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 Flowchart Symbols
- Sample High-Level Flowchart
- Sample Detailed Flowchart
Flowchart

Directions

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.
Flowchart

Standard Flowchart Symbols

- **Activity**: Take history
- **Decision**: Start?
  - Yes
  - No
- **Wait**: Wait to register
- **Flow Lines**: 
- **Cloud**: Lab testing process
- **Document**: Pharmacy Order
- **Database**: Member Database
- **Terminal**: Start
- **Connector**: A
Sample High-Level Flowchart: Ischemic Heart Disease Patient Flow

Patient has acute symptoms

- **Triage in ER: Evidence of MI?**
  - **Yes**
    - Early anti-ischemia/infarction therapy
    - Inpatient evaluation and therapy
  - **No**
    - Ambulatory care: Initial evaluation

- **Ambulatory care: Follow-up care**

- **Invasive evaluation done?**
  - **Yes**
    - Procedure indicated?
      - **Yes**
        - Revascularization procedure
      - **No**
        - Ambulatory care: Rehab and follow-up
  - **No**

- **Ambulatory care: Initial evaluation**

Sample Detailed Flowchart: Medicare Billing Process

- **Coding clerk tracks to processing**
- **Put in order, screen for deficiencies**
- **Deficiencies?**
  - **Yes**
    - **Clear deficiencies**
    - MD signs attestations
    - MD reviews
  - **No**
    - File
- **Supervisor closes in computer**
- **Record on medical shelf**
- **Supervisor distributes**
- **Track to desk**
- **Review record code and sequence using optimizer**
- **Abstracting (input to computer)**
- **Clerk prints attestations**
- **MD signs attestations**
- **MD reviews**
- **Supervisor pulls record and reviews**
- **Supervisor closes in computer**

ISSUE: MDs add info here
ISSUE: Original coder does not handle these
ISSUE: Data Record OK
ISSUE: info added here
ISSUE: Coding clerk tracks to processing
ISSUE: File
ISSUE: MD signs attestations
ISSUE: Supervisor closes in computer
ISSUE: MD reviews
ISSUE: MD signs attestations
ISSUE: Supervisors pull record and reviews
ISSUE: Original coder does not handle these
ISSUE: MD suggests changes
ISSUE: MD signs attestations
ISSUE: MDs and info here
ISSUE: May not have complete information at time of coding
ISSUE: Delays and interruptions can occur anywhere
ISSUE: Process includes full-time, part-time, piece-work, and outside agency coders