

# Practice Documentation Readiness Starter

A free working file to see what your practice already has, who owns it,  
and what needs a date.

# How to use it

Use it on one real practice, service line, or location. It gives you a documentation snapshot, a register, and a seven-day sequence you can start today.

- Choose one practice or location. Do not try to rebuild everything at once.
- Work from documents you already have. Leave a field blank if you do not know the answer.
- Use the snapshot to find the missing owner, missing date, or missing record.
- Use the register to make one gap visible and assign the next step.

## Start with these three fields

Practice or location

Person completing this starter

Date started

### 1. Readiness snapshot

Mark the current state of each system. A blank is useful information. It is better than an assumption with no owner or review date.

| SYSTEM                                          | EXISTS                       |                             | OWNER NAMED                  |                             | REVIEW DATE                  |                             | NEEDS ATTENTION |
|-------------------------------------------------|------------------------------|-----------------------------|------------------------------|-----------------------------|------------------------------|-----------------------------|-----------------|
| Governance and accountable prescriber record    | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                 |
| Jurisdiction verification trail                 | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                 |
| Intake, evaluation and consent record structure | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                 |
| Encounter record and traceability               | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                 |
| Emergency documentation and drill record        | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                 |
| Staff onboarding and competency records         | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                 |
| Review calendar and change log                  | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No |                 |

A document with no named owner is hard to keep current. A document with no review date is a snapshot, not a maintained system. A row marked yes with no source or sign-off may be a belief rather than a record.

[illegible]

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### 3. Your next seven days

Choose one gap. The point is not to finish a binder in a weekend. The point is to turn one invisible gap into an owned record.

| WHEN  | ACTION                                                                                                              | DONE (DATE, INITIALS) |
|-------|---------------------------------------------------------------------------------------------------------------------|-----------------------|
| Day 1 | Circle one snapshot row that needs attention.                                                                       |                       |
| Day 2 | Name the person responsible for moving it forward.                                                                  |                       |
| Day 3 | Collect the current practice document or the official source you need to review.                                    |                       |
| Day 4 | Write down what is missing: a field, a sign-off, a source, an owner, or a date.                                     |                       |
| Day 5 | Complete or revise the document with the right decision-maker. Clinical content goes to the accountable prescriber. |                       |
| Day 6 | Record the date, owner, and next review date in the register.                                                       |                       |
| Day 7 | Choose the next gap. Stop after one clear next step.                                                                |                       |

### Where to go next

- Free regulator directory for every US state, Canada, the UK and Australia: [scope-and-standard.com/regulators](https://scope-and-standard.com/regulators)
- Free Jurisdiction Verification sheet: [scope-and-standard.com/verify](https://scope-and-standard.com/verify)
- Guides on supervision, delegation, emergency records and charting: [scope-and-standard.com/guides](https://scope-and-standard.com/guides)

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