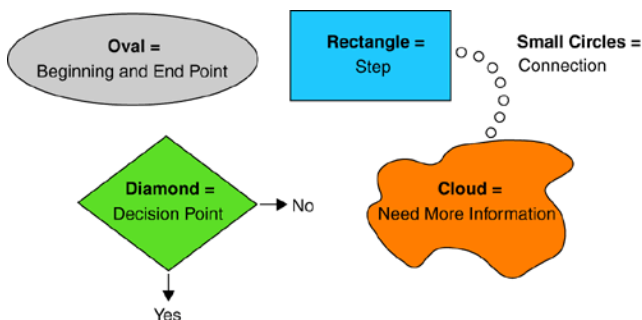


How To Map A Process / Construct a Flowchart

1. Get the right people in the room – those who know the process best.
2. Agree on the use of the map/chart & the level of detail required. **Starting with a simple high-level flowchart (5-20 steps) is recommended.**
3. Brainstorm the steps in the process.
4. Specify the beginning and the end with ovals. (Use standard symbols throughout.)
5. Use post-it notes to describe the rest of the major steps. Write one step per post-it, making it possible to move steps around as needed. It is often helpful to use "ing" words, e.g. "calling for advice", "initiating a project." Note that some steps are parallel (happen at the same time).
6. Describe the process as it really exists, not the ideal.
7. Once you have agreed on the steps and their order, identify which are decision points (diamonds) and which are not decision points (rectangles).
8. Connect steps with arrows as needed, if helpful.
9. At decision symbols, choose the most natural branch and continue to the end.
10. Use "clouds" or notes for unfamiliar steps and continue to the end.
11. When you reach the last step, go back to fill in the branches.
12. Assign action items to fill in unfamiliar steps and verify accuracy.
13. Ask one or two people to put together a clean copy to share with and discuss with the group.
14. Bring the larger group together again to recheck what you have come up with.
15. From the picture that emerges, identify frequent bottlenecks and similar opportunities for improvement.
16. At all stages of this activity, take the time to work through disagreements and conflicts. These are an important part of what you are trying to discover. They often reflect places where you need to either standardize, harmonize or redesign the process..



When to Map/Chart A Process: Let's say you decide to reduce patient wait times. The first thing you'll need and want to do is work with members of your care team to better understand why current wait times are long. You may already be measuring how long patients are waiting in the waiting room and in exam rooms before the first care provider speaks to them. But you may also want to have a better picture of what everyone on the care team is doing and how these pieces fit together. This would be a good time for a process map or flow chart.

Other Questions You Might Want To Ask: What are our desired outcomes for each step in this process and the overall process, and are they being achieved? Are we seeing any opportunities for changing who does what that would save time and/or prevent bottlenecks? Are we seeing places where mistakes are frequently made? Are we seeing areas where systematic procedures currently do not exist and need to be developed? Keeping in mind that every practice has a unique style or workflow, are we balancing the maintenance of the strengths of our unique style with being creative and innovative about the improvements we are considering? Finally, knowing we should only use elaborate processes such as this for things that are important enough to justify the effort, if we have begun to see eyes rolling, have we misjudged this aspect and do we need to rapidly introduce a simpler course of action?