

Define a review cycle, keep unknown statuses visible and assign follow-up with evidence.

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Reviewer role

Sample selection method

Define each item before review. Record complete, incomplete, not reviewed, not applicable with a reason, or missing entry. These are organizational states, not a compliance score.

Item ref	Evidence question	Evidence to inspect	Applicability rule	Source / version / scope

Defined item count

Expected record-item pairs

Expected pairs = entered records × defined items. Use references without names on this sheet. Keep actual clinical content and the link to identifiable records in a practice-approved system.

Status register and administrative SOP

Use the same references and preserve the original cycle

Record / item ref	State	Reason / evidence ref	Reviewer / date	Recheck ref

SOP purpose, trigger, permitted inputs and responsible role

Ordered steps and evidence that each handoff is complete

Exception / escalation route; document version and review owner

Finding, action and verified closure

Finding ref	Action / owner / due	Evidence / recheck	Closure / carry-forward reason

Preserve not-reviewed and missing entries. Completion of a follow-up task and verification of the evidence are separate events. This worksheet supplies no clinical, legal, retention, payer or certification requirements.