SAMHSA-HRSA Center for Integrated Health Solutions

Business Process Analysis Workbook For Behavioral Health Providers

Prepared for:

Substance Abuse and Mental Health Services Administration (SAMHSA) and the Center for Integrated Health Solutions (CIHS)

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> > 9/2013

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Introduction

The Business Process Analysis document is a snapshot in time of how an organization conducts day-to-day activities. It is comprised of the discrete Workflow Diagrams (Part 2) paired with the corresponding Business Process Narrative (Part 3).

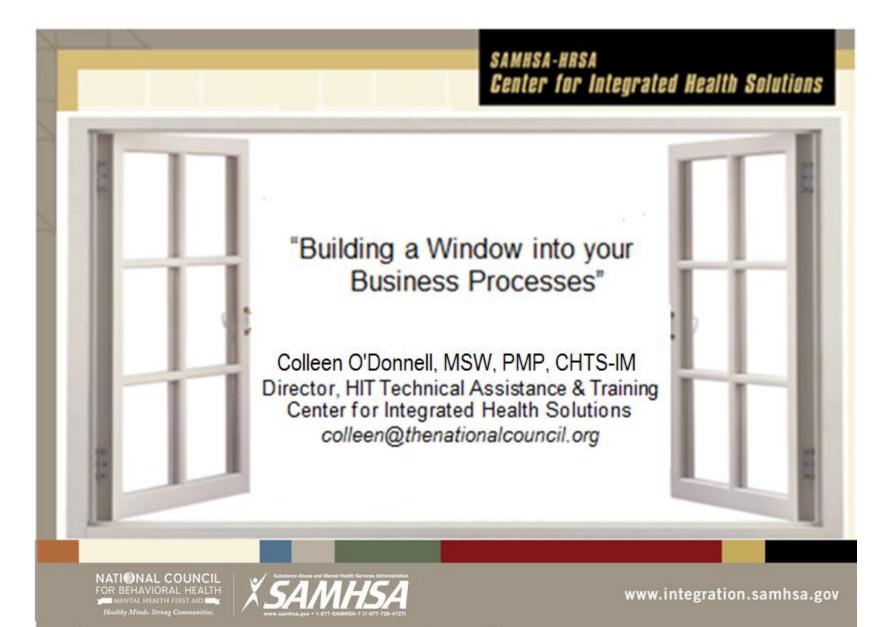
The finished product has enormous utility. It can be used to analyze activities for improved efficiency, effectiveness and quality of care, to validate agreement on how workflows should be conducted, for change management, PDSA, training, implementing the EHR, validating the configuration, conducting gap analysis, and for capturing the valuable analysis that naturally occurs when a workflow is first diagrammed. Part 1 of this work book provides an overview of how to build the Business Process Analysis in full.

The Business Process Narrative captures the discussion and comments that are made when the "As Is" workflow is diagrammed and the desired "To Be" state is conceptualized. There is a great deal of valuable information shared in these settings that will be lost if it is not recorded. For this reason, there needs to always be someone in the analysis processes who is responsible for monitoring and recording these insights, ideas, and critical information, organizing them into critique ("As Is") and vision ("To Be").

By the way, to make this workbook useful as a template for your organization, instructional text is included using textboxes like this one. When you are ready, you can delete the textboxes and start with a clean template.

Business Process Analysis Workbook

Part 1 (of 3) - Foundation Understanding the Business Process Analysis



Why look into your business processes?

- Efficiency, effectiveness and quality of care
- Impossible to know the "where" and the "how" until you know "what" you are doing now and "why" it is being done that way
- Unwise to start changing processes until you understand them

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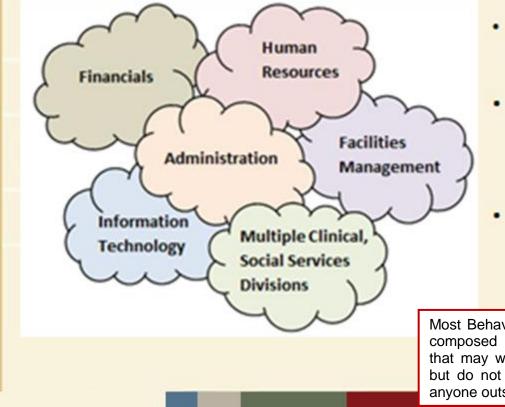
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How Behavioral Health Business Processes Evolve



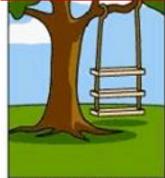
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- In response to system drivers
- In some degree of isolation from each other
- Over long periods of time and multiple staff turnovers

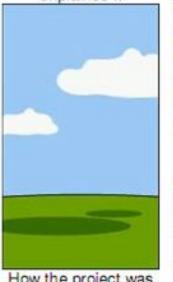
Most Behavioral Health Provider organizations are composed of multiple divisions and departments that may work well together where they intersect, but do not have a shared understanding of what anyone outside of their area does from day to day.

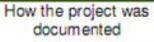
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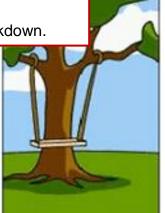
Since everyone is operating from a unique perspective and with incomplete information there are many opportunities for communication to breakdown.



