Definition of Healthcare Decision-Making Support Tools

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Clinical Guidelines:

Evidence-based recommendations to standardise care, improve quality, and guide management of conditions and procedures
(e.g., SIGN guidelines for managing asthma)

Policy:

Organisational rules guiding decisions and ensuring compliance
(e.g., Hospital infection control policy)

Protocol:

Step-by-step plan for specific procedures, ensures consistency and safety
(e.g., Blood transfusion protocol in hospitals)

Procedure:

Task-level steps to standardise routine processes and reduce errors
(e.g., Patient handover procedure in wards)

Standard Operating Procedure (SOP):

Detailed instructions for recurring tasks, ensures uniformity and efficiency
(e.g., SOP for handling laboratory specimens)

Care Pathway (Clinical Pathway):

Multidisciplinary map of patient journey, optimises care and outcomes
(e.g., Stroke management clinical pathway)

Standard:

Measurable requirements to ensure quality, safety, and compliance
(e.g., Hand hygiene standards in hospitals)

In healthcare, a variety of decision-support documents are used to guide safe, consistent, and evidence-based clinical practice. Terms such as guideline, protocol, procedure, care pathway, and policy are sometimes used interchangeably, but each serves a distinct purpose. Clear understanding of these definitions is essential to ensure appropriate categorisation, development, review, and application of these documents in clinical settings. The Clinical Governance Support Unit (CGSU) can provide guidance on document classification and advise on the correct processes to follow.

The following definitions are drawn from reliable healthcare and academic sources to support best practice in clinical decision-making.

Clinical Guideline:

- Definition: Evidence-based recommendations developed through systematic review and expert consensus to support clinical decision-making
- Purpose: Improve consistency, quality, safety of care, and reduce variation in clinical practice
- Scope: Applicable across healthcare settings and conditions
- Level of Guidance: Moderate, provides recommendations rather than mandatory instructions
- Level of Detail: Moderate to high, may include algorithms, flowcharts, and evidence tables
- Application: Used by healthcare practitioners when diagnosing, treating, or managing specific patient conditions, also supports education and quality improvement
- Examples:
    - SIGN guidelines for managing asthma
    - NICE guidelines for managing diabetes

Policy:

- Definition: Overarching documents that establish rules, principles, standards, responsibilities, and guidelines governing an organisation's actions and decisions
- Purpose: Ensure consistency, compliance, and alignment with legal, strategic, and governance requirements
- Scope: Organisation-wide; may cover operational, clinical, or administrative areas
- Level of Guidance: Broad, sets direction rather than procedural steps
- Level of Detail: Low to moderate, focuses on principles, expectations, and responsibilities
- Application: Used by management and staff to guide actions, ensure compliance, and communicate organisational priorities
- Examples:
    - Hospital infection control policy
    - Privacy and data protection policy in a healthcare organisation

Protocol:

- Definition: Detailed plan describing the steps to be followed for a specific clinical scenario, treatment or task
- Purpose: Standardise clinical processes and ensure safety, reliability, and reproducibility
- Scope: Task-specific, focused on a particular procedure or clinical scenario
- Level of Guidance: High, provides prescriptive, step-by-step instructions
- Level of Detail: High, includes sequential actions, criteria, and decision points
- Application: Followed by clinicians during procedures, treatments, or trials to ensure standardised practice
- Examples:
    - Sepsis management protocol in an ICU
    - Blood transfusion protocol in hospitals

Procedure:

- <u>Definition:</u> A structured, step-by-step description of the actions required to perform a specific clinical or operational task
- <u>Purpose:</u> Ensure consistency, safety, quality, and standardisation in the performance of routine clinical or operational tasks
- <u>Scope:</u> Task-level, applied to routine or frequently performed activities
- <u>Level of Guidance:</u> High, provides clear, sequential actions and safety guidance
- <u>Level of Detail:</u> High, includes safety precautions, task sequences, and equipment guidance
- <u>Application:</u> Used by clinical or operational staff during routine tasks to maintain quality and safety
- <u>Examples:</u>
  - Sterilisation procedure for surgical instruments
  - Patient handover procedure in wards

Standard Operating Procedure (SOP):

- <u>Definition:</u> Detailed, written instruction describing how to perform a recurring task in a consistent and safe manner
- <u>Purpose:</u> Maintain quality, reduce variation, and ensure compliance with regulatory or organisational requirements
- <u>Scope:</u> Routine, high-risk, or regulated processes
- <u>Level of Guidance:</u> Very high, precise, and procedural
- <u>Level of Detail:</u> Very high, includes detailed instructions, parameters, safety checks, and troubleshooting steps
- <u>Application:</u> Used by staff during routine operations, training, or quality audits to ensure uniformity
- <u>Examples:</u>
  - SOP for administering intravenous medications
  - SOP for handling laboratory specimens

Care Pathway (Clinical Pathway):

- <u>Definition:</u> Multidisciplinary plan outlining the sequence of clinical interventions and responsibilities for patients with a specific condition or procedure
- <u>Purpose:</u> Coordinate care, reduce variation, and improve efficiency and outcomes across the patient journey
- <u>Scope:</u> Condition or procedure specific, spans the patient journey and involves multiple professional groups
- <u>Level of Guidance:</u> High, defines timelines, responsibilities, and expected outcomes
- <u>Level of Detail:</u> High, includes timelines, milestones, interventions, and decision points
- <u>Application:</u> Applied in routine, predictable clinical scenarios where multidisciplinary input is required
- <u>Examples:</u>
  - Hip replacement care pathway
  - Stroke management clinical pathway

Standard:

- <u>Definition:</u> Specifies requirements, measurable criteria, or benchmarks to ensure quality, safety, and performance
- <u>Purpose:</u> Support assurance, monitoring, and compliance with best practice
- <u>Scope:</u> Broad or specific, may apply to processes, systems, or outcomes
- <u>Level of Guidance:</u> High, sets clear, measurable criteria
- <u>Level of Detail:</u> Moderate to high, includes indicators and benchmarks for evaluation
- <u>Application:</u> Used for assessing compliance, accreditation, or operational consistency
- <u>Examples:</u>
  - Hand hygiene standards in hospitals
  - Standards for medical device sterilisation