



Documenting workflows, or process mapping, is a great way to get a new team started on a process improvement project. Process mapping traces an object through a cycle from start to finish. The advantage of mapping a process as a group of inter-related steps is that you document the process from multiple perspectives. As you map the “current state”, be sure to map the actual process rather than what any one individual thinks the process should be. From this actual current state, you can:

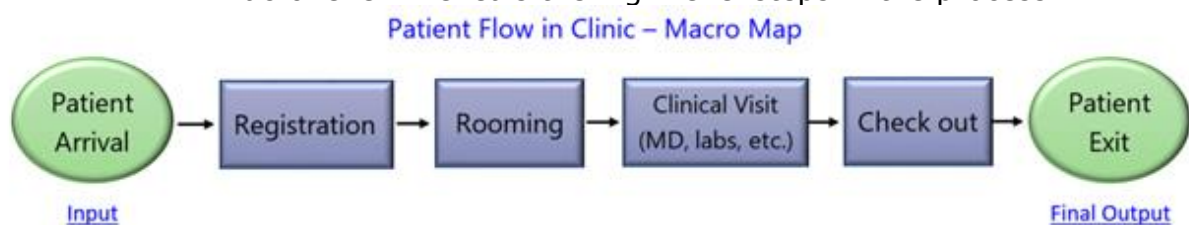
- Document the flow or sequence of events in a process
- Compare and contrast the actual versus the ideal flow of a process
- Detect unexpected complexity, problem areas, redundancies, unnecessary steps and opportunities for simplification
- Come to agreement on the process steps
- Use it as a training aid to understand the complete process

## Materials Needed

1. Sticky notes or index cards & tape
2. Markers – for writing on sticky notes or index cards
3. Large surface area (workspace, flip chart, white board, blank wall)
4. Team members from all areas of the organization involved in the process

## Mapping the Process – Current State

1. Select a process to map.
  - For our example, we will use the Patient Flow in Clinic.
2. Select a team to work on the process map
3. Clearly define where the process starts (input) and where it ends (final output)
4. Agree on the level of detail to be shown to clearly understand the process and identify problem areas.
  - It's sometimes easier to begin at the Macro level, and then add detail once the macro level is agreed upon.
  - Macro level – reveals the high-level steps in the process



- Detail level – reveals finite actions and decision points.
5. Add detail to each activity.
    - Brainstorm a list of major activities, inputs, outputs, and decisions from beginning to end. Use sticky notes or index cards to document each item.
    - Example:
      - What are the steps the patient goes through at Registration?
      - When Roomed?
      - What tasks are performed at each step?



# HealthTeamWorks® Process Mapping

- Who performs these tasks? Document the job role or title, not individual name.
6. Sequence the steps in the order they are carried out.
  7. Validate the accuracy of the flow chart. If you are unsure of the process, you may:
    - Interview people who execute the process
    - Shadow through a process with direct observation
  8. Draw the Process map using symbols.



<b>Beginning Point</b>	The first step of the process
<b>Process Step</b>	A step in the process
<b>Decision</b>	Use when there are several options available; add the Question in the center (e.g., Same-day appointment?) then add arrows to direct the work flow based on the answer. "Yes" arrow points right to continue, "No" arrow points down to end the process or begin next steps.
<b>Connector</b>	Use to connect one process to another process, or to another page if the process does not fit on one page. Start the continued process with this symbol OR use it to indicate where the process fits into the other processes.
<b>Terminal Point</b>	The last step of the process (e.g., Patient left office).
<b>Arrow</b>	Link the process symbols with arrows indicating the flow of the process.

