Healthcare Workflow
Clarity Worksheet

Name the gap, map the handoffs, and choose one clear next move.

KEEP PRIVATE INFORMATION OUT

Do not enter PHI, patient names, passwords, account details, or confidential employee records.

1 · NAME THE WORKFLOW GAP

What is happening now that should be clearer, safer, faster, or more consistent?

Who experiences the problem, and what does it make harder for them to do?

What result should this workflow reliably produce?

2 · DEFINE THE NORMAL PATH

Trigger	First owner	Completion proof

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Map the handoffs. *Test the exceptions.*

3 · MAP THE CURRENT HANDOFFS

Step or decision	Owner	Handoff / record

4 · TEST THE EXCEPTIONS

What happens when information is missing?

What happens when the owner is unavailable or the situation becomes urgent?

5 · CHOOSE ONE CLEAR NEXT MOVE

One decision or action	Owner	Due date

CLOSE THE LOOP

Schedule the review. Confirm what changed. Update the official workflow, job aid, and training together.
This worksheet does not replace legal, clinical, billing, or compliance review.

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