

KVANN FLOW — Tactical Roadmap

(Immediate Execution)

Version: 1.2.0 · **Date:** 2026-09-14 · **Owner:** Alexey

Supersedes (operationally, not historically): `2026-07-27\_WAVE2\_ROADMAP\_DRAFT.md` — see disposition note in §6

Scope: Today → CCC paid pilot + Oct 20 in-person proposal + accelerator submissions

Anchor dates: TODAY Mon 9/14 Zoom (Joe, Jaime, Alexey) · Oct 20 in-person proposal (2nd provider org)

0. Guiding Constraints (from founder input & agent synthesis, 2026-09-14)

1. **CCC pilot = Pareto scope.** Start with the simplest thing that hooks the client: Gravity Stacking + Lunch Firewall + TNA dashboard for 2–3 volunteer providers, staff-facing only. 80% of perceived value at 20% of effort. No patient-facing UI, no Pillar 1/3 in pilot.

2. Paid pilot pricing structure (DECIDED):

- **Pilot Package:** Fixed-Fee **\$3,500 – \$5,000 flat** for a 90-day pilot across 2–3 volunteer providers.
- **Annual Credit:** 100% of the pilot fee is credited toward their Year 1 subscription upon full rollout.
- **Post-Pilot Anchor:** Standard annual subscription at **\$149/MD/month**.
- **Satisfaction Clause & Refund Trigger:** Full refund upon written notice within 30 days if schedule density improvement is **<5% measured against the clinic's historical 30-day pre-pilot baseline**, or if volunteer providers veto clinical safety.

3. Assume CCC is on OCHIN-hosted Epic:

Consequence: OCHIN is a *gatekeeper*, not an option — CCC's executive sponsor (CIO/CMIO) must submit the integration through **CCC's established OCHIN change-control process**.

4. **CCC proposal goes out AFTER today's call**, aligned with Joe & Jaime.

5. **Zero pre-capital speculative hiring (DECIDED):** All Pre-Day-0 engineering remains 100% founder-led (assisted by OpenClaw and KIMI). Contract hires (10–15 hrs/wk QA/EHR specialist) are triggered strictly upon signed CCC MoU/BAA with sandbox credentials or accelerator SAFE funding receipt.

1. Track A — CCC Pilot Motion (This Week → ~Week 10)

When	Action	Owner	Notes
Today, pre-call	Review this roadmap + Jaime's SoW sample shape	All	Call agenda: pilot scope, pricing posture, who asks CCC about OCHIN
Today, on call	Decide: paid-pilot pricing posture; confirm Joe asks CCC about their Epic/OCHIN arrangement; assign proposal sign-off	All	3 decisions, then proposal writing starts
Days 1–3	Draft CCC Pilot Proposal (2–3 pp, SoW layout per Jaime's sample): pilot timeline, phased approach, CCC-side roles with **hour ranges** (CIO, COO, Epic Admin/OCHIN TC, PM, QA — 30–47 hrs total, keep it overview-level), success criteria ($\geq 5\%$ density gain over 30-day baseline), paid terms (\$3.5k–\$5k flat with 100% Year 1 credit + 30-day satisfaction clause)	Alexey (draft) → Jaime/Joe (review)	Source material: OneXQ CCC talking points + one-pager (July), WAVE2 §2 (phases & gates), vision doc ROI table
Days 4–5	Internal review → send to CCC	Jaime/Joe	Target: in CCC's hands by end of week
Weeks 2–4	CCC decision cycle; engage CCC CIO to submit initiative via OCHIN change-control	Joe + CCC CIO	OCHIN timeline confirmed in writing = hidden Day-0 prerequisite

	process **before** final contract signature (WAVE2 R-01 mitigation)		
Weeks 2–4	**Phase 0 Synthetic Data Calibration (pre-BAA):** If BAA takes >3 weeks, calibrate models using Kvann Flow synthetic AOM/Tryon fixture harness to demonstrate schedule simulation without exposing PHI	Alexey	De-risks clinical onboarding without HIPAA delays
Weeks 4–8	MoU → BAA → open.epic agreement → **Day 0**	Legal/Joe	Per WAVE2 Commercial Track (8–10 weeks total calendar)
Post-Day-0	Phases 1–4 per WAVE2 §2: Connect (wks 1–4) → Calibrate (5–9) → Validate (10–14) → Live pilot (15–20, 4-week run at one clinic)	Alexey + hires (contingent)	CCC IT effort: 30–47 hrs total — that number goes in the proposal

Contingency Tier (Read-Only / Recommendation Mode): If OCHIN change-control signals denial or >6-week delay, immediately activate the pre-designed contingency tier: staff export daily schedule reports (CSV), Kvann Flow generates optimized recommendations on the Tetris dashboard, and clinic staff adjust in Epic manually. Demonstrates immediate yield improvement without OCHIN write-back gatekeeping.

