

# Process Mapping Steps and Cheat Sheet

## ▶ STEP 1: Identify the Process

- Where are client outcomes less than desired or expected?
- Where are new or enhanced services to be integrated?
- Where and when have things gone wrong for clients or services?
- What do clients or staff complain about?
- What creates problems for staff?
- Where are resources not utilized effectively or wasted?
- Is there any duplication of work?
- Where does the process start and end?
- What are the main process steps?

## ▶ STEP 2: Identify the Process Mapping Team

- Multidisciplinary team (not too many staff)
- Have intimate knowledge of the process to be mapped (e.g., implementors, not just those in leadership who makes decisions about the process)
- Have authority to make change

## ▶ STEP 3: Prepare for Process Mapping Exercise

- Secure date, time (60-120minutes), location
- Newsprint, markers, tape, post-its

## ▶ STEP 4: Map the Process

- Review goal of exercise and describe what process is being mapped (start and end) and what outcome the process should produce
- Map the process in sequence:
  - Map BIG Steps in the process
  - List key activities/tasks staff complete for each BIG Step on post-it note next to each BIG Step
  - For each step, place the initial or staff type (e.g., nurse, clinician, clerk) who is responsible for completing the task
- **Tips:**
  - Don't map the "ideal workflow," do map the "real workflow"
  - Create a global map first – just the main steps – then fill in with detail as necessary
- Identify one team member to draw the map
- Start on a scrap sheet of paper
- Draw the map on newsprint using mapping symbols

### Conventional symbols that represent different activities:



#### Oval

the start and end of the process



#### Box

the BIG steps of the process



#### Diamond

a question that is asked; a decision is required



#### Arrow

the direction or flow of the process

## ▶ **STEP 5 : Analyze the Process and Identify Areas for Improvement**

- **Lens 1: Outcomes** - When are adolescent patient outcomes not as expected?
  - High STI/HIV rates
  - Low HPV vaccination rates
  - High pregnancy rates
- **Lens 2: Quality** - Extent to which implementing nationally recognized clinical recommendations
  - Same-day access to contraception
  - Time-alone with clinician
  - Screening for STIs using urine or vaginal swab specimen
- **Lens 3: Patient Experience** - Every process should deliver value to the client and be performed in a client-centered, culturally responsive manner
  - Teen-friendly environment
  - Teen-friendly interactions with staff
  - Cost not a barrier
  - What information is given to the client at each step and what information do they need?
  - Shared decision-making approach
  - Youth assets/strengths approach
- **Lens 4: Frustration** - Every process should be efficient, easy to understand and implement
  - Where is there duplication of work?
  - Where is the process not clear?
  - Where are staff roles and responsibilities unclear?
  - Where are bottlenecks or delays experienced?
  - Where do clients/staff complain?
  - Where are there problems for staff?
  - Are these the best steps for the process?
  - Is this the best order for the process?
  - Is the right person doing each step?
- **Lens 5: Time** – Often the goal of a process improvement initiative is to shrink time
  - Too many steps in the process
  - Too much waiting
  - Which steps/tasks add value? Which don't?
- **Common Problems:**
  - Waiting delays
  - Rework
  - Excessive handoffs
  - Interruptions
  - Many requirements for decision and approval
  - Poorly defined requirements

▶ **STEP 6: Redesign the Process**

- Review process map and identify services/tasks provided at each step and forms used:
  - Target and eliminate/streamline redundant or unnecessary paperwork or tasks
  - Combine steps
- Define which activities or tasks can only be accomplished by a specific category of worker:
  - Assess if staff activities are maximizing staff expertise
  - Determine what tasks can be shifted from one staff member to the next – task shifting
  - Consider implementing or enhancing team-based models of care
- Re-bundle activities to balance workload, minimize inefficiencies and enhance quality
- Ensure necessary materials and supplies are easily accessible
  - Create a LARC Kit/Cart that includes all materials necessary to insert/remove LARC devices are available in exam room
  - Ensure necessary education materials or patient consents are available in exam/client counseling rooms
- Identify where quality checks can be built-in
  - Convene staff huddles or conduct pre-visit planning
  - Build in alerts in EHR

▶ **STEP 7: Finalize the Process Map**

- Integrate process re-design ideas
- Create visual picture of process map
- Share more broadly with staff to gather feedback and make final revisions

▶ **STEP 8: Implement New Process and Improve**

- Train staff on the process
- Implement new process
- Monitor and improve