

Physician Workflow Mapping Checklist

Map one administrative workflow before selecting AI, automation, or new software.

IMPORTANT Do not record patient names, symptoms, diagnoses, medical records, passwords, or protected health information in this worksheet.

1. Define the workflow

CHECK	NOTES / DECISION
☐ Name and objective	What operational outcome should improve?
☐ Trigger	What event starts the workflow?
☐ End state	What must be true for the workflow to be complete?
☐ Volume	How often does it run in a typical week or month?

2. Map the current state

CHECK	NOTES / DECISION
☐ Inputs and channels	List the non-sensitive information and systems used.
☐ Steps and decisions	Record the sequence, decision points, and exceptions.
☐ Ownership	Name a role for every handoff and approval.
☐ Failure modes	Where is work delayed, duplicated, lost, or reworked?

3. Design the future state

CHECK	NOTES / DECISION
☐ AI suitability	What may be prepared, summarized, classified, or organized?
☐ Human review	What must be approved before use or communication?
☐ Escalation	What conditions stop automation and require an authorized person?
☐ Success measure	Choose a baseline and target: time, completion, rework, adoption, or exceptions.

Human review checkpoint

Name the person responsible for approving the workflow, reviewing exceptions, and deciding when professional, legal, privacy, security, or clinical escalation is required.

This resource provides general administrative guidance. It is not medical, legal, privacy, cybersecurity, financial, or regulatory advice.