Technical Dress Rehearsal

I. Goals & Summary

Technical Dress Rehearsal (TDR) gives the technical teams and application teams a chance to verify all end user devices are deployed and configured correctly for use with Epic. Successful TDR is key to a successful Epic go-live.

The technical team will complete testing to ensure all hardware function as expected during go-live, and will test configurations for devices that include:

- Epic access and wireless connectivity
- Workstation and login scenario setups
- Printers
- Peripherals (e.g. barcode scanners, document scanners, cameras, dictation devices)
- Business Continuity Access (BCA) application

Testing will be completed in the production environment and will involve physically testing all devices and technical configurations users will use after go-live, including: Epic access, printing configuration, and all peripheral device integrations. Testers will follow test scripts that verify specific workflows.

TDR for Epic Go-Live 3 for Queens, Lawrence, and the Medical Groups runs from April 5 – May 21, during which all end user devices will be tested. TDR is a validation exercise, and as such ALL deployments and inventory must be done prior to visiting a floor.

II. What to do before TDR

- **TDR Schedule** (located here [GL3 TDR Schedule](#))
  - Complete and maintain TDR Schedule for testing area
  - Assign TDR Lead to each location
  - Identify and work with clinical/operational contact to schedule date/time of visit
  - Determine # of devices to test and # of testers per area
  - Recommendation is to schedule during business hours in order for support resources to be available. In limited circumstances, off hours can also be coordinated, but is advised against. If off hours is an option that needs to be explored, please prepare to communicate reasoning to Epic/EpicTogether technical leads and executive leadership to see if it is doable.

- **Ensure Deployments & Inventory Are Updated**
  - Make sure have provided updated inventory/cartography to Epic/EpicTogether team, and notify TDR Project Leaders in case there are inventory changes at least 2 weeks ahead of scheduled TDR visit
  - Make sure all devices are labeled (workstations AND printers) with identifying information for the machine (hostname/asset tag for workstations, IP/printer queue/printer name for printers)
  - Make sure that any and all deployments have been completed (monitors, workstations, BCA, etc.) ahead of visit to TDR
  - Ensure BCA hardware and updated software has been deployed

- **Provide list of named testers and ensure they have appropriate access**
  - NYP CWID
  - Epic TDR Tester Access

- **Review TDR Scripts** (located here [TDR Scripts](#))
- **Freeze Devices!** (do not move devices once inventory is submitted and before TDR)

III. What to bring day of TDR visit

- Printouts of workstation inventory, printer inventory, and cartography of area
- Stickers to indicate if workstation & printer tests are completed
  - **Green** = all scripts passed
  - **Red** = at least one documented script fails
- Printout and bring TDR test scripts for testers to follow

IV. Issue Documentation and Resolution

1. **TDR Lead Responsibilities**
   - **Oversee TDR activities for assigned area(s)**
     - Complete and maintain TDR schedule
     - Estimate # workstations and time estimates for testing at each area
     - Estimate # resources/testers to complete testing
     - Identify clinical/operational contact to assist with scheduling and ensuring testers have access to all devices on visit
     - Provide list of named testers that will be taking part in testing activities
   - **Track TDR issues overall (both on ServiceNow and Epic Result Editor Issues List) and work on resolving issues to pass all workstation and devices prior to TDR’s end date of 1/15**
     - EpicTogether/Epic leads will be scheduling daily check ins for areas with TDR activities on each scheduled day. TDR Leads are expected to provide report out on progress, issues, and escalations as TDR activities are in full swing

2. **TDR Tester Responsibilities**
   - **Standard Epic Testing and Issue Reporting during TDR Script Tests**
     - Documentation Process:
       - Follow TDR scripts at each workstation
       - Document Pass and Fail in Epic TDR Result Editor
         - If Fail, document as much detail as possible in comments section
       - Click Submit to save changes
     - Issue Troubleshooting with T1:
       - If issue or script fails, you MUST call the T1 Support Desk at 212-746-4357 Option #8 to resolve issues.
       - If T1 does not pick up, you MUST submit a ServiceNow ticket
         - Login to [NYP SN](https://nyp.nysuny.edu), create Incident ticket, assign to "TDR Tier 1" assignment group (can find quickly by searching for "TDR" in assignment group search) and provide short description of the issue (e.g. device info, workstations to print to printer, model, ip address, etc.
           - TDR Leads assigned are expected to track incidents accordingly then hand off any specific Epic record build needs, mapping needs, or printer queue needs to NYP T1 via email or call
   - **Escalated issues to TDR Lead and/or Tier 1 if large scale issues are observed**
     - Process:
If notice all workstations are not mapped to right printer for one area or failing tests at large scale consistently, escalate this issue to TDR lead or Tier 1 group by calling 212-746-4357, Option #8

3. NYP T1 Support Responsibilities
   - Resolve basic Epic issues (record build, printer mapping, printer queue creation)
     - Process:
       - Work on resolving issue (workstation/printer record build, printer mapping, printer queue creation)
       - Be available on call and assist testers on phone
         - If cannot resolve on phone, create SN ticket
         - Monitor TDR T1 ticket queue and resolve ASAP
         - If cannot resolve issue, hand off ticket to “TDR Tier 2” Assignment group
       - Monitor TDR Result Editor Issue Queue in EPIC
         - Monitor TDR Issue Queue for issues and mark issues as “Resolved”
         - When issue is resolved, go into ticket and in the Result Editor, mark "Fixed"

4. EpicTogether P&W Responsibilities
   - Resolve advanced Epic issues (record build, printer mapping, printer queue creation)
     - Process:
       - Work on resolving issue (workstation/printer record build, printer mapping, printer queue creation)
       - Be available on call and assist testers on phone
         - If cannot resolve on phone, create SN ticket
         - Monitor TDR T1 ticket queue and resolve ASAP
       - Monitor TDR Result Editor Issue Queue in EPIC
         - Monitor TDR Issue Queue for issues and mark issues as “Resolved”
         - When issue is resolved, go into ticket and in the Result Editor, mark "Fixed"

V. TDR Follow Ups to Track
   - TDR Leads should ensure that any and all issues documented during testing are tracked, including:
     - Epic issues – follow up with T1, ensure Pass 2 is scheduled to retest failed scripts
     - Non-Epic issues – ensure SN tickets are created for issues such as inventory/cartography updates needed, deployments needed, and any login issues that may occur.
### VII. Summary of TDR Roles

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<th>Role</th>
<th>Responsibilities</th>
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| Project Leadership          | ‣ Manage and track TDR testing progress  
                                 ‣ Report progress to senior leadership  
                                 ‣ Identify and remove barriers                                                                                                                         |
| TDR Field Lead              | ‣ Coordinate TDR tester's schedules with command center and testing schedule to ensure coverage for both technical testers and application support analysts  
                                 ‣ Participate in daily scrum to inform project management and testers on hardware, department, and Epic issues  
                                 ‣ Provide support of both hardware and Epic for testers during testing  
                                 ‣ Confirm if ticket issues are hardware, software, or workflow related  
                                 ‣ Assign issues to correct group to fix                                                                                                                  |
| TDR Tester                  | ‣ Testing of Epic TDR following TDR scripts  
                                 ‣ Install printers, document scanners, bar code scanners, tap and go badge readers, electronic signature pads, and monitors all related to working with the Epic application |
| Tier 1 Support              | ‣ Resolve basic issues (workstation/printer record creation or modifications, printer queue creation via NOC)                                                                                            |
| EpicTogether P&W Analysts   | ‣ Provide specialty support for dedicated areas and issues that arise  
                                 ‣ Will be scheduled based on TDR test schedule                                                                                                         |