

Flowchart

Flowcharts allow you to draw a picture of the way a process actually works so that you can understand the existing process and develop ideas about how to improve it. A **high-level flowchart**, showing six to 12 steps, gives a panoramic view of a process. These flowcharts show clearly the major blocks of activity, or the major system components, in a process. High-level flowcharts are especially useful in the early phases of a project. A **detailed flowchart** is a close-up view of the process, typically showing dozens of steps. These flowcharts make it easy to identify rework loops and complexity in a process. Detailed flowcharts are useful after teams have pinpointed issues or when they are making changes in the process.

Using a flowchart has a variety of benefits:

- It helps to clarify complex processes.
- It identifies steps that do not add value to the internal or external customer, including: delays; needless storage and transportation; unnecessary work, duplication, and added expense; breakdowns in communication.
- It helps team members gain a shared understanding of the process and use this knowledge to collect data, identify problems, focus discussions, and identify resources.
- It serves as a basis for designing new processes.


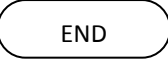
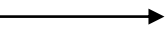
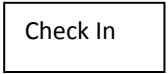
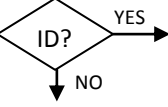

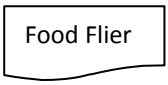
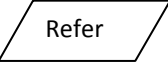



This tool contains:

- Directions for Creating a Flowchart
- Standard and Detailed Flowchart Symbols
- High-Level Flowchart Example
- Detailed Flowchart Example

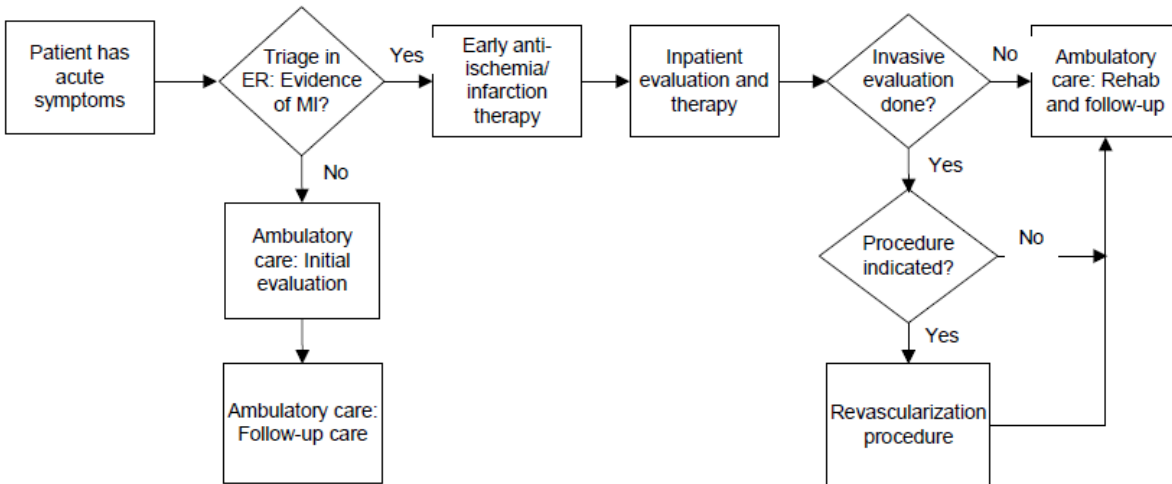
Directions for Creating a Flowchart

1. Get the “right” people in the room—those who know the process best.
2. Agree on the use of the flowchart and the level of detail required.
3. Decide on the format of the flowchart—high-level or detailed.
4. Define the first and last steps in the process (by observing, brainstorming, or consulting with the people responsible for each step).
5. Begin documenting the process steps in sequence. Note that some steps are parallel—that is, they happen at the same time. Describe the process as it really exists, not the ideal. Include what happens when there are problems in the process. *(Tip: Self-adhesive notes are a flexible way to document steps, using one note for each step. This allows you to easily change the order or add new steps.)*
6. At decision symbols, choose the most natural branch and continue to the end.
7. Use “clouds” or notes for unfamiliar steps and continue to the end.
8. When you reach the last step, go back to fill in the branches.
9. Read through the flowchart to check for accuracy and completeness.
10. Assign action items to fill in unfamiliar steps and verify accuracy.
11. When the flowchart is complete and accurate, analyze it, use it, and keep it up to date.

Standard and Detailed Flowchart Symbols

| Standard Flowchart Symbols | | |
|--------------------------------------|---|--|
| Start/End (terminator symbol) | The terminator symbol marks the start or end point of the process. Usually contains the word “Start” or “End” within the symbol. |   |
| Flow Line | Line that indicates the sequence of steps and direction of flow based on the direction of the arrow head. |  |
| Action Step | A box can represent a single step, or an entire sub-process within a larger process. |  |
| Decision Point | A decision or branching point. Lines representing different decisions emerge from different points of the diamond. |  |
| Connector | Indicates that the flow continues where a matching symbol containing the same letter (illustrated as “A” here) has been placed. |  |
| Detailed Flowchart Symbols | | |
| Document | Used in a detailed flowchart to indicate a specific printed document or report. |  |
| Input/Output | Used in a detailed flowchart to represent information entering or leaving the system/process, such as documents received via mail (input) or referral slip provided (output). |  |
| Delay | Used in a detailed flowchart to indicate a point in the process where there is an expected delay, such as waiting in the lobby for the next available staff member. |  |
| Database | Used in a detailed flowchart to indicate a specific database used in the process, such as IWIN. |  |
| Cloud | Used in a detailed flowchart to make note of unfamiliar, undefined, or intermittent steps in the process. |  |

High-Level Flowchart Example: Ischemic Heart Disease Patient Flow



Detailed Flowchart Example: Medicare Billing Process

