Quality Improvement: Process Mapping

Topics

- Learn what process mapping is
- How process maps supports quality improvement (QI)
- The basics to create a process map
- Review a sample process map
What Is Process Mapping?

Key Concepts and Definitions

- **Process**: A complete set of activities or steps designed to produce a result that helps to accomplish a particular organizational goal.
- **Workflow**: Study of “Who/Does/What/When?” a combination of steps, tasks, or events and/or decision points that support the process which results in the process outcome.
What is Process Mapping?

- Creating a visual diagram of the steps involved in your work
- End-to-end mapping of a process
- Determining what the scope of the process is (beginning and end)
- Process mapping is part of understanding your “system”

Process Mapping Supports the Model for Improvement

- Process Mapping is a tool that supports the Model for Improvement
- Helps answer the final of the Model for Improvement 3 key questions:
  1. What are we trying to accomplish?
  2. How will we know the change is an improvement?
  3. What change can we make that will result in improvement?
- Mapping precedes using the PDSA tool
5 Steps of Process Mapping
1. Current state – document and review existing process
2. Determine changes needed
3. Future state – map out desired process
4. Test future state process
5. Decide and act on results of process modifications

Why Do Process Mapping?
• The power of visual representation
• There are always “Ah-ha!” moments
• Identifies and documents how work is done
• Helps demonstrate how people, processes, and technology are integrated
• Opportunity to correct broken processes and analyze how we do our work
Process Mapping is a Team Activity

- Engage stakeholders and create buy-in
- Prepares us for change
- Process “owners” know what changes may work best
- Helps contrast:
  - Perceived process
  - Actual process
  - Ideal or “future-state” process

Mapping Out Your Process

- Framing the process: what is “in” and what is “out” of scope?
- Identify process input/trigger and outputs (start and end of the process)
- Document major steps in the process, from trigger event to the end result
- Who are the stakeholders and customers?
- What are the process inputs (reports, data, equipment, etc.)?
- Keep thinking “Who / Does / What / When?” as you visually build your process
- Consider interdepartmental handoffs
Identify Opportunities to Improve the Process

- Bottlenecks
- Rework due to errors
- Role ambiguity
- Unnecessary duplications
- Long cycle time

- Lack of adherence to standards
- Lack of information
- Lack of quality controls
Mapping the Current State Process

- Map the current process using progressive levels of detail until the process is understood
- Use the 80/20 rule when diagraming and documenting your process (you can spend 80% of your time documenting only 20% of the process - try to do it the other way around!)
- Capture low hanging fruit and “ah-ha!” moments

Process Shapes

- Generally run top to bottom, left to right
- Each step needs to say clearly:
  - Who - Subject
  - Does - Verb
  - What – Object
- Decision diamonds represent key choices or decisions.
  - Label the process path
  - Yes or No (most frequently)
**Process Map Example**

An oval shows the input to start the process or the output at the end of the process.

A box or rectangle shows a task or activity being performed.

A diamond shows a yes/no question or a decision.

The shape used to represent a document or report.

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**Example: Medication Refill Current State**

Refill request received by the...

Provider documents prescription in the chart.

Chart is returned to MA by...

MA contacts patient and receives reason for denial.

Source: HealthInsight, Workflow Demystified; 9SOW-UT-2010-00-112
Example: Medication Refill
Future State

- Assemble your team
- Use sticky notes and bold pens
- Start by documenting beginning and end of the process
Process Mapping (cont.)

- Turn sticky notes sideways for decision diamonds
- Don’t start drawing lines to connect steps yet!

Process Mapping (cont.)

- Add steps as you identify them
Process Mapping (cont.)

- Move notes around as needed
- Continue to review
- Look harder, ask “Why do we do that” and “Do we all agree this is the right way?”
Process Mapping (cont.)

When steps are complete:
• Review for accuracy and detail
• What jumps out at you?
• Reorder and modify as needed

CAUTION:
Photos or paper don’t lend themselves to updates
Electronic Process Map

Process Mapping Considerations

- What event triggers or starts the process?
- What information needs to be delivered to the next step? Or what decision needs to be made?
- What is a process step (task) for this process?
- What is a work instruction?
Process Mapping
Example: Clinic Hypertension Process

Swim Lane Process Maps
Process Mapping Summary

• The power of process mapping lies in the visual representation of the process
• Process mapping is a vital step in understanding how your organization really carries out its work
• Process mapping is as a catalyst for QI team discussions
• Engaging people who do the work is essential to success
• Understanding and communicating “Who/Does/What/When?” is key!

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This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) as part of an award totaling $625,000 with 0% financed with non-governmental sources. The contents are those of the author(s) and do not necessarily represent the official view of, nor an endorsement, by HRSA, HHS or the U.S. Government. (December/2018)