

Clinical Product Resource Handoff Audit

Put the approved resource where the session starts.

Map product education materials used in a demonstration or training session. List the approved destination, intended audience, access needs, content owner, and last review date.

Choose one low-risk pilot

Start with public or otherwise approved, non-patient-specific material. Test the link, name who maintains the destination, and set a review date. Keep official labeling and controlled instructions in the organization's approved system.

SESSION RESOURCE	APPROVED DESTINATION	AUDIENCE / ACCESS	OWNER / REVIEW DATE
Product orientation			Owner: Date:
Demonstration guide			Owner: Date:
Education video			Owner: Date:
Training reference			Owner: Date:
Other approved resource			Owner: Date:

Before sharing

Use only the destination approved for this audience. Keep patient information, case details, credentials, complaint records, and confidential product data out of public tag destinations and this worksheet.

This worksheet helps a team map resource handoffs. It does not approve, secure, certify, or version materials and does not replace controlled documentation, access controls, or clinical judgment.