9. Memorialize the Process Map by taking a picture and/or documenting it on the computer.
  - Name and date the Process
  - Add the names of all participating Team Members



## Improving the Process – Ideal State

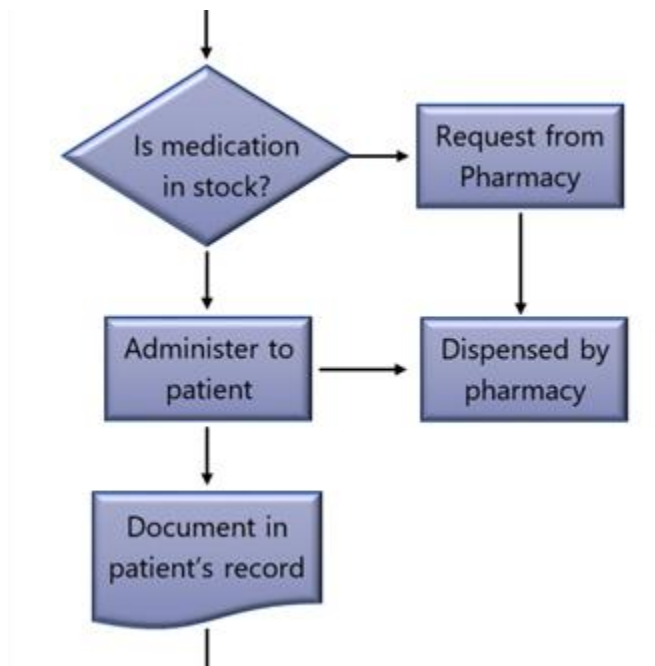
1. Evaluate the process map for improvement opportunities. Ask these questions:
  - How can we serve the patient/customer better?
  - What steps be eliminated?
  - What steps be combined with others?
  - Which steps be simplified?
  - Which rework loops be eliminated?
  - Can buildup of paperwork be minimized?
  - Which handoffs between people or departments be streamlined?
2. Create a second process map that illustrates the ideal process.
  - *What is the best way to proceed from start to finish?*
3. Determine actions necessary to move from the current state to the ideal state.
  - Permissions needed?
  - Resources needed?
  - Training needed?
4. Utilize a Process Improvement Methodology such as PDSA to make improvements.

## Types of Process Maps

Process Flow or Linear (How a process works)

**What:** a vertical (top to bottom) series of steps and decisions representing major steps in a process.

**Benefit:** maps a large process. Limits the amount of information to focus thinking. Organizes information to keep a team on track.



