

Precondition 1 – Assure Performance Readiness

Performance Readiness Assessment

- Used to determine whether it is appropriate to establish a directive, delegation or practice beyond principal expectations by addressing the overall question:

Do the authorizers and implementers have the necessary competencies to authorize and perform the procedure and manage the outcomes given the patient's condition, needs and all the circumstances in the situation?

Performance Readiness Plan

- Used to plan and identify how implementers achieve performance readiness; primarily for delegated acts and for practices beyond principal expectations when more extensive education is necessary to achieve competence.

Precondition 2 – Assure Authority

Medical Directive &/or Delegation Template

- Used by authorizers with ordering authority and implementers to establish a directive &/or delegation.

Delegation Template

- Used by non-ordering authorizers (i.e. those who do not have legislative ordering authority) and implementers to establish a delegation.

Supporting Documents

- **Approval Forms.** Used as an appendix to a directive or delegation. There are 2 types:
 - **Authorizer Approval Forms.** Used when there are multiple approving physicians or authorizers.
 - **Implementer Approval Form.** Used to enable implementers to sign off on a directive or delegation ¹.
- **Implementer Performance Readiness Forms** – Used as an appendix to a directive or delegation, or to serve as a record. There are 2 types:
 - **Individual.** Used to indicate performance readiness of one implementer or an implementer who is a designated educator. It may also be used as written record of authorization if delegation is conferred by a verbal order.
 - **Group.** Used to indicate performance readiness of each implementer where there are multiple implementers.
- **Order Table Form** – Used as an appendix to a directive to facilitate working with a series of orders contained in it.
- **Recommended Format For A Prescription or Requisition Completed Pursuant To A Directive** – Used as an appendix to a directive to identify how an implementer completes a prescription or requisition for diagnostic imaging or laboratory specimen collection and testing to indicate it is a proper physician's or authorizer's order.

Precondition 3 – Assure Clinical Appropriateness

Clinical appropriateness is determined in principle during the performance readiness assessment phase, and then in each situation where the directive, delegation or practice is implemented.

¹ Implementers may indicate approval by signing off on an approval form, or alternatively by simply implementing the directive or delegation.