2. Track B — Engineering: Pilot-Credible Kvann Flow (Weeks 1–4, parallel)

Sequenced from WAVE2 Gate 1 checklist and updated against live codebase state (2026-09-14):

Wk	Item	Current Live State & Action
1	API key auth route-wide audit (P0)	`src/auth/api_key.py` in place; audit all active FastAPI routes for dependency injection
1	`SIMULATION_CAVEATS.md` published (P0)	Draft and commit to `docs/` and `_DEVELOPMENT/`
1	Honest pilot framing in all outward docs — no "completed Epic integration" claims (P0)	Applied across proposal and deck
2	Parameter reconciliation across config layers w/ provenance (P1)	Audit `src/config.py` vs simulator constants
2	Sprint 3 wiring verification + 10k-iteration validation run (P1)	Run automated verification harness
2	Epic mock client `src/ehr/mock_client.py` (P1) — enables offline demos & 80% of integration logic without OCHIN	High priority for demos
2–3	**Fix Epic sandbox blockers from July audit:** Implement JKU/JWKS endpoint (not static PEM) + complete scopes (Department, Location) (● critical findings)	Core blocker for open.epic conformance
3	Frontend type sync; production infra (Docker/Nginx/SSL, /health /ready) (P1)	FastAPI async engine & Alembic ready; wrap Dockerfile
4	Demo rehearsal: 10-min script, relative-mode-comparison narrative, "skeptical CIO" Q&A → **Gate 1: Engineering Ready**	Run rehearsal with team

Sprint 4 (realistic chronic demand): DEFER post-pilot (WAVE2 §7 recommendation stands) unless CCC explicitly demands MGMA-benchmarked absolute TNA. Ask that exact question at CCC's first technical review.

3. Track C — Accelerators (Weeks 2-4, Two-Tier Sequencing)

Recommendation on Joe's timing question: apply NOW, in parallel with CCC.

Cohort windows do not wait, and "pilot proposal in CCC's hands" is already a strong application narrative.

Tier	When	Action & Requirements
Tier 1 (Immediate)	Wk 2	Submit **Oregon Venture Fund** (Joe's Providence network; \$250k-\$1M) — pitch deck + executive summary; **zero website dependency**
Tier 1 (Immediate)	Wks 2-3	Submit **Microsoft for Startups Founders Hub** (non-dilutive; \$1k-\$5k Azure credits immediately, up to **\$150k Azure + M365 licenses** at Build tier) — requires EIN (spec J-2) + live website (Track D) + LinkedIn page; adjudication 3-5 business days
Tier 2 (Web-Ready)	Wks 3-4	Submit **Cedars-Sinai Accelerator+** (\$100k/~3% SAFE, Epic fast-track) — requires v0.1 single-page website live + deck
Tier 2 (Web-Ready)	Wks 3-4	Submit **Mayo Clinic Platform** (data lake for future Pillar 1 triage engine)
Non-Dilutive	Wk 4+	Optional: MedTech Innovator,

		MassChallenge HealthTech
Prerequisite	Wks 1-2	Pitch deck: Alexey builds 10-slide deck from Joe's existing PPT (Aug 28 action item) — hard prerequisite for Cedars-Sinai

4. Track D — Corporate, Brand Defense & Web Presence (Weeks 1-3)

Execution authority: `kvann\_workspace/2026-08-22\_KVAN Health LLC — Complete Formation & Grant Enablement Spec.docx` (hardened spec: Cloudflare RBAC, zero shared credentials, GitHub Pages deploy, \$110.44 total outlay). Track D rows below implement that spec; where wording differs, the spec wins on mechanics.

Dependency chain (strict order): Domains registered (Joe, spec J-4) → Cloudflare RBAC invite accepted (Alexey, A-1) → Email routing + SPF/DMARC/DNSSEC (A-2) → Landing page deploy on GitHub Pages (A-3) → LinkedIn company page (A-4) → Microsoft for Startups application (A-5, requires EIN + live website).

Wk	Action	Owner	Notes
Today (pre-call, ~5h sprint)	**Landing page v0.1 build:** single-page static site (problem: Swiss cheese + pajama time; product: 3 pillars, lead with Pillar 2; ROI table; team; pilot CTA; legal footer `© 2026 KVAN Health LLC`) Build & stage today; go-live blocked only on domain registration	Alexey	Parallel: produce call collateral (decision brief) — see §7
1	**Domain Defense:** Secure **BOTH `kvanhealth.com` and `kvannhealth.com` ** (Cloudflare Registrar,	Joe (spec J-4) / Jaime	Protects legal entity (`KVAN Health LLC`) and commercial brand (`Kvann Health`); decision item #3 on

~\$10.44/yr each) and
set up cross-redirects

today's call

1	Cloudflare RBAC: Joe invites Alexey as Administrator (zero shared credentials); deploy email routing — virtual aliases `alexey@ / joe@ / jaime@ / info@kvanhealth.com` → personal inboxes, plus SPF + DMARC + DNSSEC	Joe → Alexey (spec J-5, A-1, A-2)	Professional email at \$0 before M365 mailboxes unlock
1-2	Landing page go-live: GitHub Pages + CNAME + 4× apex A-records (proxied) + Full (Strict) SSL per spec A-3	Alexey	Unblocks Cedars-Sinai / Mayo (Track C Tier 2) and MS for Startups
2	LinkedIn company page (KVAN Health LLC), founders linked (spec A-4)	Alexey + Joe + Jaime	Required for MS Founders Hub sign-in
2-3	kvannhealth.com redirect live; both domains resolve to v0.1 page	Alexey	

