Healthcare Administrative Operations

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Purpose

Coordinate invented nonclinical access, scheduling, staffing and administrative handoffs. Five SOPs and four templates turn task signals into accountable next actions.

Boundary

Fictional portfolio demonstration only. No patient records, clinical advice, triage, eligibility determination or regulatory certification. Use invented references without actual personal information. These procedures do not configure appointment systems, message patients or authorize real healthcare activity.

Operating roles

Access Lead owns intake coordination. Scheduling Lead verifies administrative dependencies. Workforce Coordinator reviews mock coverage. Administrative Reviewer accepts handoffs. Finance Reviewer reconciles synthetic costs. The sending role retains ownership until the receiving role accepts.

Cadence and control

Review source freshness, Stuck work and missing evidence each cycle. Review dependencies and matched costs weekly. Mock owner: Administrative Operations Lead. Reassess this pack when fields, logic or procedures change; keep a version and reviewer record.

Metric Dictionary

Use the task dashboard to coordinate work, not to infer care outcomes.

Task metrics

Open = total DEMO | tasks minus Done. Completion = Done / total, rounded. Needs attention counts Stuck tasks only; overdue tasks require a separate due-date review. These are coordination measures, not proof of a service outcome.

Financial measures

Reported budget and spend sum known amounts and disclose missing values. Comparable utilization = matched spend / matched budget; only rows with both values enter the matched set. Matched remaining budget = matched budget minus matched spend. Unknown is not zero. The general task display currently falls back to 0% when matched budget is zero; treat this as an undefined ratio, not evidence of efficiency.

Charts and dates

Workstream progress shows the three largest groups by task count. Cost comparison shows the three largest by reported budget. Upcoming work counts task due dates in six weeks from Monday of the current UTC week, including Done tasks. Undated and out-of-window records are excluded. This is a due-date distribution, not a historical trend or capacity forecast.

Completeness

Required task fields: Status, Workstream, Next Action, Due Date, Budget and Actual Spend. Presence does not prove acceptance or accuracy. Keep 20-30 unarchived DEMO tasks, at least six open and 2-4 labeled demonstration gaps per board. Do not reopen Done work or infer missing amounts.

Refresh discipline

Inspect schemas, current values, recent activity and DEMO CYCLE date/slot markers. Advance 2-3 eligible tasks; resolve one missing field while preserving deliberate gaps. Create at most one task per board per local day. Read back writes, run the existing Make publisher once, inspect pending execution IDs and retry failed syncs without repeating successful board writes.

Proposed measures

Appointment access times, no-show rates, utilization, staffing capacity, care outcomes and billing accuracy require separate records and defined denominators. None is calculated from these task rows.

SOP 01 Intake Readiness

Owner: Access Lead

Trigger and inputs

A DEMO intake workflow task is created or returned. Use a fictional request reference, scope, service window, routing criteria and receiving-role expectations.

1 Define scope

Record the administrative workflow and intended handoff. Separate coordination work from actual patient decisions. Give the task an owner and evidence-based next action.

2 Check evidence

Confirm the mock checklist version and required administrative inputs. Identify missing information explicitly; do not invent an identity, clinical fact or completed check.

3 Route the exception

Document the missing input and the role responsible for supplying it. Use Stuck only when the task cannot progress; a blank alone is not a clinical risk classification.

4 Review acceptance

Have the Administrative Reviewer record Accepted or Returned in the mock log, with reasons and remaining dependencies.

5 Close the coordination task

Mark Done only after acceptance and required fields are present. Preserve open downstream work as separate tasks; task closure does not show that anyone received care.

Exception

Missing receiving-role acceptance prevents closure. Escalate only within the fictional operating model.

Completion evidence

Checklist version, evidence references, decision, receiving role and next owner/action/date.

Dashboard connection

Intake workstream, task status, due dates and data gaps.

SOP 02 Scheduling and Confirmation Handoff

Owner: Scheduling Lead

Trigger and inputs

A mock scheduling process or appointment-confirmation improvement is ready for review. Inputs: invented service window, dependencies, communication template and acceptance criteria.

1 Map dependencies

List the administrative prerequisite tasks and responsible roles. Confirm the due date is a task deadline, not an actual appointment.

2 Verify confirmation logic

Review a fictional example against agreed rules. Record what information is required and how exceptions are routed. Do not send a real message.

3 Resolve conflicts

Record a mock conflict, its decision owner and the next review. A task count cannot determine appointment availability.

4 Accept the handoff

Receiving role checks the checklist and template, then records acceptance or rework. The sender remains accountable until acceptance.

5 Reconcile records

Update next action and supported synthetic spend. Close only the accepted administrative task with all fields present.

Exception

A missing confirmation result stays unknown. It is not a confirmed appointment or a no-show.

Completion evidence

Dependency list, template version, fictional test result, acceptance and remaining actions.

Dashboard connection

Scheduling task progress and due-date distribution; no appointment or no-show denominator.