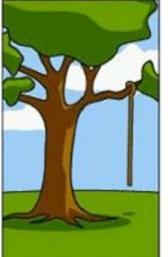
How the customer explained it







How the project leader understood it



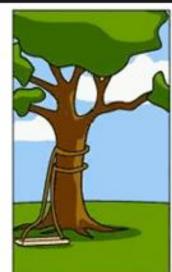
What operations installed



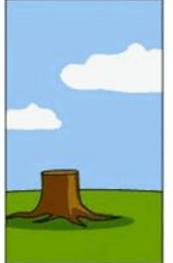
How the engineer designed it



How the customer was billed



How the programmer wrote it



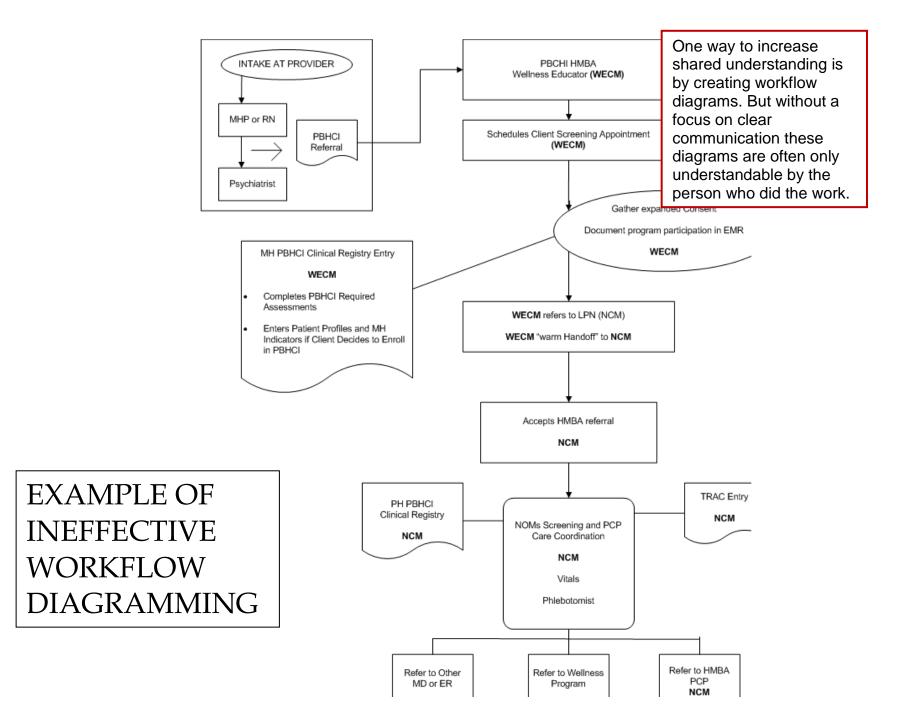
How the helpdesk supported it



executive described it

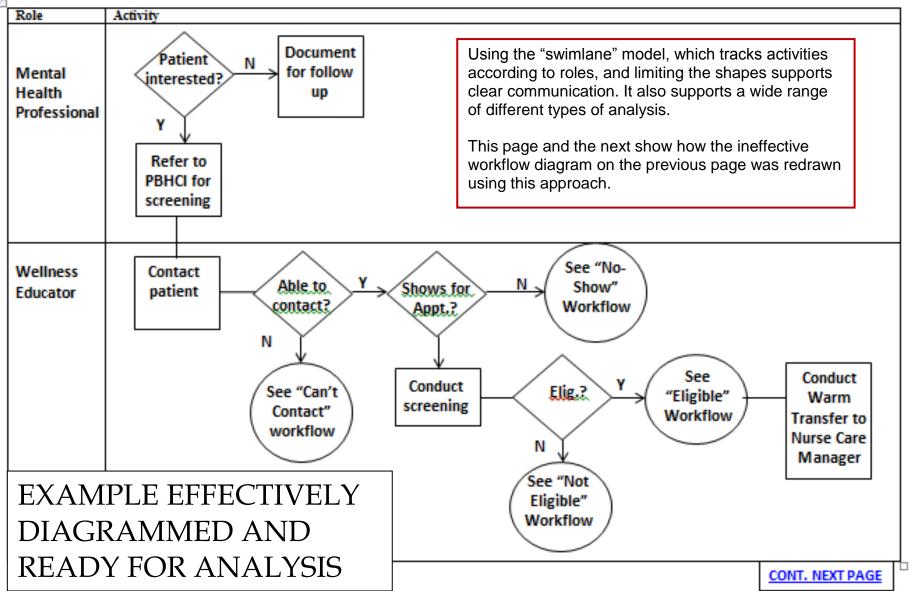


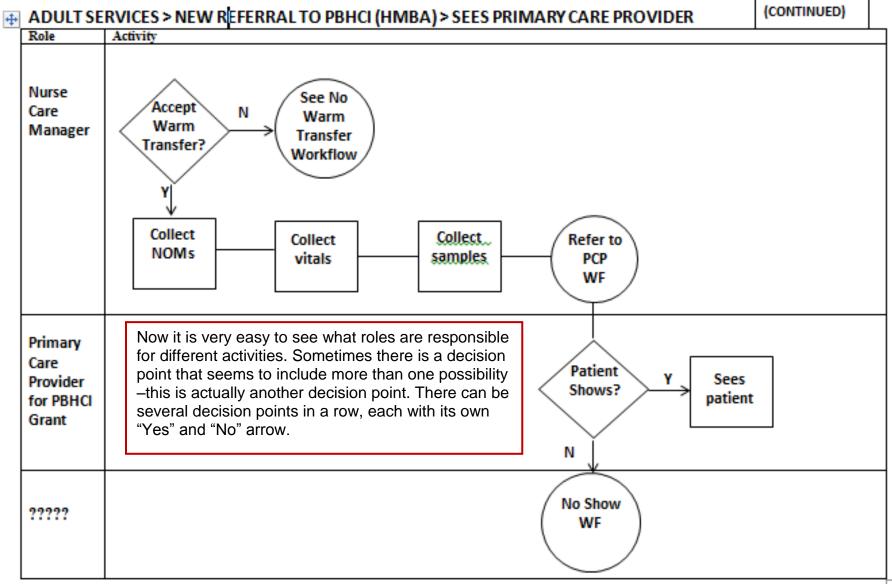
really needed



ADULT SERVICES > NEW REFERRAL TO PBHCI (HMBA) > SEES PRIMARY CARE PROVIDER







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Formal Business Process Analysis Supports Clear, Precise, Accessible Communication

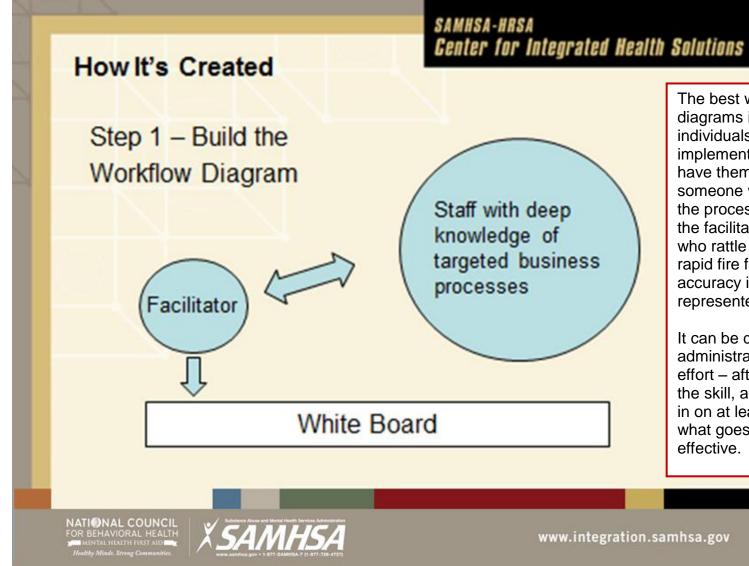
- Step-by-step financial, clinical and practice management activities
- Promotes cross-discipline understanding of each step
- Connects multiple dimensions –billing, data collection and reporting, clinical services, practice management, etc.

There is an "opportunity cost" associated with creating these workflows and conducting the analysis – but there are many valuable outputs from the process that pay dividends over a relatively short period of time.

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The best way to build the diagrams is to gather the individuals together who implement the workflows, and have them explain what they do to someone who is not familiar with the process. This person acts as the facilitator, slowing down staff who rattle off their daily routine in rapid fire fashion, and ensuring accuracy in the workflow represented in the diagram.

