



Healthcare Systems Integration Readiness Checklist

A practical checklist for planning patient, payment, diagnostic, claims, accounting or reporting connections between healthcare systems.

Use this workbook to prepare an informed discussion, compare options and record evidence.

Prepared for hospitals, clinics and healthcare delivery teams

Plan the operating agreement first

An interface is only dependable when the systems and people involved agree what information moves, who owns it, how it is matched, what a useful status means and who resolves an exception. Complete this before committing to an integration scope.

Scenario and ownership

Choose one complete, valuable workflow to prove first.

- ☐ The trigger, records, receiving team and expected outcome are documented.
- ☐ Each important field has a named source system and business owner.
- ☐ Patient, encounter, order, payment or claim matching rules are agreed.
- ☐ The process owner knows what to do when information is delayed, missing or incorrect.

Technical and supplier readiness

Confirm capabilities and responsibilities rather than assuming an API guarantees a usable connection.

- ☐ API, file, portal or message capability has been confirmed with the relevant provider.
- ☐ Test environment, sample data, access route and support contacts are available.
- ☐ Authentication, permissions, logging and retry behaviour are understood.
- ☐ The integration approach includes a controlled release and rollback or recovery route.

Release and support readiness

Exception and reconciliation

The normal path is only part of the design. Make failures visible to someone who can act.

- ☐ Unmatched, duplicate, incomplete, delayed and cancelled events have a defined queue or report.
- ☐ Retry, correction, approval and communication responsibilities are named.
- ☐ Payment, claims, order, result or finance differences have a review cadence.
- ☐ Support teams can trace an event from source record through delivery and final status.

Acceptance and early-life review

Prove the connection with representative normal and exception cases before it becomes invisible infrastructure.

- ☐ Business and technical acceptance scenarios have been agreed.
- ☐ Users have practised their action when an interface issue affects their work.
- ☐ Operational monitoring and escalation is active before live volume begins.
- ☐ Early release evidence will be reviewed before further interfaces are added.