OHIO ACADEMY OF FAMILY PHYSICIANS

Our Team's Process Map & Goal

EasyPI: Obesity

Process Mapping

Use this form to fill in your process map.

GOAL STATEMENT

Setting goals is a fundamental component to long-term success. Goals help you focus and allocate your time and resources efficiently, and they can keep you and your team motivated to reach a positive outcome.

Goals should include the population, the intervention, and the outcome you want to achieve.

Example: Our practice will empower patients with obesity to work toward healthy weight by using motivational interviewing and involving the entire team to make exercise and diet recommendations.

____

____

____

____

Workflow & Process Mapping

Process mapping allows a practice to involve the entire practice team or representatives from each clinical and non-clinical job role in determining how work is currently done and creates a visual map of the steps your practice currently uses for a specific patient care or administrative task. Before making changes in a practice, it is important to understand your starting point and available resources.

Benefits of Process Mapping

- Allows everyone to visualize and appreciate what role/contribution they and their colleagues play in the care of patients.
- Gives an overview of the current processes that allows the team to plan for change.
- Identifies unintended variations in care, inefficient procedures, and opportunities to involve other team members in care.
- Improves communication between team members, gives team members increased ownership in patient care, creates a low-risk opportunity for staff members to suggest ways to improve patient care, and can increase employee job satisfaction.

Supplies Required

- A large empty space with a whiteboard, large paper, or tabletop easel and pad
- Two sticky note pads in contrasting colors

Who to Involve

- Representatives in each role (both clinical and non-clinical)
- Of those participating, appoint someone to serve as a moderator to help guide the conversation and someone to take notes to capture all ideas, even outside of what goes on the process mapping document
- Ensure that all team members have the opportunity to share (make sure that physicians wait to share until all other team members have spoken)

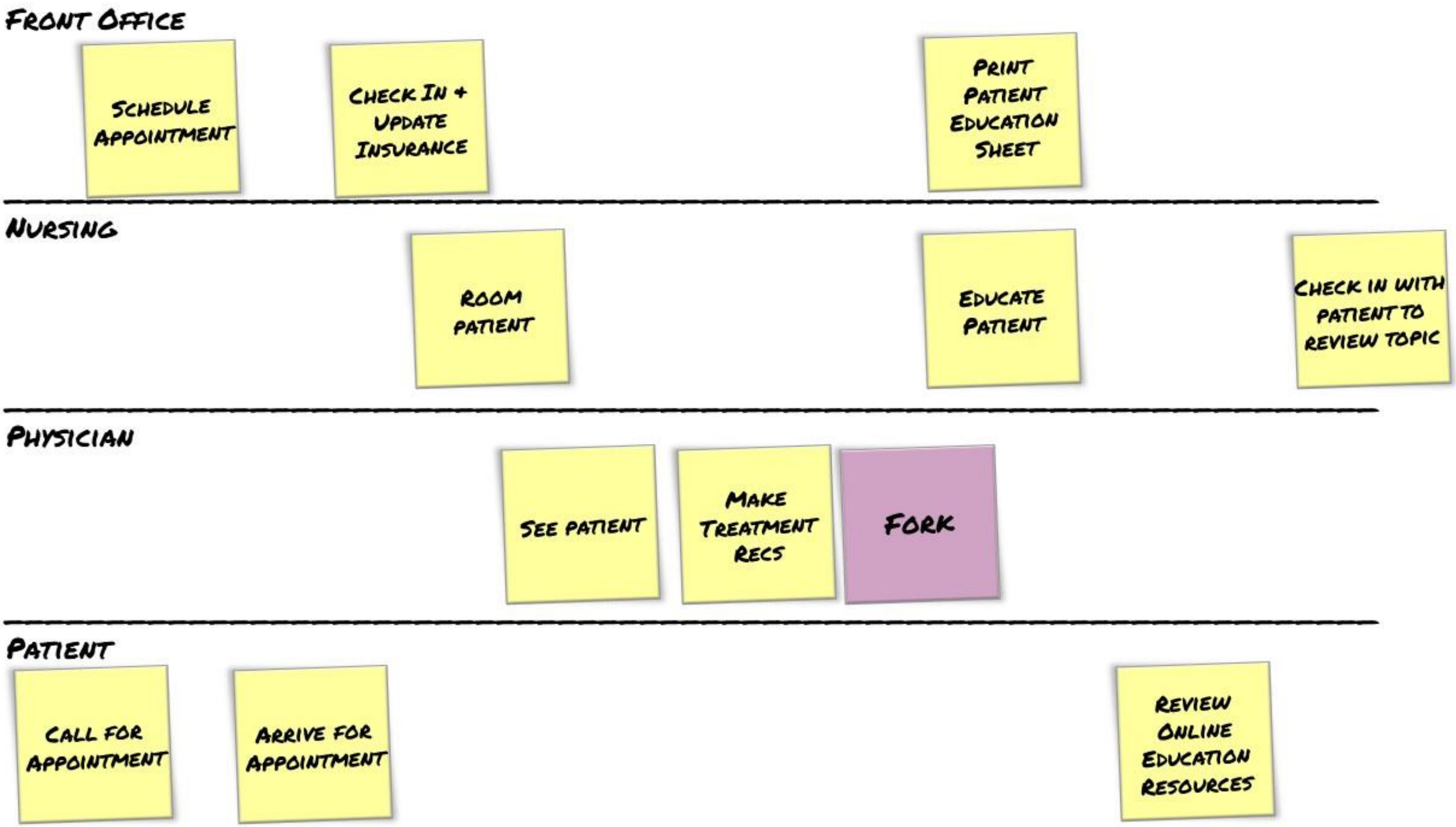
Creating a Process Map

1. Identify everyone who is involved in the process you are mapping.
   Might include patient, family members, physician, nurses, front office staff, specialists, and outside organizations
2. As a group, identify the starting and end points of that process.
   Example: From the time the patient calls for an appointment to the time the appointments ends
3. Next, draw lanes and label for each member of the care team.
4. Place the sticky notes in the appropriate lane according to current office process.
5. If in your process you encounter a fork or scenario where two or more outcomes drive future action steps, take a sticky note of contrasting color and write "FORK" on it, then place it on the map in appropriate sequence of steps identified.
   Example: The staff member doing patient education depends on who is available and the topic of education, this action signifies a "FORK" and therefore changes course for the following steps in the process.
6. As a group, take time to review your process map. Use the **Process Map Questions** to guide your discussion.
7. Use your phone or a camera to record your process for future reference.
8. Use your process map as you plan for change/performance improvement in your practice.
9. While discussing these processes, other ideas may pop up. It may be helpful for the note taker to establish a "parking lot" where ideas can sit that may not necessarily find a home in the current workflow but come up in conversation. The team can decide to address these items at a later date.

For more information on Workflow Mapping, the OAFP has a video at https://youtu.be/_GkVS9d1vK8 that explains the process.

Sample Process Map

Patient Education



Process Map Questions

When you have completed your process map, you can use these questions with your team to reflect on your current process, then prepare for and plan change. Move the post-it notes to enhance your workflow and create a new strategy for optimal care delivery.

Evaluating Your Current Process

Is this the most efficient process for the task at hand?

Could members of the care team, not previously identified, be better utilized in this process?

Is the right information available at the right time?

Can your workflow be standardized or simplified?

Could other offices processes follow suit to ensure simplified office systems that maximize the team?

Effects on Health Equity

Are there subpopulations within your practice where this system might not work well?

Are your interventions culturally appropriate for all of your patients?

What processes reach outside the practice?

What partnerships with community resources can improve care?

Consider Population Health

What processes are already in place that reach outside our clinic walls? Can we leverage those relationships for an even greater impact?

What other organizations in our community can we reach out to?

How can we connect patients to the resources they need?

Creating a Performance Improvement Plan

Is there space to improve the care provided for this condition?

What are good evidence-based measures that can be used to measure progress? Can the data for this measure be easily obtained? Is it possible to create a dashboard in the electronic health record to track this data in real time?

How can you engage patients in this project?

Are there ways to use other team members to reduce the workload for physicians?

Can you apply things you have learn from previous performance improvement projects to this project?

Can this project support pay for performance or other practice priorities? Can this project be used to get credit for board certification, continuing education, licensure, or other requirements?