



WORKSHEET 3 | How to Create a Process Map

Process maps will make you gain an organizational focus on work processes at your agency.

1. Why Process Mapping

Developing a process map will allow your site to visualize the SBIRT implementation process. Process maps can be used to describe new and/or existing processes and can help you identify bottlenecks and errors. A completed process map organizes your patient flows, SBIRT strategies and decision rules into a plan from which you can work out the details of what each screen, brief intervention, or referral to treatment will look like. A process map will allow you to identify key problems/bottlenecks within your system and determine where to test ideas to optimize impact (→ PDSAs, see **Worksheets 5a-c**).

Specifically, a process map should address and answer the following questions:

- What's the name of process?
- Where does the process begin, and where does it stop?
- Who does what?
- What does the process include/not include?

EXERCISE: Develop a process map of the steps that a typical client follows from initial contact (phone, walk-in, or referral) to a screening session (for an example, see **Figure 1**).



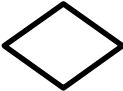



2. Process Mapping in 5 Easy Steps

- **Step 1:** Needed resources?
 - ✓ *A roll of brown paper/flipchart*
 - ✓ *One extra sheet of paper*
 - ✓ *Markers*
- **Step 2:** Before getting started, the Change Team should...
 - ✓ *Define the objectives*
 - ✓ *Identify additional staff members who can provide input on the process map.*
- **Step 3:** Draw process map, using symbols below (see **Table 2**)
 - ✓ *Define the process name, beginning, and end*
 - ✓ *Identify decision points*
 - ✓ *Identify bottlenecks*



- **Step 4:** On a separate sheet of paper, list any data collection forms that are used
 - ✓ Identify where along the process map the forms are used
 - ✓ Record what is done with the data collection forms
- **Step 5:** Gather suggestions for process improvements
 - ✓ Review suggested changes
 - ✓ Evaluate ideas
 - ✓ Discuss next steps: Test most promising ideas using PDSAs (→ Worksheets 5a-c)

Table 2 | Process Mapping Symbols

 process step	 data symbol
 decision point (needs 2 lines leaving it)	 terminator
 document symbol	 connector

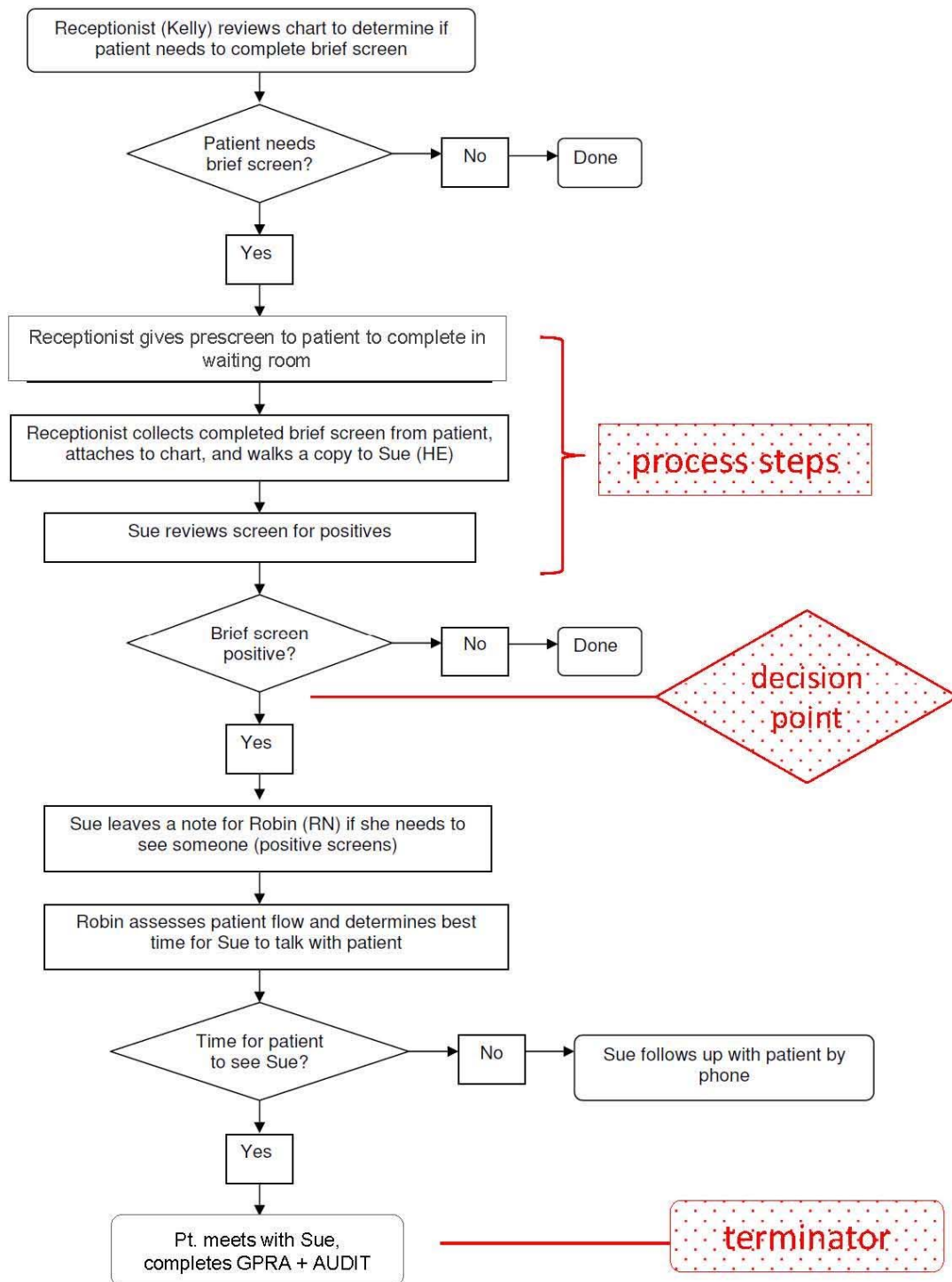


Figure 1 | Example of an SBIRT process map: From patient admission to screening.