It can be difficult to persuade administration of the value of this effort – after staff have acquired the skill, administration should sit in on at least one session to see what goes on and why it is so effective. SAMHSA-HRSA Center for Integrated Health Solutions

Workflow Diagram – "As Is" snapshot of current business practices

a) Draw a swim lane flow chart and indicate the shapes

b) Select a discrete workflow with specific conditions

c) Identify all of the ROLES that are involved in the process

 d) Start identifying the discrete activities "What happens first...then what happens...then what happens next" (one activity per process box)

e) Diagram on a white board as you proceed, matching the process to the professional ROLE

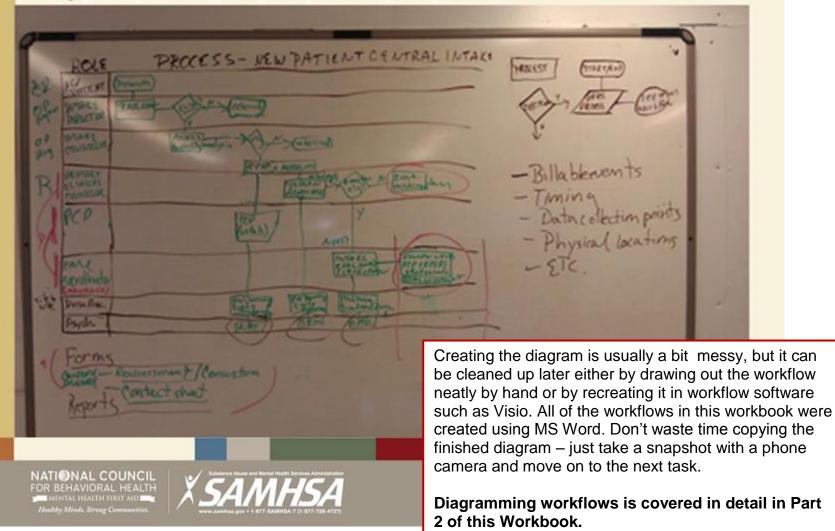
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The swimlane workflow separates the professional roles from the discrete activities. This allows for a very efficient analysis of tasks by credential and position description. For example, on page 10 we can clearly see that the Nurse is collecting and entering data. This is not an appropriate task for this role because they could be providing billable services instead, and the task can be completed by someone who costs less per hour and whose skills are a better match.

