Process Mapping

Process mapping is similar to flowcharting but with additional power. With process mapping an organization not only creates a map that shows you where you are, but also develops a “should” map that tells where you want to be. Together, these two process maps can lead healthcare organizations to major improvements in the quality of care that is provided in quality and revenue cycles.

Process mapping allows you to identify productivity opportunities, best practices, root causes of problems, create workflow consistency, and determine who owns an action item within the process and who is accountable for the process.

Steps to Develop a Process Map

1. Get the “right” people in the room—those who know the process best.

2. Agree on the use of the flowchart and the level of detail required.

3. Decide on the format of the flowchart—high-level or detailed. You may want to start with a fishbone diagram to get the details down and then apply them in order in a process map.

4. Define the first and last steps in the process (by observing, brainstorming, or consulting with the people responsible for each step). This could be done before the meeting to save time and direct energy to the actual process that you want to document.

5. Have a “Parking Lot” board to document important ideas and items that come up but do not fit in the present process.

6. Begin documenting the process steps in sequence. Note that some steps are parallel— that is, they happen at the same time. Describe the process as it really exists, not the ideal. Include what happens when there are problems in the process.

(Tip: Self-adhesive notes are a flexible way to document steps, using one note for each step. This allows you to easily change the order or add new steps.)

7. Use “clouds” or notes for unfamiliar steps and continue to the end.

8. When you reach the last step, go back to fill in the branches.

9. Read through the flowchart to check for accuracy and completeness.
10. Assign action items to fill in unfamiliar steps and verify accuracy. (e.g., what is the policy for patient identification?)

11. When the flowchart is complete and accurate, analyze it.

12. Based on the analysis identify opportunities for improvement and create a plan of action.

13. Update the flowchart as you implement your plan for improvement to document your progress and action.

What questions should you ask when analyzing the map?

- How many steps are there? (Remember that each of these steps has a reliability factor associated with it.)
- How many hand-offs are there? Are any of these hand-offs unnecessary?
- Could some tasks be carried out by one person instead of several people?
- Are the standards being met?
- Do our policies match our process?
- Are the processes the same during the week, evening, and weekend hours?
- Is there any duplication of work?
- Are there any bottlenecks?
- How much error correction/rework is being carried out?
  - How are errors documented?
  - Is the environment punitive?
- Are we doing the right things in the process?
- Are we doing things in the right order?
- Is the right/best person doing it?
- Which tasks help to achieve the purpose and which ones do not? Can those that do not add value to patients be removed?

Tips for Developing a Process Map

Using the right materials to physically produce the map makes the process go smoothly.

If you are developing a process map with several people use:
- Mapping paper (lining wall paper is cheap and effective:
- Marker pens
- Post-it notes
- Flip charts (to hold your idea and issue parks and display the ground rules)
- Tape
- Sheet with the symbols available (see diagram on page 3)
Process Map Symbol Diagram

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rectangle</td>
<td>A box or rectangle to show the tasks or activities of the process</td>
</tr>
<tr>
<td>Diamond</td>
<td>A diamond represents the stage in the process where a question is asked or a decision is required</td>
</tr>
<tr>
<td>Oval</td>
<td>An oval shows the start of the process and the inputs required and also show marks the end of the process with the results or outputs. The symbol is the same for the start and end of a process to emphasis interdependency</td>
</tr>
<tr>
<td>Arrow</td>
<td>Arrows show the direction or flow of the process</td>
</tr>
</tbody>
</table>

Helpful Hints

- Don’t map everything. Only map the process that you have chosen to improve.
- Let your process map cross functional boundaries. You want to see the whole, end-to-end process, not just the piece of the process inside your department. Improving one department or section does not always improve a service that flows through several departments. It is always much more important to manage the interactions between departments than it is to manage the actions inside each department.
- The **people who work in the process must** be involved in the mapping.
- Always map what actually happens in the current process rather than what you would like to be happening, or what should be happening according to the book.
- Remember process maps are to assist the team to examine the process or the system, it not intended to examine individuals.

Sources: