Workflow & Process Mapping Exercise
Eliminating unnecessary or wasteful steps in a process makes work run more smoothly and is more satisfying for staff. A workflow & process mapping exercise creates a visual map of the steps that the entire practice team (including the patient) takes to conduct a routine visit where colorectal cancer (CRC) screening discussions are appropriate.

Benefits of Process Mapping
There are a number of benefits to mapping out and recording your process. Listed below are just a few:
1. The visual display allows everyone to see what role/contribution their colleagues make to the overall goal and creates appreciation for what other members of the care team do.
2. A process map allows everyone to see their work in the context of the overall process, which increases staff satisfaction.
3. This exercise allows the care team to see where work backs up, where work can be standardized to improve patient flow/work flow and to identify problem areas that can be tweaked for maximum efficiency.

Supplies Required
- One flipchart with adhesive backing
- Two sticky note pads in contrasting colors
- Wall space to display the process map

Steps to Create a Process Map
1. Identify everyone who is involved in the process of discussing colorectal cancer screening (patient, physician, nurses, front office staff, medical assistants, etc.)
2. As a group, identify the starting and end points of the process you are mapping (example: from the time the patient calls for an appointment to the time the appointments ends or after a recommendation/appointment is set for CRC screening to when results are received, process and reported to the patient.)
3. Next, draw “swim lanes” and label with the names of each member of the care team.
4. Post 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. For example, if the results of the colonoscopy are normal, abnormal or inconclusive, this action signifies a “FORK” and therefore changes course for the following steps in the process.
6. As a group, take time to reflect and ask the following questions:
   - 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 simplified?
- Could other offices processes follow suit to ensure simplified office systems that maximize the team?

7. Record your process to use for future reference.

### Example Process Map

<table>
<thead>
<tr>
<th>Patient</th>
<th>Appointment made and arrive on time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physician</td>
<td>Recommendation made for colonoscopy or FOBT</td>
</tr>
<tr>
<td>Nurse</td>
<td>Vitals taken, Discuss CRC screening,</td>
</tr>
<tr>
<td>MA</td>
<td></td>
</tr>
<tr>
<td>Front Office Staff</td>
<td>Patient appointment made</td>
</tr>
<tr>
<td>Gastroenterologist</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>

Notes: