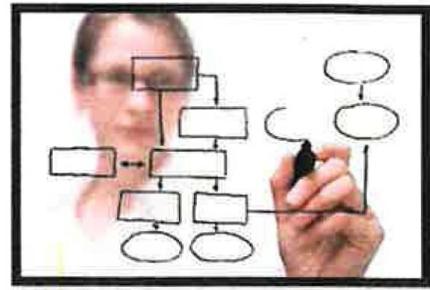


## Instructions for Process Mapping

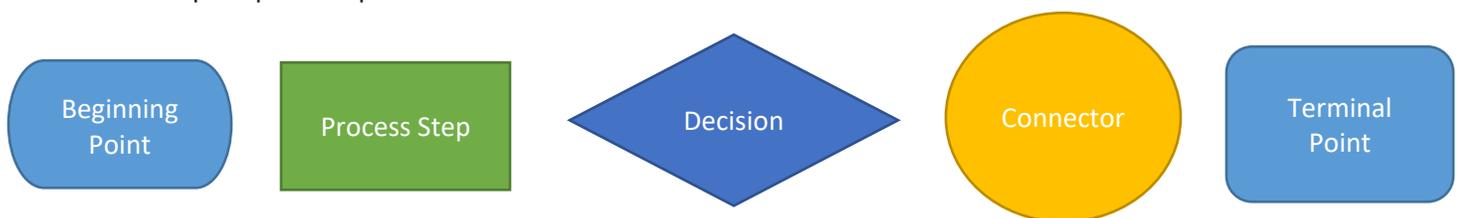
A process map provides a visual representation of how a particular process flows (such as rooming a patient), by distinguishing how work is *actually* done vs. how it *is supposed* to be done, and what functions the practice should perform to improve the flow. Using this QI tool, duplicate and missing tasks are identified. Typically depicted as a collage on a large sheet of paper, with different colored 'Post-it' notes or slips of paper. This graphic representation allows an observer to 'walk-through' the whole process and see it in its entirety.



- It can be used in problem identification and problem solving
- It provides an effective way to train new and existing employees It helps standardize the way tasks are completed
- It is used to identify and reduce waste and determine ways to improve process flow

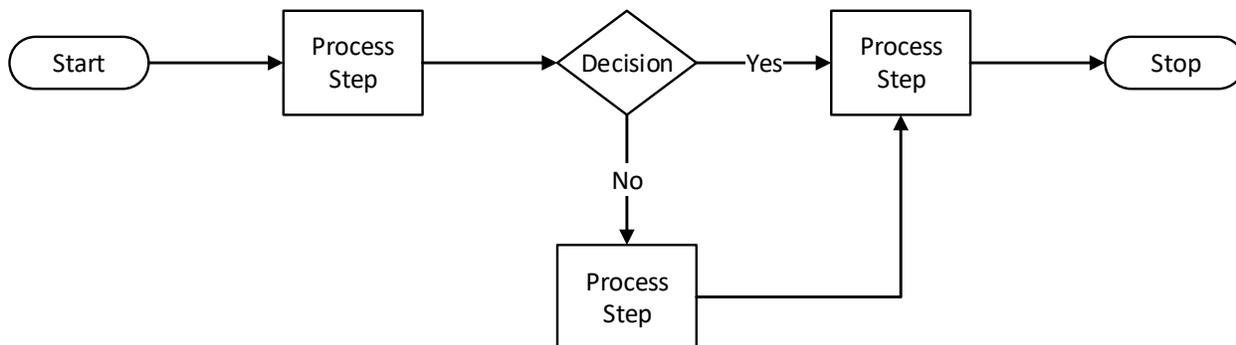
### How to Process Map

1. Select a process to map (with an eye towards making an improvement)
2. Define a team to work on the process map
3. Define and explain to the team how a process map works
4. Map it
  - Get a marker, different colored Post-it sticky notes, and a giant sheet of white paper (exam table paper or a white board/wall works well, just take a picture in case it gets erased)
  - Using Post-it notes will allow you to move around the steps in the process. Each role involved in the process should have uniquely colored post-it so you can see who owns which step in the process
  - Using the symbols (below), draw the process map
5. Map the primary process
6. Map alternative paths
7. Map inspection points



- **Beginning Point** = The first step of the process
- **Process Step** = A step in the process
- **Decision** = Use when there are several options available; add the Question in the center (e.g., Same-day patient?) and then put arrows with options (i.e., "Yes," "No")
- **Connector** = Use to connect process to another process or to another page, if 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
- **Terminal Point** = The last step of the process (i.e., Patient leaves office)
- **Arrows** = Link the process symbols with arrows indicating the flow of the process

### How to make a process map



### Swim Lane Map Variation

1. Each role or department associated with the process gets their own section on the diagram (see example below).
  - a. Draw horizontal lines to divide each section- or "swim lane"
2. Draw vertical lines to designate the process phases
3. Lay it out, as follows:
  - a. Starting from left to right, identify each step in the process. Write each down on a Post-it note and place the note under the appropriate role
4. Check and adjust as necessary
  - a. Review your process and adjust any post-it notes that are in the wrong place
5. After reviewing, ensure the whole group is in agreement
6. Once everyone agrees, type the process into a Word or Excel document, which will allow easy editing
7. Print out the diagram and distribute it to the QI team members

