

Flowchart

Participant training objectives:

- To understand how flowcharts are used during process investigation
- To be able to construct a flowchart

Target audience:

Quality improvement (QI) project team members and other staff involved in the process investigation phase of quality improvement projects

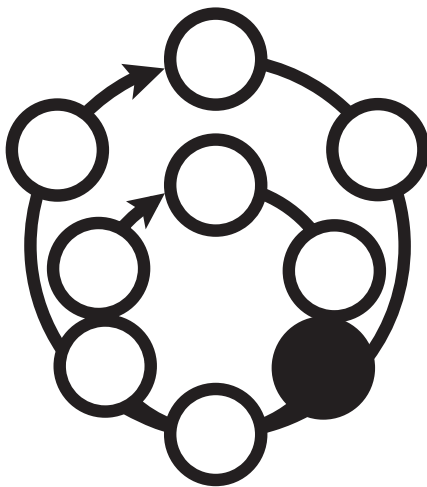
Type of exercise:

Scenario; group exercise, 60 minutes

Key concepts:

A flowchart, used to create a process "picture," is constructed using the following symbols:

- Oval: shows beginning or ending step in a process
- Rectangle: depicts particular step or task
- ← Arrow: shows direction of process flow
- ◇ Diamond: indicates a decision point



The Big Picture:

Flowcharts are an essential tool in the HIVQUAL model during Step 3 of the project cycle: Project team investigates the process. A flowchart is a picture of any process, whether it involves a sequence of events, steps, activities, or tasks. Flowcharts are drawn with standard symbols that represent different types of activities or tasks. They help employees visualize a process so that it is easier to understand and easier to improve.

SESSION AT-A-GLANCE	WHO	HOW LONG
1. Welcome, Learning Objectives, Agenda	Facilitator	5 minutes
2. QI Background: Flowchart Construction	Facilitator	10 minutes
3. Group Exercise: Scenario	Participants	30 minutes
4. Learning Transfer: Worksheet	Participants	10 minutes
5. Wrap-up	All	5 minutes
		60 minutes

Materials

For this group learning session, you will need the following materials:

- Participant handouts:
 - Example
 - Scenario
 - Learning Transfer Worksheet
 - Copy of slide presentation
- Flipchart paper and markers
- Overhead projector/LCD panel (optional)
- Wipeboard/chalkboard (optional)

Preparation

To prepare for the group learning session, complete the following tasks:

Familiarize yourself with the session's structure and content:

- Read through the Group Exercise notes in their entirety, including the exercise answer key, presentation slides, and participant handouts.
- Practice the presentation outlined in the Group Exercise notes.

Photocopy the Example, Scenario, and Learning Transfer Worksheet for each participant.

Prepare your presentation slides for display:

- Photocopy the slides, or write the slide content on transparencies or on flipchart paper.
- For display using an LCD panel, enter the content into a computer file.

Prepare the training room.

- Arrange the tables and chairs in a circle or square shape, if possible.
- Tear off flipchart paper and make sure you have enough markers for the group(s) to use during the exercise.
- Set up and test equipment (e.g. overhead projector), if applicable.
- Make sure you have enough chalk or wipeboard markers, if applicable.

Notes

Flowchart: Group Exercise

Welcome and Introductions

To begin the group learning session, welcome participants and thank them for their participation. If necessary, ask individuals to introduce themselves to the group.

Learning Objectives

Tell participants that by the end of the session they will:

- Understand how flowcharts are used during process investigation
- Be able to construct a flowchart

Agenda

Provide a brief description of the session's primary components:






- Presentation of how to construct a flowchart
- Group exercise on how to create a flowchart using narrative information
- Learning Transfer Worksheet

Quality Improvement Background

Begin by explaining that a flowchart is a picture of any process, whether it involves a sequence of events, steps, activities, or tasks. Flowcharts help staff members visualize a process so that it is easier to understand and easier to improve, and identify potential sources of problems and solutions.

Example

Distribute the Example to each participant and explain how flowcharts are drawn with a standard set of symbols, shown at the top of the handout:

-   Oval—appears at the very top and very bottom of the flowchart to show the process' beginning and ending points. The activity or event signifying the beginning or ending is written inside the oval.
-  Rectangle—shows any single step in the process. A brief description of the activity and who completes it appears inside the rectangle.
-  Arrow—connects steps and shows direction of process flow.
-  Diamond—shows a decision point from which the process branches into separate paths. A question appears inside the diamond and the path taken depends on the answer to the question.