Snapshot of "As Is" Workflow

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EXAMPLE – Adult Services > New Patient > PBHCI (HMBA)

DE	FINE HIGH LEVEL WOP						
#	ROLE	ACTIVITY	"As Is" Comments	"To Be" Process			
				After analysis of the diagram, a "To Be" workflow is created and implemented using PDSA			
PBł	HCI > Ordering Labs > Pa	tient Fasted					
1	Mental Health Professional	Assess patient need and interest	Would benefit from better promotional materials	Develop materials available for MH professional to promote PBHCI			
2	Mental Health Professional	Refers to Wellness Educator for screening	Unnecessary step. If MH professional knows requirements, can screen at that time	Recommend MH professional familiar with program and conducts screening.			
3	Wellness Educator	Conducts screening	Referrals do not show up as expected, spending time on follow up, cant contact. Can task be accomplished by MH professional at time of visit?	Get baseline for # of no shows, and time spent in follow up. Recommend MH professional conducts screening			
4	Wellness Educator	Determines eligibility 1. Yes	Obtains consents and other documentation	 Confirm consents are necessary. May not be under HIPAA. MH professional can obtain at time of determination. 			
5	Wellness Educator	Determines eligibility 2. No	See "Not Eligible" Workflow. How is referral loop being closed with MH professional?	 The patient should not have to come into the clinic a second time only to be told not eligible. Counter- therapeutic. 			

As the workflow is being diagrammed, a great deal of valuable discussion goes on that has to be captured. There is identification of inefficiencies and barriers but also the generation of insights and ideas for improving the workflow. The vehicle for capturing this is the Business Process Narrative, composed as the workflows are actually diagrammed. The roles and individual activities are listed in the first two columns, the issues are identified in the third column labeled "As Is" and the ideas for improvement are identified in the last column labeled "To Be." **The Business Process Narrative is covered in detail in Part 3.**

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Step 2 - Build the Business Process Analysis Document

Translate

- Build the step-by-step narrative
- Include the roles
- Identify associated forms/EHRS screens/Reports
- Product is "Business Process (BP) Narrative"

Analyze

- For timing
- Billing
- Appropriate roles and role-related issues
- Data collection points
- Physical space

Since completing forms and the need to populate reports and patient charts drives so much of the workflow, there is space in the business process narrative to identify all of the forms and reports that are associated with that particular process.

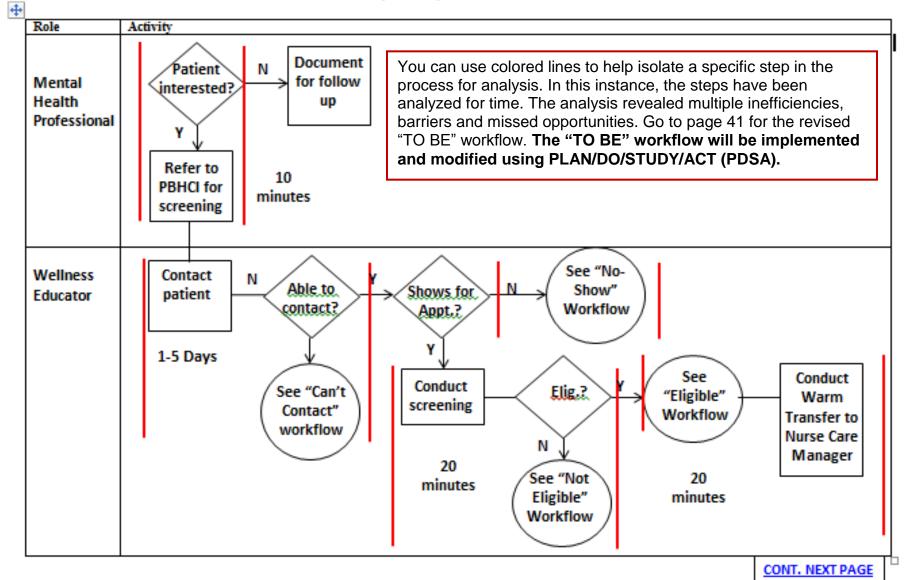
When the workflow is diagrammed, the analysis can begin. Resist the temptation to start analysis before the diagram is complete, and keep an eye on the clock.

