

# Creating a Process Work Flow



# Process Work Flow

- A **workflow** consists of a **sequence** of connected steps diagramed/flowcharted to explain the movement of materials, information, or people through a process that has clearly defined start and stop points.



# Purpose of Work Flow Analysis

- Promotes cross-discipline understanding of each step & the measures being used to collect data.
- Connects multiple dimensions –billing, data collection and reporting, clinical services, practice management, etc.
- Promotes understanding of each team member's role(s)--What do you do? Why and how do you do it?



# Steps to Conducting a Workflow

**Step 1:** Decide what process to examine. It's best to choose a very specific process (e.g., New pt. walk in intakes versus intakes)

**Step 2:** Gather the team members involved in the process (including clinical, admin., finance, & MIS/IT staff).

**Step 3:** Create a preliminary flowchart by walking through each step in the process. Define for each step what data is collected, the form(s) completed, how long it takes, & how the step is billed/paid for.



# Steps to Conducting a Workflow

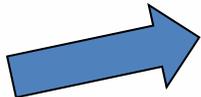
**Step 4:** If the process is complex determine who you need to observe & interview.

**Step 5:** Conduct the observations & interviews.

**Step 6:** Evaluate which steps in the process need to change & develop Plan-Do-Check/Study-Act Cycles to monitor effectiveness.

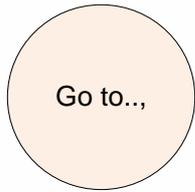


# The Process Work Flow Map



- A rounded rectangle is used at the beginning of a process, with the word “start” inside and at the end of a process with word “end” inside. It is not used for any other reason.
- Arrows represent direction and sequence between process steps.
- Put a **single** step inside of a rectangle. You should not put more than one step in a rectangle.

# The Process Work Flow Map



- Use a circle to indicate that you need to “go to” another process or page to where it continues someplace else.
- Use a diamond for all decision points or questions. Place the question or decision inside of the diamond.



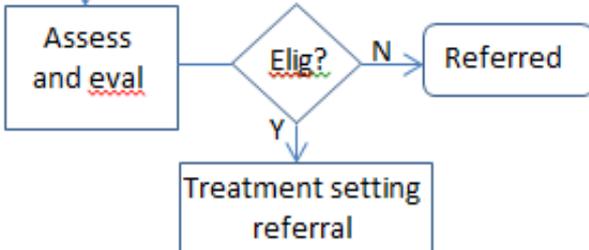
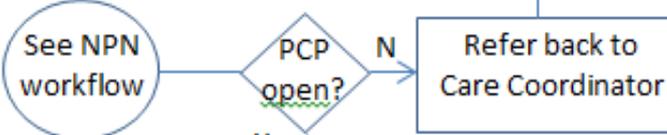
- From the diamond, you can branch in multiple ways, depending on the nature of the decision or question.

# Remember!

- Have a parking lot list for items that come up that need to be followed up on later (e.g., “that form we use in this step is awful we need to rewrite it...”).
- See the “sample business process work flow” that accompanied this power point presentation.
- Most importantly have fun and ask questions.
- The next slide shows an example of a work flow.



**Process: New patient, Central Intake, Screening and Referral to PBHCI for Eligibility Assessment, sees Primary Care Provider**

ROLE	ACTIVITY
New Patient	
Intake Director	
Intake Counselor	
Primary Clinical Counselor	
Care Coordinator	
Nurse Practitioner	
Primary Care Provider	