Walk participants through the example, reviewing the symbols as you go.

Getting Started

Divide the participants into teams of roughly equal size, 4-6 people per group. You can assign participants to teams yourself or ask them to count off by a given number and form teams with other participants who have the same number.



Scenario Group Exercise

Distribute the scenario to each participant and provide directions for completing the exercise:

- Read the scenario individually.
- As a group, create a flowchart on the flipchart paper for the clinic's routine follow-up appointment process using the information provided in the dialogue. (20 minutes)

Assist teams who have problems getting started or become stuck on a particular point. Alert participants when 5 minutes remain so that they are adequately prepared to report back.

Reporting Back

Call time and select one team to walk through the flowchart steps. Ask other teams if they have anything to add, and then share any points from the answer key that the teams have not addressed.

Ask participants to pretend that they are on the improvement team and to identify what area(s) they would focus on next to improve the follow-up appointment process.



Learning Transfer Getting Started

Distribute the Learning Transfer Worksheet and give participants 10 minutes to complete it.

Debrief

If time permits, ask participants to individually share their flowcharts with the group.



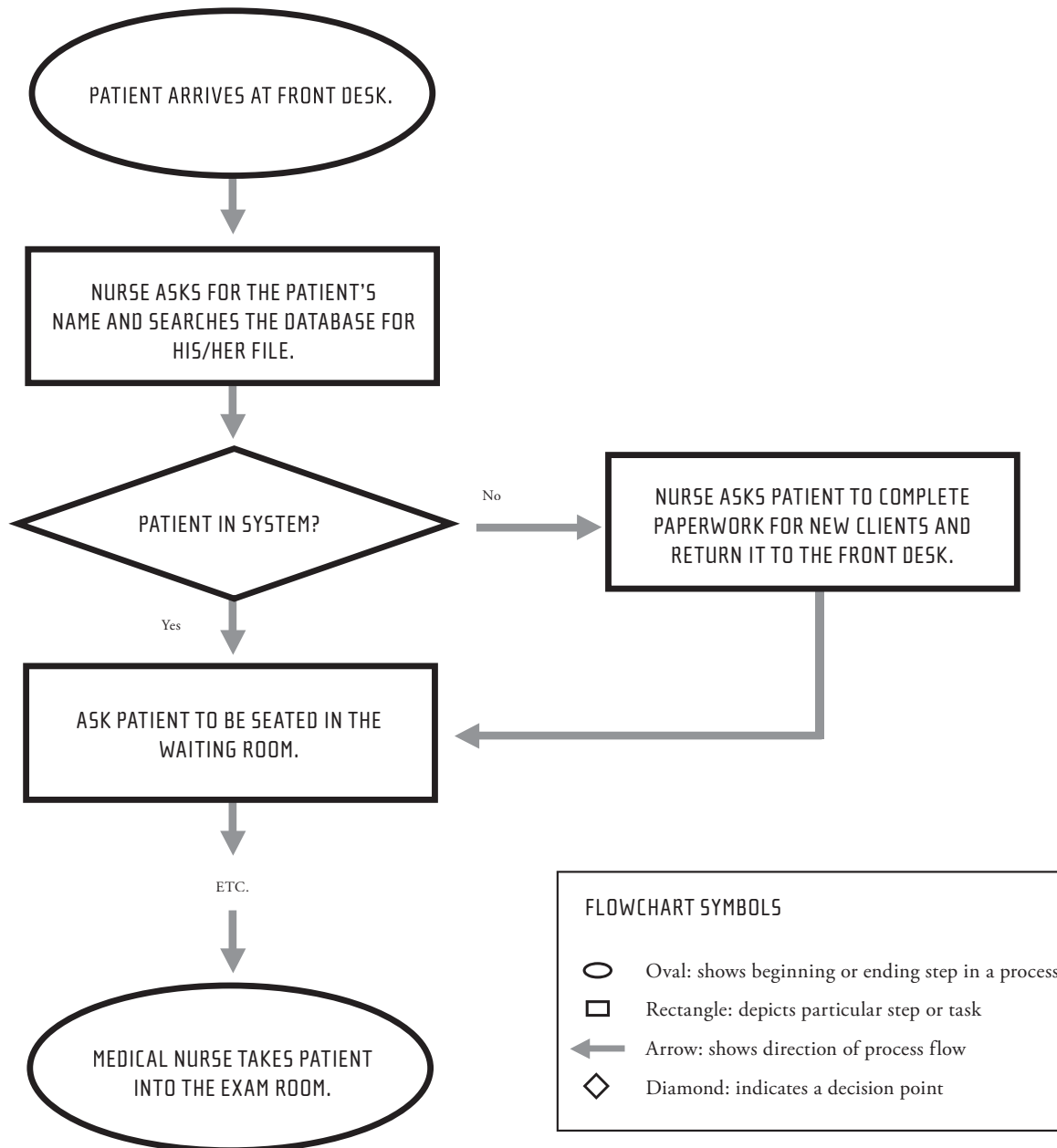
Wrap-up

Ask participants to provide feedback on whether or not they have achieved the objectives introduced at the beginning of the group learning session:

- To understand how flowcharts are used during process investigation
- To be able to construct a flowchart

Schedule an informal follow-up session with any participant(s) who has not reached the objectives.

Flowchart: Example of Patient Intake Process



Flowchart: Scenario

Instructions:

Read the scenario and create a flowchart for making routine follow-up appointments based on the staff members' dialogue. Draw the flowchart on flipchart paper, making sure it reflects how the process is, not how it should be. Instructions: Read the scenario and create a flowchart for making routine follow-up appointments based on the staff members' dialogue. Draw the flowchart on flipchart paper, making sure it reflects how the process is, not how it should be.

Background

A project team has been formed to improve a facility's process for making follow-up routine medical appointments. The team members include:

- Dr. Mark Jensen—Medical Director
- Anne Nicholson, RN—HIV Nurse
- Ryan Clark—Sign-Out Clerk

After initial data collection, the team meets to flowchart the process. Three members describe the process as follows.

Dialogue

ANNE: When patients leave the exam rooms, providers enter the number of weeks for the follow-up appointments in our new electronic medical record system. That's our policy.

MARK: When my patients leave, I normally finish my patient notes and I could not figure out how to access the specific computer screen to enter the number of weeks. Usually, I write the weeks on a piece of paper and give it to the patient to show to the sign-out clerk.

ANNE: I always use the computer.

RYAN: When patients come to me, I ask for the last name and look the patients' record up in the computer. When the amount of weeks is not entered I ask the patient when the doctor said that they should come back.

ANNE: What do you do if the patient does not know?

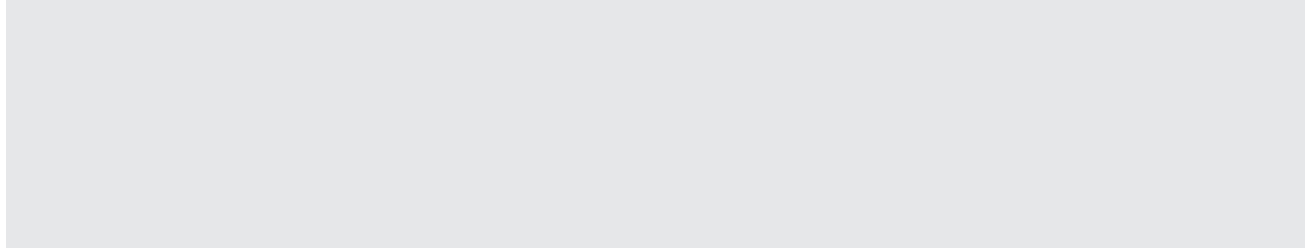
RYAN: Then I have to leave the sign-out area to find the doctor and ask him/her directly. Sometimes it takes me 10 minutes to find the provider.

MARK: But I give a piece of paper to all of my patients.

RYAN: Once I have the information, I go into our scheduling system and look up whether we have appointments for the requested week. I tell the patient a date. When patients are unavailable for this date, I try to find another date for them.

ANNE: Don't we print out reminder cards that include our new address for future appointments?

RYAN: We do, but the printer does not always work. Then we write the date down, and give the information to the patient.



Flowchart: Learning Transfer Worksheet

Instructions:

Use the space below to create a flowchart for one of your work processes. When finished, circle the area(s) that could be the focus of a future improvement project.

Flowchart: Answer Key

