DUKE ANALYTICS

ASK · VERIFY · ACT · EN

ACT Action Brief

A practical worksheet to describe one real workflow before evaluating it with the DUKE Analytics team. Complete it with the account owner and the person responsible for the relevant data where their input is needed.

Worksheet for discussion. Completing it does not configure, approve or execute any action, and it does not establish that an integration is available for your setup.

01 Finding and proposed action

· What does the checked finding say, with its definition, source period and date?
· What uncertainty remains?
· What operational step is proposed, and what output is expected?

02 Approver and owner

· Who approves the scope?
· Who owns and carries out the action?
· Who handles exceptions?

03 Integration and permissions

· Which destination tool is intended?
· Is the integration supported for this setup? (to be confirmed in the evaluation)
· Which permissions and changes are allowed?

04 Evidence and scope

· Which records, accounts or items are in scope, and which are excluded?
· Which evidence must the approver see before accepting?
· How is eligibility rechecked before execution?

05 Confirmation and follow-up

· What execution evidence confirms the step happened in the destination tool?
· Which measure and observation period will be used to review the business effect?
· When is the review scheduled?

06 Correction and exceptions

· How can an incorrect action be amended or cancelled in the destination tool?
· Who may propose a correction, and who may perform it?
· What happens if the destination returns no clear result?