BA TOOLKIT · TEMPLATE

UAT Plan Template

Entry and exit criteria, roles, schedule, test cases, defect rules and sign-off. A plan you can copy, fill in and get signed before the first test runs.

User acceptance testing | Entry & exit criteria | Defect severity | Sign-off

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Business Analyst · Requirements, SQL data validation, UAT

Free download: github.com/prachitparikh/ba-toolkit

How to use this template

Most UAT pain comes from unclear entry and exit criteria, not from testing itself. This template makes you settle those decisions up front, while there's still time to argue about them.

Replace everything in [brackets]. Keep the example rows until you've written your own, so testers can see the expected format. Store the plan next to your requirements and update it when decisions change. A plan that drifts from reality is worse than none.

Item	Detail
Project	*[Name and release or wave]*
Document owner	*[BA name]*
Business sign-off owner	*[Name, role]*
Version / date	*[v0.1, YYYY-MM-DD]*
Status	*[Draft / In review / Approved]*

1 Purpose

[One paragraph: what business change is being tested and why UAT matters for this release.]

> **Example:** "Confirm the new order-to-cash process lets the credit team hold, review and release orders correctly before go-live on 15 March."

2 Scope

In scope

#	Business process / feature	Requirement IDs
1	*[Create and submit sales order]*	*[REQ-001 to REQ-012]*
2	*[ ]*	*[ ]*

Out of scope

- [ ] [Performance testing, done separately by IT]
- [ ] [Legacy report X, retired at go-live]

3 Entry criteria

UAT starts only when all of these are true.

- [ ] SIT complete with no open Critical or High defects
- [ ] UAT environment refreshed with masked production-like data on [date]
- [ ] Test scripts reviewed and approved by business owners
- [ ] Testers have access and have completed a 30-minute walkthrough
- [ ] Data validation checks run and passed (see the SQL checks in this toolkit)

4 Exit criteria

UAT is done only when all of these are true.

- [ ] 100% of in-scope test cases executed
- [ ] At least [95]% passed, and every failure has a logged defect
- [ ] No open Critical or High defects; Medium defects have an agreed workaround and fix date
- [ ] Traceability matrix updated: every requirement linked to a passed test
- [ ] Business sign-off obtained in writing

> **Why this matters:** if nobody agreed what "done" means before testing, sign-off turns into a negotiation at the worst possible moment. Write the numbers down now.

5 Roles

Role	Name	Responsibility
UAT lead / BA	*[Name]*	Plan, scripts, daily status, defect triage
Business testers	*[Names]*	Execute scripts, log results and defects
Business owner	*[Name]*	Decide severity disputes, final sign-off
Dev / support	*[Names]*	Fix defects, redeploy, environment support

6 Schedule

Phase	Dates	Notes
Script review	*[dates]*	
Cycle 1	*[dates]*	Full scope
Fix and retest	*[dates]*	
Cycle 2 (regression)	*[dates]*	Critical paths only
Sign-off	*[date]*	

7 Test cases

TC ID	Req.	Scenario	Steps	Expected result	Tester	Status
TC-001	REQ-004	Order over credit limit is held	1. Create order for customer C100 with $60,000 value. 2. Submit.	Order status = HOLD; credit team notified within 5 minutes	*[Name]*	*[Not run]*
TC-002						

8 Defect management

Severity	Definition	Target fix
Critical	Blocks a core business process, no workaround	Same day
High	Core process works only with a painful workaround	2 business days
Medium	Non-core issue with a reasonable workaround	Before go-live or agreed date
Low	Cosmetic	Backlog

- [ ] Daily triage at [time] with BA, business owner and dev lead
- [ ] Every defect needs steps, expected vs actual result, a screenshot or query, and the linked requirement

9 Risks and assumptions

Risk	Impact	Mitigation
[Testers pulled into month-end close]	*[Cycle slips]*	*[Book testers now; backup tester per process]*

10 Sign-off

Name	Role	Decision	Date
[Name]	Business owner	*[Approved / Approved with conditions / Rejected]*	*[date]*

About Prachit Parikh

Prachit Parikh is a business analyst. Most of his work sits where requirements, data and testing meet.

He takes what stakeholders say they need and turns it into requirements and user stories a team can build and test. Each one has acceptance criteria and a clear line to the test that proves it. He checks the data behind them in SQL and Excel, builds reports in Power BI, and plans UAT so a change goes live the way the business expected.

He was a business analyst at Banking Circle, working on data validation, traceability and UAT planning. Before that he worked in customer care at Elevance Health and did business systems analysis on an employee portal and an inventory system at Saklax Manufacturing.

He writes about AI, data and the future of business analysis, and makes short animated explainer videos on YouTube.

Related reading

1. What a good UAT plan actually looks like (Substack)
2. 7 SQL checks I run before UAT sign-off (Dev.to)
3. Data mapping document template (Hashnode)

> Spotted a gap or have a template that saved a project? Open an issue or pull request on the toolkit repo. Real-world examples (anonymized) are welcome.

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