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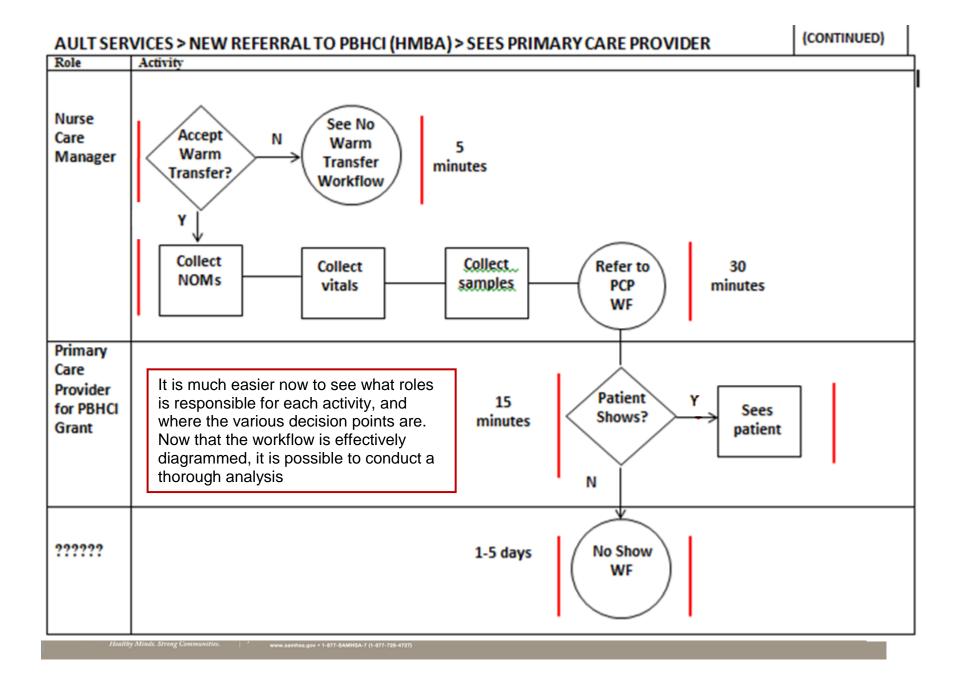


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ADULT SERVICES > NEW REFERRAL TO PBHCI (HMBA) > SEES PRIMARY CARE PROVIDER



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Analysis Examples

Timing

- How long are activities within the process taking?
- How much time passes between activities?
- How long are the patient contact intervals within Intake? Between Intake and Re-assessment?

Billing

- · What are the billable/non-billable events?
- Is there a way you can make non-billable events billable?
- How do these events match up to the appropriate license/credential of the role? Are you maximizing the amount of reimbursement?

Role License and Credentials

- Where and how are you meeting credentialing requirements?
- Do they match the billable activities?

NATIONAL COUNCIL FOR BEHAVIORAL HEALTH MINIMUM HEALTH FIRST AID Healthy Minds. String Communities. A single workflow can be analyzed for many different factors. For example, do the roles, credentials and activities match up? In the diagram on page 18 we can see that the Nurse (who is a Nurse Practitioner) is collecting and entering NOMs data and vital signs. If the physician was collecting vital signs instead, you would probably want to change that situation. Or, if you were analyzing for billing, you would notice right away that data collection and entry (NOMs) is not a billable service and the NP's time and (billable) skills should not be wasted in this way.

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More Analysis Examples

- Resources
 - Are licensed/credentialed (and therefore expensive) staff answering the phone when they could be conducting billable services?
 - Are particularly responsible staff being over-utilized?
 - Are two roles being implemented by one staff?
 - What happens when critical staff go on vacation or take leave?

Data collection points

- For the PBHCI grant?
- For Meaningful Use?
- For other reporting requirements and quality improvement activities?

Physical locations

- Does the physical layout support the workflow?
- Is one workflow being conducted over multiple locations? How does this impact the workflow?

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Reference the "As Is" Workflow Diagram to Create the "To Be" Blueprint

Create the New Narrative

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- Translate the analysis comments into the narrative
- Build a "To Be" workflow diagram
- Create the new "To Be" business process narrative
- This is your "blueprint" for making the changes

It is very important that the facilitator be allowed to effectively moderate the discussion. Otherwise, those involved will either quickly lose sight of the task and/or those in management will monopolize the analysis. In both cases, real information is lost and valuable time is wasted. Sometimes the facilitator must step in with a very strong warning to stop "off task" discussion and return to the task at hand.

There must be decision-makers at the table who have the authority to make changes in workflows, but the staff implementing the workflow must feel free to talk about what they actually do without consequences. Sometimes staff need to be drawn out to talk about workflows, but the effort is invariably worth it. They almost always have the best ideas for the "To Be" blueprint.

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Sources for Input Mirror the Organizational Structure and Drivers for Change There are ma

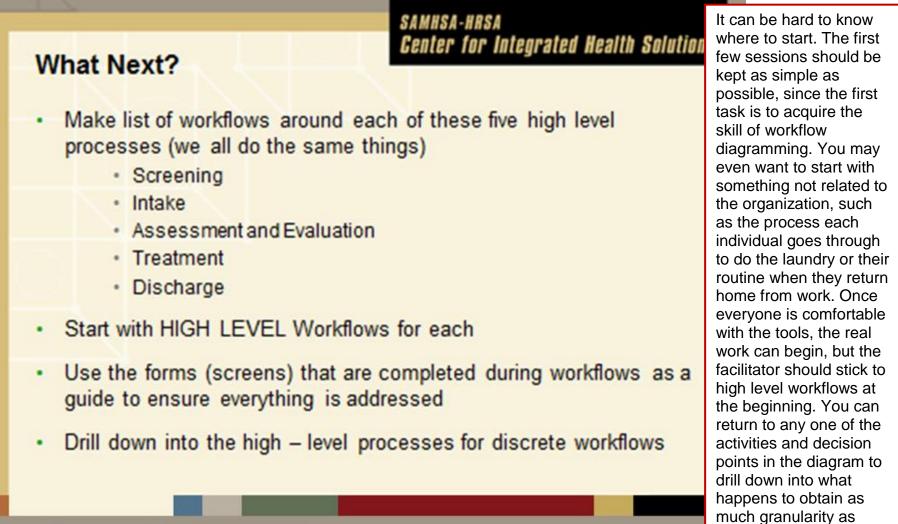
- Patient's perspective
- Organizational goals and objectives
- Line staff as well as leadership
- Documented policies and procedures (usually reflect licensing, certification, state and federal regulations)
- Forms and reports
- Billing practices and grant requirements

