

Proposer Identifies Need



Sponsoring Group ¹ is convened to Establish Directive, Delegation or Practice



Sponsoring Group Completes Proposal ²:

1. Conducts Performance Readiness Assessment (*Performance Readiness Assessment available*)
2. Establishes authorizing mechanism as necessary (*Medical Directive and Delegation templates available*)
3. Address competence attainment needs as necessary (*Performance Readiness Plan available*)



Sponsoring Group Submits Proposal for Approval to:

- Approving physicians or authorizers ³
- Implementers ⁴
- Relevant administrative authorities and committees



Upon Approval, Sponsoring Group Activates Directive, Delegation or Practice:

- Implements education if necessary
- Informs stakeholders of activation date and relevant information
- Activates practice



Sponsoring Group Reviews and Submits Practice for Renewal on an Emergent and Routine Basis to Assure Ongoing Appropriateness

¹ A sponsoring group may include representatives of physicians and authorizers, implementers, including co-implementers and relevant administrative staff.

² In corporate multi-professional settings, completing a proposal in writing using the templates or setting-specific documentation is highly recommended to fulfill multiple accountabilities and ensure appropriate care.

³ All physicians or authorizers responsible for patients who may receive the procedure under authority of a directive must approve it. Only physicians or authorizers who, by virtue of their role could potentially have a relationship with recipient patients can approve it. For strategies to facilitate sign off, particularly in larger settings with multiple authorizers, see the Approving Physician(s) or Authorizer(s) section of the [Medical Directive and/or Delegation instructions](#).

⁴ Implementers may indicate approval in a number of ways. They may simply implement the directive, delegation or practice, thereby indicating approval, or they may sign off prior to implementation by using an [Implementer Approval Form](#) or the like. Another option, particularly with large groups of implementers, is to have representative implementers sign off directly using an [Implementer Approval Form](#), with all implementers signing off upon completion of performance readiness training using an [Implementer Performance Readiness Form – Individual or Group](#).