



Process Mapping: A How-to Primer

It's easier to integrate patient self-management support (PSMS) into your workflow if the project team first creates a process map of the current workflow for an office visit. To create a process map of the office visit as currently delivered:

1. Identify those who touch the process: patient, lab, physician, receptionist, etc.
2. Identify the starting and ending points for an office visit (e.g., from the time the patient calls for an appointment to the time the appointment ends).
3. Post the steps in the process over time (from left to right). Put a circle or oval around the starting and ending points. If there is a decision point or "fork" where more than one outcome is possible, draw a diamond around it. (For example, put a diamond around a lab results step, since the next steps taken will be different depending on whether the test result is normal or abnormal.) Draw squares or rectangles around all the other steps.

See the Attachment for a sample process map of an office visit.

After the project team has mapped the current process, discuss options for incorporating PSMS into the office visit. Select the best option for your practice, and then modify the process map to show the revised process with PSMS.

Document your decisions and the revised process.

ADDITIONAL RESOURCES ON PROCESS MAPPING

- Dewey D, Baker P. Physician office quality improvement: how to map your office process: an MPRO self-instructional module. www.providersedge.com/ehdocs/ehr_presentations/Physician_Office_Quality_Improvement-How_to_Map_Your_Office_Process.pdf. Accessed October 30, 2012.
- Endsley S, Magill MK, Fodfrey MM. Creating a lean practice. 2006;13(4)34-38. *Fam Pract Manag*. www.aafp.org/fpm/2006/0400/p34.html. Accessed October 30, 2012.
- Workflow redesign templates. The National Learning Consortium. www.healthit.gov/node/291. Accessed October 30, 2012.



ATTACHMENT | Sample Process Map of an Office Visit