There are many sources for input into the analysis. Policies and procedures should be updated and available. Forms and reports should be on hand for reference. Since workflows are very closely tied to billing processes, an authority on the nuts and bolts of finance should be included. Workflows should not be designed to be optimal for staff - consult the organization's mission and values, then walk through the proposed "To Be" workflow from the patient's perspective. If you would hesitate to ask a close friend or loved one to navigate the workflow, it is probably built for the staff's convenience.

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What to Expect

Tips

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- Be prepared for tedious work the first few rounds staff get more skilled as you progress
- Ask questions as though you were going to step in and do the work yourself
- Be prepared with forms, organizational charts, updated policies and procedures
- Have an agenda and a time limit with processes outlined.
- Don't change processes until you have a full picture
- Follow staff around to see if this is what they REALLY do
- Avoid talking about the "To Be" state until you have finished the "As Is" snapshot, or you will waste time

Some staff like doing workflows and quickly become very skilled at it. Take advantage of this and ensure they have lead roles in the development of the Business Process Analysis document. Keep bored staff engaged by asking questions.

The typical questions that are asked in the development of the diagram are "What happens first," then, "What happens next?" and throughout the process "Is that what usually happens?"

Often an activity (for example, answering the phone) may have several possible answers to "what happens next?" Start with the answer to that question that is most common, and diagram it. You will find that with small modifications this can usually be used to illustrate all of the other possible answers.

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Business Process Analysis Workbook

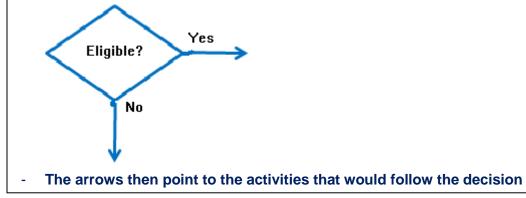
Part 2 (of 3) – Diagramming Workflows Using the "Swimlane" Workflow Diagram to Communicate and Analyze Discrete Workflows

Why "Swimlane?"

Swimmer's platform	Swimming pool
Michael Phelps	The "swimmer" stays in their lane. Only the patient moves from one lane to the next.
Ryan Lochte	In the "ineffective workflow" example on page 8, no one has a lane. Roles are hard to identify, and everyone is in the pool at what seem to be random places and at the same point in time. Decision points are not identified and there are multiple lines drawn from the same shapes. It very difficult to even understand what is going on, let alone effectively analyze it.

Tips for Diagramming Workflows

- Review the Part 1 Presentation
- Start by defining a high level workflow. The definition can be refined if necessary as you go.
- Create the Swimlane Diagram
- List the roles in the workflow.
- Remember just one line in and one line out of the rectangle and EHR activities, and the "See Other Workflow" circle.
- If you want to use more lines than that, you usually have a workflow within a workflow and need to use a circle, or else there is a Decision Point.
- Two arrows come out of the Decision Point labeled Yes and No. It usually looks like this:



DEFINE WORKFLOW

Role A	ctivity				
	· -				
		•			
	-				
		DECISION	Yes No	EHR	SEE OTHER
ACTIVITY		POINT	\longrightarrow	ACTIVITIES	WORKFLOW
		POINT			
Identifies a	Lines are				1.1.1.01
		Identifies	Arrows are	Activities	Workflow
single	used to	Decision Points	used to	completed	embedded
activity in a	connect	in a series of	connect the	by the EHR	in a high
series of	shapes to	Activities. Only	Decision	(i.e.,	level
activities.	each other	shape that uses	Point with	ePrescrib-	workflow
No more		-			
		arrows! One	Activities	ing)	(i.e., NOMs
than one		arrow marked			interview
line going		"Yes" and one			in example
n. No more		arrow marked			on page 10)
than one		"No"			
ine coming		INU			
					1

WORKFLOW FOR PRACTICE

Role	Activity
ACTIVI	TY DECISION Yes No EHR ACTIVITIES SEE OTHER WORKFLOW

WORKFLOW FOR PRACTICE_

Role	Activity
ACTIVI	TY DECISION Yes No EHR ACTIVITIES SEE OTHER WORKFLOW

(For Practice)

Workflow:

Role	Activity

Business Process Analysis Workbook

Part 3 (of 3): Business Process Narrative Capturing the Analysis of the "As Is" State to Create the "To Be" Conditions

EXAMPLE/TEMPLATE Business Process Analysis Document

Organization name Address Address

Prepared by: XXXX

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Example: Adult Services > New Patient > PBHCI (HMBA) REFINE THE HIGH LEVEL WORKFLOW	38
EXAMPLE: PBHCI > Ordering Labs > Patient Fasted LIST THE FORMS (OR SCREENS) AND REPORTS THAT DRIVE THE PROCESS	
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- This document is formatted for improved usability with functionality that comes with MS Word. Copy and paste the templates for each new workflow, updating the table headings as you go. As long as you are using a copy of the template tables, the title in the new pasted table will appear in the Table of Contents whenever you update it.

