

Portfolio Pathway audit closing-the-loop worksheet

Use this to plan one audit project that can stand up as Portfolio Pathway evidence: clear standard, baseline data, action, follow-up and reflection.

Page 1 - Audit planning map

Area	Prompt	Your notes
Topic	What clinical, safety or service issue are you auditing?	
Standard	Which guideline, College standard, NICE guidance, local policy or benchmark are you measuring against?	
Scope	Which patients, dates, clinic, ward, list, reports, samples or cases are included?	
Baseline	What data will you collect and who will check the accuracy?	
Gap	What result would show the service is not meeting the standard?	
Your role	What exactly will you lead, design, analyse, present or implement?	

Closing-the-loop action plan

Action	Owner	Deadline	Evidence to keep
Change 1			
Change 2			
Change 3			
Re-audit / follow-up date			

Page 2 - Evidence pack and reflection prompts

A strong audit pack should let an evaluator understand the project in minutes. Do not upload a poster or certificate on its own.

Evidence pack checklist

- Audit proposal or registration, including topic, setting and standard.
- Baseline data summary with sample, dates, method and key findings.
- Role statement explaining exactly what you personally did.
- Action plan with named owners, deadlines and governance route.
- Implementation proof: minutes, email trail, pathway update, teaching, checklist or template change.
- Re-audit or follow-up evidence, or a clear planned date if re-measurement is pending.
- Presentation, governance discussion, M&M; output or departmental sign-off.
- Short reflection linking learning, patient care, team working and future practice.

Reflection prompts

Prompt	Your notes
Why did this audit matter to patient care, safety or service quality?	
What was your specific role, and what was done by others?	
What did baseline data show and what limitation should you acknowledge?	
What changed after the action plan?	
What did re-audit or implementation evidence show?	
What will you do differently in your own practice or leadership?	

Final test before upload

- The standard is explicit and defensible.
- The project is recent enough for my application strategy.
- My role is clear and not overclaimed.
- There is proof of action, not only proof of measurement.
- The reflection explains learning and next steps, not just what happened.

Rule of thumb: if the audit only proves you collected data, it is weak. If it proves you measured, changed, checked and learned, it becomes useful Portfolio Pathway evidence.