

Clinic workload and capacity review

Plan one week using distinct time categories, then review staff, room and schedule constraints. therapycrm.io

Paid hours Protected hours / reasons Reviewer role / date

Use minutes consistently. Record duties once: a timed block and its component tasks must not both count. Keep missing inputs and separately observed outside-hours work visible.

Duty inventory: no client names or clinical records

Duty ref	Duty description	Count	Minutes each	Total minutes	Evidence / assumption / unknown

Available duty minutes Listed duty minutes Remaining / gap minutes

Actual outside-hours observation, if recorded; duration and source

Available duty time is paid time minus the protected blocks defined above. A forecast gap does not prove actual outside-hours work. Clinical and staffing decisions remain with the responsible professionals.

Visit minutes

Documentation minutes

Room turnover minutes

Constraint	Baseline input	Proposed input	Evidence / unresolved question

Consider service eligibility, clinician windows, protected time, eligible rooms, turnover and family availability. A pooled capacity ceiling is not a feasible appointment schedule.

Issue / scenario ref	Action	Owner / due date	Recheck evidence / outcome

Useful companion tools: therapist workload audit, clinic capacity planner and schedule feasibility checker at therapycrm.io/tools. Use aggregate business values; retain individual records in the clinic's approved system.