- To update, just click anywhere in the table, then select the Tab that appears on the top for "Update Table."

- You can also use the Table of Contents to quickly access any place in the document. To go to a section represented in the Table of Contents, just hold down the Control Tab and right click the title with the mouse.

Document Tracking

Revisions Date Changes		Changes
• Author/Editor		
Initial Draft	3/23/2012	First draft of all "Managing Patient Contacts" Business Process Analysis
o Jane Doe		
Revision 1	4/2/2012	Additional comments were included after clinical staff and medical staff analysis
o John Smith, Clinical		
Director		
• Mary Black, Medical		
Director		
Revision 2	4/9/2012	Inserted comments re: improving billing revenue
o Jim Dean, Financial		
Director		
Revision 3	4/15/2012	Approved final "As Is" Analysis
• Chris White Executive		
Director		

This table is used to track the review and approval of various sections of the document. The analysis usually goes through one or two iterations. Making certain that the right people are at the table when you diagram workflows can greatly reduce the amount of time spent on this task.

It is a good idea to get through the Business Process Analysis quickly. Requirements change, and people leave their positions. A new manager may decide they want to discard the work. Plan to complete the work in 6-8 weeks.

Post-Validation Changes

Date	Changes	
4/20/2012	Change made to documentation of patient warm transfer to Care Coordinator	Approved by XXXXX

Organizations are dynamic and the analysis is a static snapshot of what the organization does on a daily basis. There are almost always some changes that have to be made after the business analysis has been validated. If the analysis is completed in a short period of time (maximum two months) these post-validation changes will be a short list.

Introduction

Describe Project Scope and Time Frame

From the contract and statement of work, what is the project scope (what the contract says will be the product of the effort) and the time frame? Scope and time, along with cost, are the three most important ingredients to project success. Changing one usually impacts the other two, so any changes should be very carefully considered to avoid "scope creep," missed deadlines and deliverables, and cost overruns.

Business Analysis Process Participants

Who participated in the business analysis and requirements definition process? Tip: Always ensure that the necessary people are at the table in this process. Staff with institutional memory are particularly valuable, since they often have insight into why business is conducted in a certain way.

Name(s)	Date(s)	Processes

Organizational and Program Structure

If you decide to expand and apply this process to other facets of your organization, you will need to ensure that the appropriate divisions are identified in the validated document.

Division (i.e., Mental Health Services and name of Division Director)	Programs
Name of program manager	Name of program

Business Process Narrative

		/EL WORKFLOW		
		vices > New Patient > PBH	CI (HMBA)	
#	ROLE	"To Be" Process		
	EFINE THE HIGH	After analysis of the diagram, a "To Be" workflow is created and implemented using PDSA		
EX	AMPLE: PBHCI > Ord			
1	Mental Health Professional	Assess patient need and interest	Would benefit from better promotional materials	Develop materials available for MH professional to promote PBHCI
2	Mental Health Professional	Refers to Wellness Educator for screening	Unnecessary step. If MH professional knows requirements, can screen at that time	Recommend MH professional familiar with program and conducts screening.
3	Wellness Educator	Conducts screening	Referrals do not show up as expected, spending time on follow up, cant contact. Can task be accomplished by MH professional at time of visit?	Get baseline for # of no shows, and time spent in follow up. Recommend MH professional conducts screening
4	Wellness Educator	Determines eligibility 1. Yes	Obtains consents and other documentation	 Confirm consents are necessary. May not be under HIPAA. MH professional can obtain at time of determination.
5	Wellness Educator	Determines eligibility 2. No	See "Not Eligible" Workflow. How is referral loop being closed with MH professional?	2. The patient should not have to cominto the clinic a second time only to be told not eligible. Counter-therapeutic.

		EL WORKFLOW ices > New Patient > PBF	ICI (HMBA)	
#	ROLE	ACTIVITY	"As Is" Comments	"To Be" Process
6	Wellness Educator	Sees if nurse care manager is available 1. Yes	Warm hand off. Nurse Care Manager. How often does this happen? Is there any reason that the MH Professional can't make handoff? If yes, any reason they can't make appointment for patient for primary care?	Get baseline data on availability of nurse care manager. Free up valuable Nurse time (nurse is actually a nurse practitioner) to see more patients by removing responsibilities that can be conducted by less expensive staff. Eliminate barrier of Wellness Educator.
7	Wellness Educator	Sees if nurse care manager is available 1. No	When not available, makes appointment, usually a week out since nurse office hours are only Mon. and Wed. Not sure how many patients are lost in this interval.	Get baseline for no shows for Nurse Care Manager Appointment. Maintain focus on maximizing the services of nurse practitioner to see more patients
8	Nurse Care Manager	Collects NOMs	Nurse practitioner is also entering NOMs data into TRAC. Tasks do NOT match credential and licensing, are impacting availability to patient.	Reassign Tasks
9	Nurse Care Manager	Collects vitals	Nurses office and room where vital signs are collected two different spaces. Handwrites data then enters into EHR	Consolidate space.
10	Nurse Care Manager	Collect samples	Poor physical space, does not support this workflow. Blood glucose not fasting sample.	Revise space to better support workflow. Use HgA1c test for glucose.

