



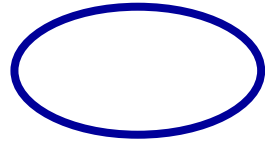
Process Mapping Overview and Instructions



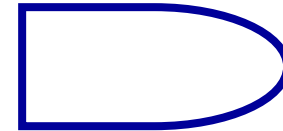
Flowcharts

- A flowchart is a **picture of the sequence of steps** in a process
- Different steps or actions are represented by boxes or other symbols
- These **step-by-step pictures** can be used to plan a project, describe a process, or to document a standard method for doing a job
- Flowcharts can **help team members understand** what is happening now in a process
- It is important to flowchart the CURRENT process, not the desired process

Symbol Key



Process beginning
or end



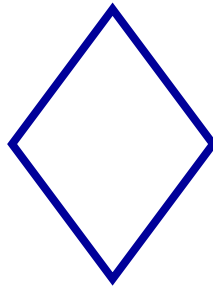
Waits and
Delays



Activity step



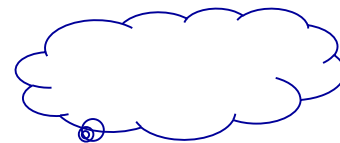
Process flow
direction



Decision Points



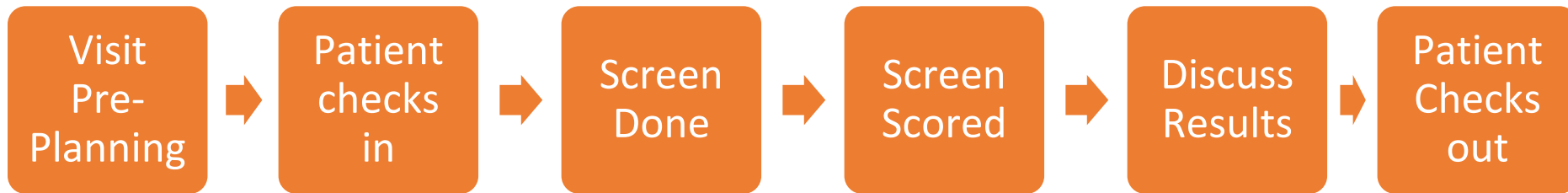
Connector
e.g. off page



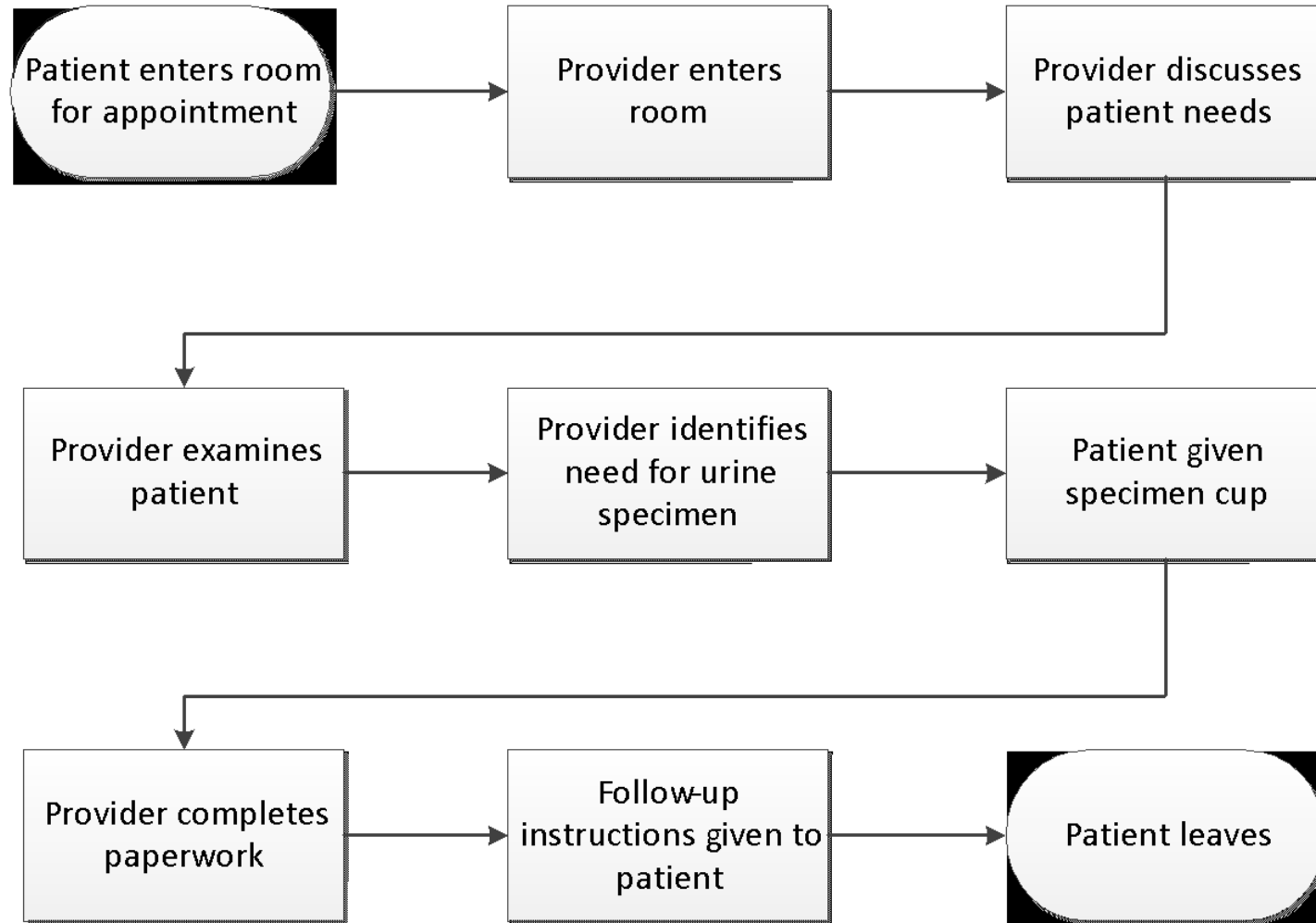
“Don’t Know”