SOP 03 Administrative Coverage Review

Owner: Workforce Coordinator

Trigger and inputs

A mock service-window coverage task or administrative staffing exception needs review. Inputs: invented responsibilities, required skills, availability assumptions and dependency log.

1 Define the requirement

Describe the administrative roles needed for the sample window and the work each role owns. Do not infer actual staffing from task totals.

2 Compare mock availability

Use a separate invented coverage worksheet. Keep missing availability or training evidence blank and identify the evidence owner.

3 Prioritize the exception

Record the affected administrative handoff, proposed response and decision owner. Avoid clinical severity classifications.

4 Record the decision

The Administrative Operations Lead approves or returns the mock plan. State its assumptions and residual gaps.

5 Verify follow-through

Confirm acceptance evidence before task closure. Keep unresolved actions open with a next action and date.

Exception

Missing availability prevents an asserted coverage result; completion percentage is not staffing capacity.

Completion evidence

Requirement, availability assumptions, gap, reviewer decision and receiving-role acceptance.

Dashboard connection

Workforce workstream and task gaps; utilization and capacity need additional sources.

SOP 04 Administrative Quality and Escalation

Owner: Administrative Reviewer

Trigger and inputs

A mock checklist defect, incomplete handoff or recurring administrative issue appears. Inputs: invented evidence, checklist version, impact statement and acceptance rule.

1 Record the issue

Separate observed evidence from assumptions. Use an invented reference and capture the administrative consequence.

2 Assign ownership

Name the fixing role, reviewer, next action and review date. Label intentionally incomplete rows as demonstration examples.

3 Review correction

Compare the revised mock artifact with the stated acceptance rule. Preserve the original decision history in the log.

4 Escalate unresolved work

Route a blocked administrative task to its mock decision owner. Do not imply that the dashboard supplies clinical escalation or compliance assessment.

5 Accept or return

Record the reviewer outcome and reopen no completed task. Use a new linked follow-up task if later fictional work is necessary.

Exception

An absent review result prevents closure. Presence of a checklist does not establish legal or clinical compliance.

Completion evidence

Issue reference, artifact version, correction evidence, reviewer outcome and follow-up.

Dashboard connection

Stuck tasks, next actions and completeness; no automated severity or SLA calculation.

SOP 05 Administrative Budget and Scope Review

Owner: Finance Reviewer

Trigger and inputs

A weekly mock cost review, scope change or allocation gap appears. Inputs: known budget/spend, covered scope, synthetic cost evidence and separate remaining-cost estimates.

1 Confirm cost basis

State the scope, period and categories covered by each amount. Separate commitments from actual spend.

2 Match known pairs

Use only tasks with both budget and spend for utilization and remaining budget. Disclose excluded rows and preserve blanks.

3 Explain variance

Describe budget less spend and unfinished work. An underspend can reflect missing cost evidence or incomplete scope.

4 Review assumptions

Use a separately evidenced estimate for a forward cost view. Open-task budget is not an estimate to complete.

5 Record action

Agree a mock scope/allocation decision, owner and review date; read back any task changes before reporting success.

Exception

A zero matched budget has no meaningful utilization ratio. Never replace an unknown amount with zero.

Completion evidence

Cost basis, known pairs, excluded rows, decision and review owner/date.

Dashboard connection

Matched budget/spend; no reimbursement, margin or cost-to-complete forecast.

Working Templates

Copy into a fictional operating log. Do not insert actual patient, client or site information.

Readiness record

Reference: ____ | Scope/version: ____ | Required evidence: ____ | Supplied/missing: ____ | Dependencies: ____ | Review outcome and rationale: ____ | Reviewer: ____ | Next owner/action/date: ____

Handoff acceptance

Sending role: ____ | Receiving role: ____ | Included scope: ____ | Evidence/version: ____ | Exceptions: ____ | Accepted/Returned and reason: ____ | Acceptance date: ____ | Remaining actions: ____

Exception and decision log

Issue: ____ | Observed evidence: ____ | Assumptions/unknowns: ____ | Affected tasks: ____ | Decision owner: ____ | Decision and reason: ____ | Required evidence: ____ | Next review: ____

Matched-cost worksheet

Task: ____ | Cost basis/period: ____ | Budget: ____ | Spend: ____ | Both known?: ____ | Matched remaining: ____ | Missing evidence: ____ | Separate remaining-cost estimate: ____ | Review owner/date: ____

Worked cost example

Task A has $50,000 budget and $32,000 spend; Task B has $20,000 budget and unknown spend. Reported budget is $70,000; reported spend is $32,000 with one missing-spend row. Matched utilization is 64%, and matched remaining is $18,000. Task B is excluded from matched ratios. A separate $22,000 remaining-cost estimate for A produces $54,000 estimated final cost; the dashboard does not supply that estimate.

Closure example

A mock administrative handoff has complete fields but no receiving-role acknowledgment. Keep it open. A reviewer may complete an administrative review with a documented Hold, while the underlying blocked work remains open. Never equate a review outcome with real-world authorization.