐ Production plan or decommission per policy

-  Data return/destruction per BAA; archive final audit pack (CSV + PDF timelines) to site's secure location