PRACTICE OPERATIONS / WORKSHEET

Screening workflow change review

Use this review after the clinical lead has approved a pathway change. Complete it with the scheduler and someone who performs the affected work.

01 Define the approved change

Review reference / site

Proposed effective date

What changes? Name the affected visit categories and session types.

Clinical approval owner / role

Operations review owner / role

02 Map the work that moves

List preparation, testing, room turnover and coordination. Record where each task goes and the skill needed to cover it.

Task 1 / current timing and site

Proposed timing, site and required competency

Task 2 / current timing and site

Proposed timing, site and required competency

PRACTICE OPERATIONS / WORKSHEET

Screening workflow change review

Review one affected site and half-day at a time. Record local observations before treating a lower visit count as available capacity.

03 Check the proposed coverage

Site / provider session / review period

Who can cover the work? Record competencies, availability and supervision.

What could prevent the plan working? Include room, travel or hour limits.

04 Agree what to observe and who decides

Measure + collection method + owner (e.g., observed task minutes per session)

Review trigger + escalation owner + review date

Coverage decision

- [ ] Retain current plan
- [ ] Test proposed plan
- [ ] Collect more evidence

Planning aid. Clinical protocols and staffing approval stay with your practice.