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Access + Workflow Improvement Audit

A quick improvement tool for healthcare teams that want to reduce friction, improve handoffs, and strengthen continuity of care.

Use this as a quick provider/clinic improvement tool. It helps teams identify friction points that affect access, experience, burnout, and continuity of care.

Quick Access + Workflow Audit

Score each area from 1 to 5. A score of 1 means the process is unclear or unreliable. A score of 5 means the process is clear, consistent, and working well.

Area	What Good Looks Like	Score
Patient access	Patients can reach the right person and get clear next steps.	1 2 3 4 5
Medication clarity	Patients understand medication changes, cost options, and who to call.	1 2 3 4 5
Handoff reliability	Referrals, labs, records, and follow-ups are not dropped.	1 2 3 4 5
Team workload	The workload is visible, balanced, and realistic.	1 2 3 4 5
Role clarity	Everyone knows what they own and what they do not own.	1 2 3 4 5
Communication	Patients and staff receive consistent, timely updates.	1 2 3 4 5

Top 3 Friction Points

1.

2.

3.

Root Cause Prompts

- Is this a people problem, process problem, technology problem, policy problem, or capacity problem?
- Where does the delay, confusion, or rework begin?
- What information is missing at the handoff?
- Who gets interrupted because the process is unclear?
- What does the patient experience when this breaks down?

30-Day Improvement Sprint

Improvement	Why It Matters	Owner	Due Date	Status

Simple Success Measures

- ☐ Fewer patient call-backs for the same issue.
- ☐ Fewer medication access delays.
- ☐ Shorter time from request to next step.
- ☐ Clearer ownership of referrals, records, or follow-ups.
- ☐ Improved staff confidence in the process.
- ☐ Reduced rework, duplication, and preventable frustration.

Improvement rule: Do not make the process more complicated than the problem. Pick one friction point, one owner, one next step, and one due date.

Important: Education and leadership support only. This resource does not provide medical care, legal advice, compliance advice, diagnosis, treatment, or individualized clinical guidance. Healthcare organizations should follow applicable laws, licensure requirements, policies, and professional standards.