5. Track E — Second Prospect (Oct 20, in-person)

Wk	Action
4-5	Reuse CCC proposal template → variant for this org (genericize CCC specifics)
5-6	Demo package: mock-client-driven live demo + Monte Carlo ROI walkthrough (proto

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Rehearsal with Joe + Jaime; leave-behind one-pager refresh (July OneXQ one-pager → Kvann Flow rebrand)

6. Disposition of Existing Roadmap Documents — Decision & Justification

****Decision:** KEEP the July WAVE documents unchanged as a dated snapshot; SUPERSEDE them operationally with this document (header reference added). Do NOT merge, do NOT rewrite, do NOT archive.**

Document	Disposition	Justification
`00.04/2026-07-27_WAVE2_ROADMAP_DRAFT.md` (OneXQ→CCC pilot roadmap, 550 lines)	**Keep as-is; supersede header only**	Its substance (phases, gates, budget \$212k expected, OCHIN risks, Sprint 4 deferral logic) remains ~85% valid and is cited by this roadmap. But it's OneXQ-branded, contains a July NO-GO verdict whose P0 items are partially resolved, and merging would rewrite an auditable point-in-time record. Surgical edits would falsify history; a rewrite would duplicate 550 lines. Cleanest: new tactical doc references it; add one "SUPERSEDED — see 2026-09-14 tactical roadmap" banner line at top.
`00.04/2026-07-27_WAVE1_AGENT_C_BUDGET_MODEL.md`	**Keep as-is**	Referenced by WAVE2; budget scenarios still the best model we have. Revisit only if Sprint 4 is triggered or hires change.
`00.04/cost_estimation.md`,	**Keep as-is**	Supporting artifacts of the same

`timeline_for_pilot_from_Day0.md`		wave; consistent with WAVE2.
`20.04/... AGENT_A_TECHNICAL_GAPS.md `, `20.02/... AGENT_B_EPIC_INTEGRATION_P ATH.md`	**Keep; verify item-by-item in Track B**	These are checklists, not roadmaps; Track B §2 consumes them directly.
Sprint plans in `40_SPRINTS/`	**Keep (historical)**	Completed-sprint records; not roadmap material.

Why not one merged mega-roadmap: the two roadmaps have different audiences and decay rates.

The strategic roadmap (`kvann\_workspace/KVANN\_HEALTH\_LONGTERM\_ROADMAP.md`) is board/investor-facing,

changes quarterly. This tactical doc is operator-facing, changes weekly. Merging couples a stable

document to a volatile one and guarantees the stable one rots.

7. This Week at a Glance

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Mon 9/14 PRE-CALL (5h): Alexey builds landing page v0.1 + call decision brief (§7 below)

Mon 9/14 Zoom call: 4 decisions (pricing posture / OCHIN question to CCC / proposal sign-off / domain registration go)

Tue–Thu Draft CCC proposal (Track A) + verify Gate-1 P0 items (Track B)

Fri Proposal to Joe/Jaime for review; landing page go-live once domains registered

Next wk Proposal out → OVF application → email routing + LinkedIn → Cedars-Sinai/Mayo + MS Founders Hub once site live

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8. Strategic Decisions Log (Consensus Reached 2026-09-14)

1. **Pilot Pricing Structure:** Decided on a **Fixed-Fee Pilot Package (\$3,500 – \$5,000 for 90 days, 2–3 MDs)** with a **100% credit** toward the Year 1 annual subscription (\$149/MD/month) upon full rollout, backed by a **30-day satisfaction clause** (refund triggered if density gain is <5% vs. pre-pilot 30-day baseline). No blank placeholders.

2. **Hiring Gating:** Decided **against pre-funding speculative hiring**. Alexey leads engineering via OpenClaw/KIMI. First hire (part-time QA/EHR contractor, 10–15 hrs/wk) is gated strictly on either a signed CCC MoU/BAA with sandbox access or closed accelerator SAFE capital (\$100k+).

3. **Dual Domain Registration:** Jaime/Joe to secure **both `kvanhealth.com` and `kvannhealth.com`** immediately to protect Oregon entity identity and commercial product branding.

4. **Landing Page Fast-Track (added v1.2.0):** Landing page v0.1 is promoted from a Week 2–3 item to a **today (pre-call) founder sprint** by Alexey, because it is the hard gate for Cedars-Sinai, Mayo, and Microsoft for Startups (up to \$150k non-dilutive Azure credits). Execution mechanics follow the hardened 2026-08-22 Formation & Grant Enablement Spec (Cloudflare RBAC, GitHub Pages, SPF/DMARC/DNSSEC); go-live is blocked only on domain registration, which is decision #4 on today's call.