The 10 Building Blocks of Primary Care
Overview of Workflow Mapping

Background and Description

Workflow maps are a visual representation of the actions, decisions, or tasks performed to achieve a certain result. Workflow maps give practices an easy and quick way to visualize common processes from beginning to end. The required steps can be mapped to create a standard workflow or to find and remove wasted effort. This overview defines workflow mapping and describes five things to keep in mind when creating a workflow map. It details the basic symbols of workflow mapping and simple steps for creating a workflow map.

Instructions

Read this overview of workflow mapping and try it out on a workflow in your clinic. Use the basic symbols and follow the 6 simple steps for creating a workflow map. Once the map is created, ask the group if there are ways that the workflow can be simplified and improved.

UCSF Center for Excellence in Primary Care

The Center for Excellence in Primary Care (CEPC) identifies, develops, tests, and disseminates promising innovations in primary care to improve the patient experience, enhance population health and health equity, reduce the cost of care, and restore joy and satisfaction in the practice of primary care.

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Overview of workflow mapping

What is workflow mapping?

Workflow maps are a visual representation of the actions, steps, or tasks performed to achieve a certain result. Registering patients for appointments, rooming patients, refilling medications and answering telephones are all processes that happen in a practice on a daily basis, and the required steps can be mapped to create a standard workflow or to find and remove wasted effort.

Workflow maps give practices an easy and quick way to visualize the entire process from beginning to end, with all the steps that occur in between. They let you graphically see how work is currently done in your practice.

Workflow maps also show who performs each part of the process. This is very important because this allows everyone to understand what other people are doing and how each person coordinates with one another. Often people are not aware of what their colleagues in the practice actually do. Since some processes involve several people from multiple disciplines to complete the activity, a multidisciplinary team is needed to discuss the workflow map to ensure that the details of the process are accurately captured.

Five things to keep in mind when workflow mapping:

1) Maintain an open and constructive environment.

2) Focus on the system or process, not the people.

3) Before mentioning a variation of the process, think about whether this event was a one-time occurrence or a habit.

4) Map out the process you currently have (not the one you wish you had) so your team can pinpoint flaws in the process and improve them.

5) Workflow mapping is a tool for continuous improvement.

Basic symbols for Workflow mapping

(rounded rectangle)	**START/END:** Indicates the start and end points of a process
(rectangle)	**OPERATION:** A specific task or activity that is performed
(diamond)	**DECISION POINT:** A point in the process where a yes/no question or a decision is required before moving on to the next step
(arrow)	**DIRECTION:** Arrows connect steps in the process and direct flow of information
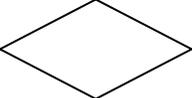
Simple steps for creating the initial workflow map (the AS IS workflow)

Step 1. Pick a process to map, pick which type of workflow to use (high-level or detailed), pick a lead person

Step 2. Determine the beginning and end points in the process

Step 3. Identify each step in the process

Step 4. Put the steps in order (on paper, with stickies, or on computer -- word, powerpoint, Vizio)

Step 5. Review and edit first draft

Step 6. Review flowchart with the team for input and to ensure the flowchart is accurate