Block Diagram

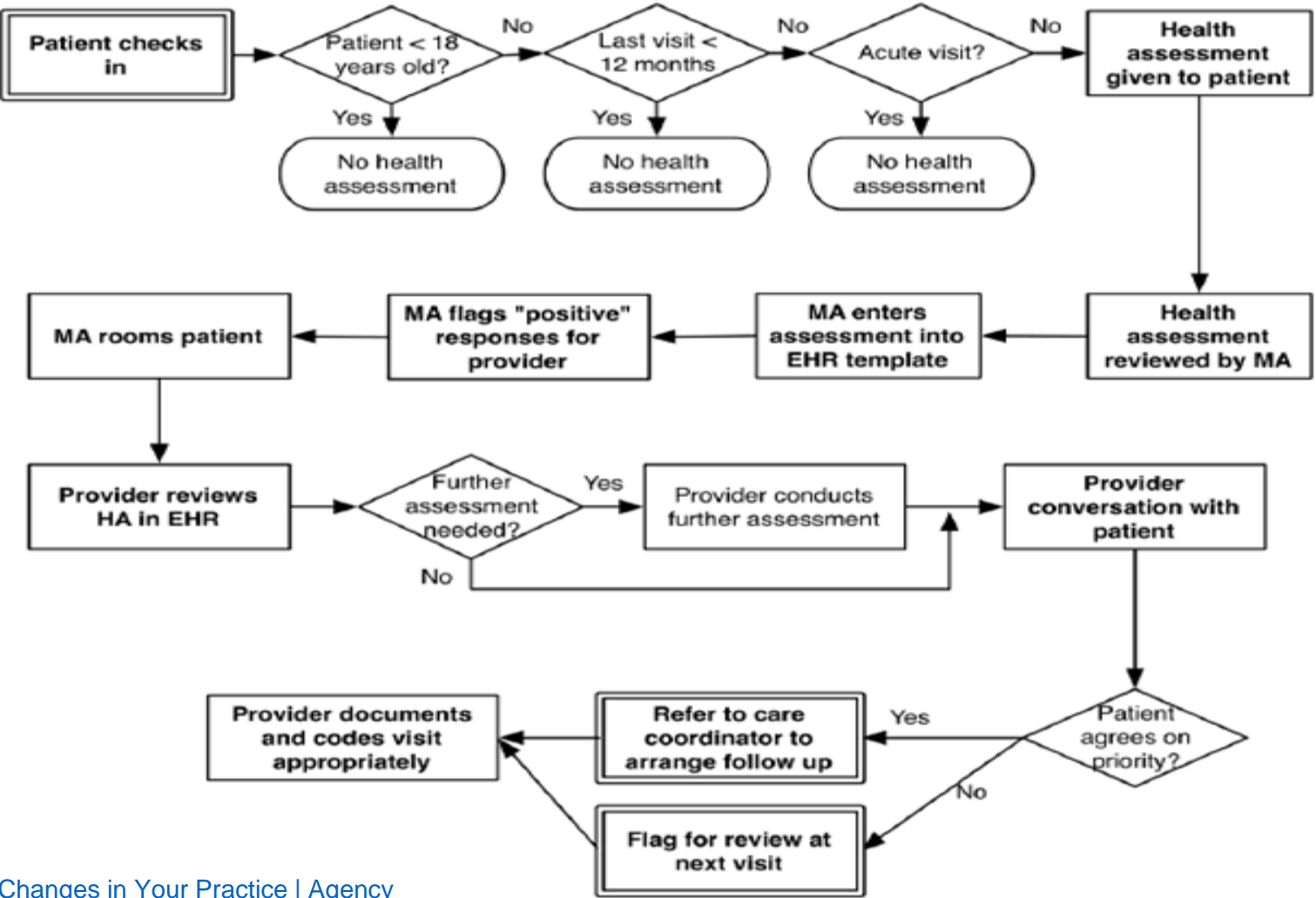


High Level Flowchart





Adult annual health assessment process for a paper questionnaire





Step-by-Step Instructions

1. Identify the process you intend to map, clearly specifying where the process begins and ends. To help with this, think about what trigger(s) that start the process and milestone(s) which indicate that the desired process outcome has been produced.
2. Identify the team members that “touch” or are “touched” by the process. It is important to have anyone who is involved in the process, including patients, provide input to the process map
3. Define each process step with an action word and indicate which team member is responsible for each action (e.g., “Medical Assistance screens for Social Determinants of Health”).



Step-by-Step Instructions

4. Use arrows to connect all process steps, decision points, and end points. It might be useful to use sticky notes so that steps can be re-ordered if necessary. You might consider use different colored sticky notes to represent the various roles in the process.
5. Identify decision points and define each decision point with a question (e.g., “Is the correct product available?”). Each decision point should have two arrows coming out, indicating a Yes or No response to the question. Ensure that there is a process step following both arrows.
6. Validate the process map with your team and other members of your clinic to ensure that it is the most accurate representation of the current process
7. Present final process map to the team and key stakeholders for review.



Flowchart Hints

- Use Post-It Notes
- Display your flowchart in your clinical area to invite engagement of other staff to contribute to the knowledge of the flowchart
- Focus on system or process, not on people
- Important reminders:
 - Drawings, markers, flipcharts are great
 - Not everyone has Visio...WORD, EXCEL good
 - Save “beauty” for later