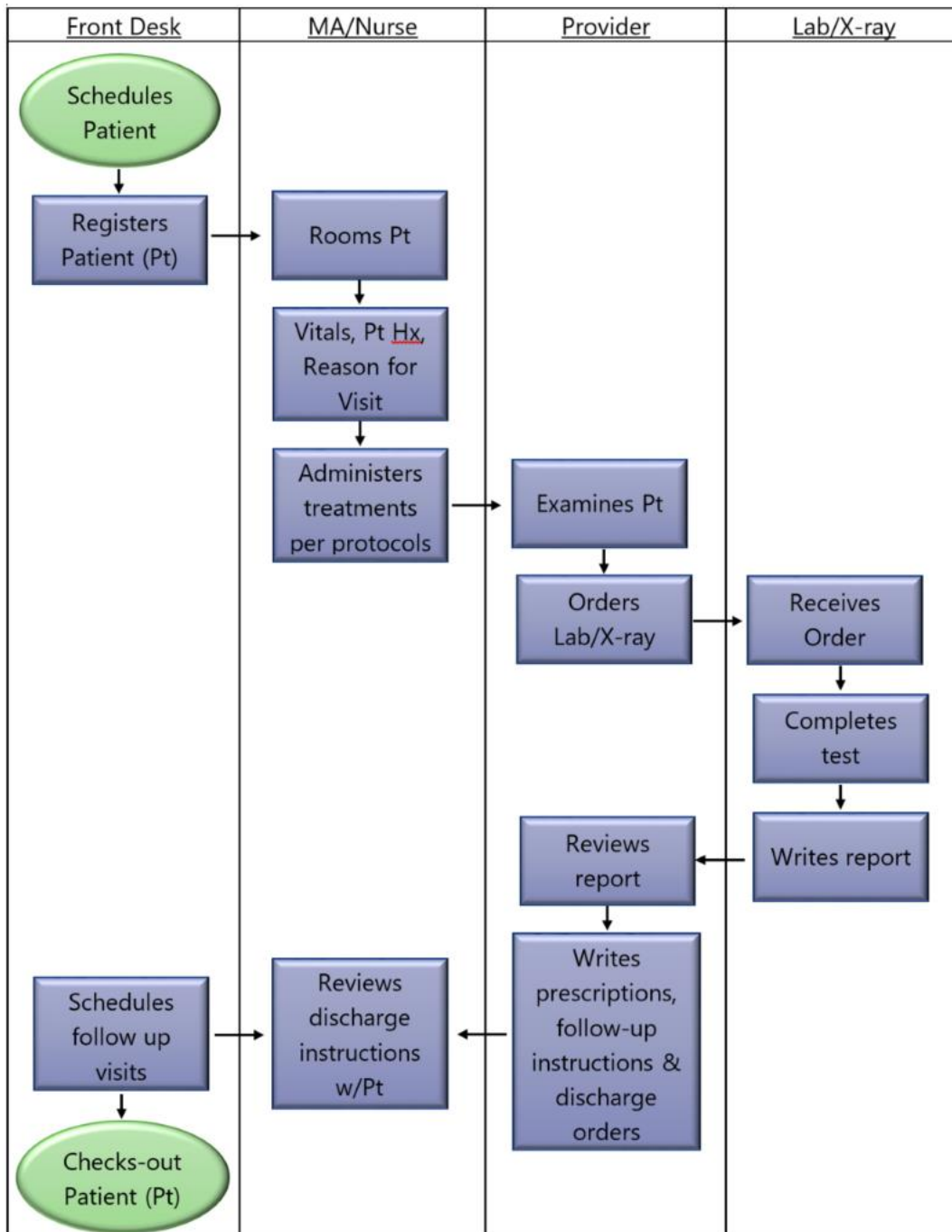


# HealthTeamWorks® Process Mapping

Swim Lane Map also: Responsibility, Relationship, or Deployment

**What:** lists (horizontally or vertically) the functions, departments or positions (not individual's names) mapping the tasks and decisions within each column or row for which each is responsible.

**Benefit:** makes clear both the tasks, responsibilities and decisions. To clarify roles and track accountability. To indicate dependencies in the sequence of events.

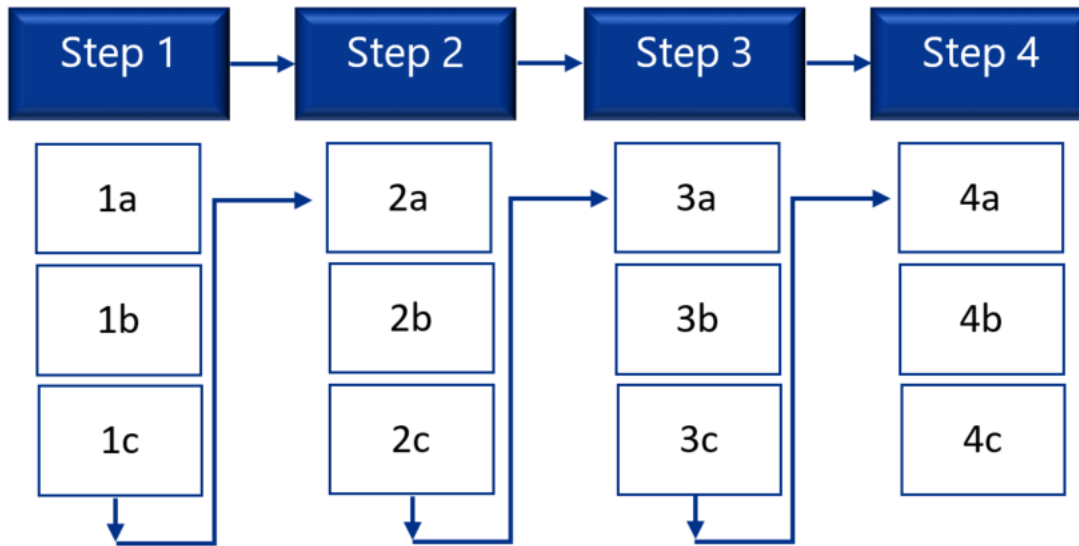




## Top-Down Chart

**What:** Picture of the major steps in the work process. Minimizes detail to focus only on the essential steps to the process.

**Benefit:** Allows teams to simplify or reduce the number of steps to make the process more efficient or effective.





## References

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