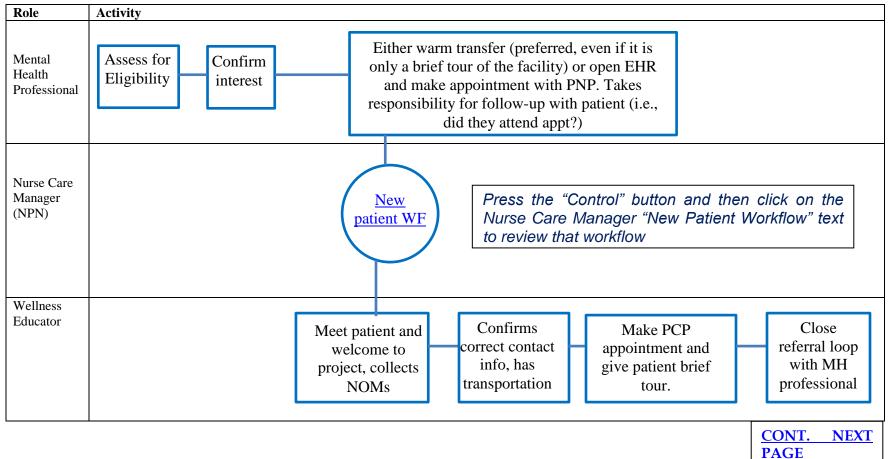
DEFINE HIGH LEVEL WORKFLOW Example: Adult Services > New Patient > PBHCI (HMBA)				
#	ROLE	ACTIVITY	"As Is" Comments	"To Be" Process
11	Nurse Care Manager	Makes appointment for patient to see PCP	Appointments are at least one week out. Some patients do not show. Spending time on calling and tracking down patients. 2 different locations.	Reassign task of making PCP appointment and free up time. Get baseline of patient no shows. Pilot Peer Support Specialists participation in helping patients make appts.
LIST THE FORMS (OR SCREENS) AND REPORTS THAT DRIVE THE PROCESS				
	Form Name	Where the form appears in the workflow (Line #)		

	workflow (Line #)	
Report Name	What data is collected in this workflow for the report?	

Notice that the table heading reappears at the top each time the table breaks to a next page. To change a heading, you must always go to the top of the table, where it was originally entered, and edit it there. Your edits will repeat in the heading row throughout the individual table. When you update the Table of Contents, the edits will be reflected there.

BUILD DIAGRAM OF "TO BE" WORKFLOW TO INCLUDE WITH ANALYSIS

ADULT SERVICES > NEW REFERRAL TO PBHCI(HMBA) > SEES PRIMARY CARE PROVIDER "TO BE WORKFLOW"



(CONTINUED)

ADULT SERVICES > NEW REFERRAL TO PBHCI(HMBA) > SEES PRIMARY CARE PROVIDER "TO BE WORKFLOW"

Role	Activity			
Peer support Specialist	Connects and introduces self, confirms stillEither Wellness Educator or Peer Support Specialist connect with patient post-appointment to 			
Primary Care Provider	Sees patient The "TO BE" Workflow will be implemented and modified as necessary using PLAN/DO/STUDY/ACT (PDSA)			
Compare this "TO BE" workflow to the analysis of the "AS IS" workflow diagram (page 17), and the comments captured during the "AS IS" workflow analysis process in the Business Process Narrative (page 38). Then answer the following questions: a) Does the proposed new workflow remove barriers, correct inefficiencies and better leverage opportunities? How?				
b) Doe	b) Does it address the comments in the business process narrative? Identify three comments that are addressed:			
c) Is it	c) Is it more respectful of the patient? Does it support their involvement? In what ways?			
d) Doe	es it better support mental health professional involvement? How?			

You can use the template table below to capture the narrative for additional workflows. Just copy the template table, paste it to the document, and fill it in. As soon as you update the table of contents you will see the table listed there. Add rows to the table as needed.

		INESS NARRATIVE T		e)	
#	ROLE	ACTIVITY	"As Is" Comments		"To Be" Workflow
RE	FINE WORKFLOW				
LIS	ST THE FORMS (OR SCI	REENS) AND REPORTS THA	T DRIVE	THE PROCESS	
	Form Name	Where the form appears in the workflow (Line #)			
	Report Name	What data is collected in this			
	F	workflow for the report?			

TEMPLATE SWIMLANE AND SHAPES for WORKFLOW

(Make a copy of this to work in so you always have a blank swimlane – copy and paste shapes as needed)

Role	Activity
	If you clicked on "NPN New Patient Workflow" in the previous diagram, it would
	bring you here to this table – this illustrates the idea is that you can internally link "See (name of) Workflow" to that particular workflow in the doc.
ACTIVI	TY DECISION Yes No EHR ACTIVITIES SEE OTHER WORKFLOW