

Facilitator's Guide: Creating a Map of Your Current System

BACKGROUND

Purpose:

- The value stream map will help your team visually display the current clinical workflow as it relates to adolescent patient visits. Creating the map will help your team identify opportunities to incorporate best practices for sexual activity assessment and chlamydia screening within the workflow.

Time:

- **Individually:** ~ 60 minutes to **observe an adolescent patient visit.** (Each QI team member should observe at least one patient for a total of at least 6 patients. Observations should take place at the site where your team plan to test changes.)
- **Work as a Team:** ~1-2 hours to **create a value stream map** from adolescent patient visit observations. (Time to complete the map will depend on the overall length of the adolescent visit.)

Materials Needed:

- Patient Observation Data Collection tool
- Flip chart paper
- Post-it notes (yellow, pink, and blue squares and star shaped (if available))
- Sharpies/markers
- Tape

Input:

- Adolescent Patient Observations (each QI team member should observe at least one patient for a total of at least 6 patients). Use the Patient Observation Data Collection tool to document observations.

Output:

- Map of clinic flow for adolescent patient visits with ideas to improve sexual activity assessment and chlamydia screening. (The map should represent the adolescent patient visit for the site where you plan to test changes.)



Figure 1: Value Stream Map of Adolescent Patient Visits

STEP BY STEP INSTRUCTIONS

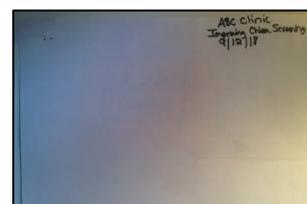
NOTE: Identify someone from your QI team to lead your team in creating the value stream map. This person will guide the QI team through the steps below.

1. Remind the QI team that the purpose of the map is not to document everything 100% accurately. Rather it is to get a “snapshot” of the typical adolescent visits. It’s okay if you do not document all variations of the adolescent visit.

2. Ask everyone to bring their completed **Patient Observation Data Collection** tool with them to the meeting. Everyone will refer to their observations as you create the map.



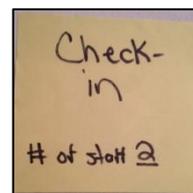
3. Hang three pieces of **flip chart paper** on the wall. Label the flip chart paper at the top right with the following pieces of info: 1) your practice name, 2) the title of the QI project: Improving Chlamydia Screening, and 3) the date the map is created.



4. Next, on a yellow sticky note, write **“Patient”**. Place the sticky at the center of the flip charts.



5. Next, on a yellow sticky note, write the name of the **first step in your clinic process** (e.g. “Check-in”). On that same sticky, indicate the # of staff who perform this process step. Place the sticky note on the left side of the flip chart. This will be the starting point for your map.



6. Ask everyone to describe the **3-5 key tasks** they observed during this process step (e.g. “Check-in”-verify name, DOB, and address, etc.). As your team describes their observations, capture the information on a long yellow sticky. Place this sticky note underneath the corresponding process step (Figure A).

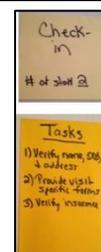
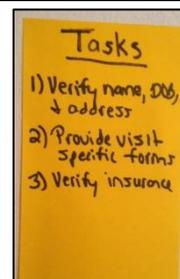


Figure A

7. Ask everyone to share the **amount of time** it took their patient to complete this process step (e.g. “Check-in”). Take an average time for all the observations. Write the average amount of time on a blue sticky note. Place the blue sticky note under the corresponding process step (Figure B).

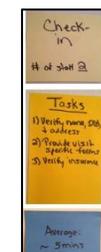
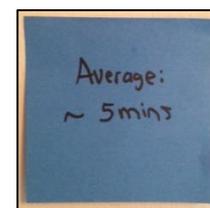


Figure B

8. Ask everyone to share their **improvement ideas for this process step.**

Ask the team to reflect on the 4 best practice categories: sexual assessment, screening, confidentiality, and creating a welcoming environment to help them identify additional ideas for improvement.

As each person shares their ideas ask them to write their ideas on a “star shaped” sticky note. Write only ONE idea per star. Place the “star shaped” stickies above the specific process step to which they apply (Figure C).

Repeat instruction steps 5-8 for the remaining clinical process steps (e.g. Intake, Provider Exam, Lab, etc.) until each step has been documented.

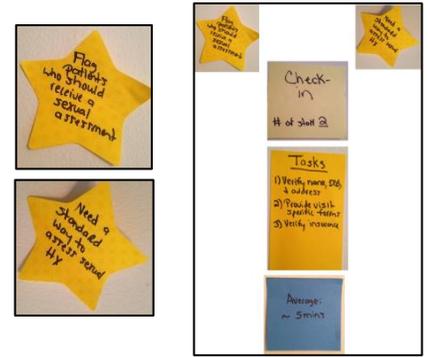


Figure C

9. Once you have completed documenting all of the process steps, go back and document any **waits/delays observed between process steps. Calculate an average of each wait time and document the averages on pink sticky notes.**



10. Once everything has been documented, ask if anyone has additional ideas about how to improve the process. If so document the new ideas on “star shaped” sticky notes and place them near the corresponding process step.

11. Optional Step (but strongly encouraged)

Ask all staff/providers from your clinic to review the map and add additional details. Also ask them to add ideas for improvement.

NOTE: Although it is optional, this is a great strategy to gain buy-in from all clinic staff.

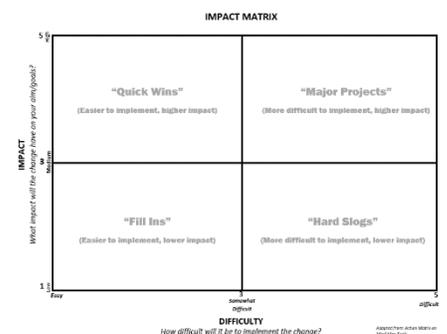
12. Optional Step (but strongly encouraged)

Take a picture of your map. Send the picture to stdqi@cdph.ca.gov.

NOTE: Although this is optional, the map will allow your CT eLC coaches to tailor their feedback to your specific process. It will also provide your team with a great visual of the overall clinic workflow.

Next Step after Completing the Map:

- It is time to **prioritize** which change ideas to test first.
 - Use the value stream map, your systems inventory, and staff/patient feedback to identify key opportunities for improvement
 - Brainstorm change ideas to address identified gaps
 - Use an Impact Matrix to prioritize which ideas to test first (see picture to the right). Rate each idea your team brainstormed on two criteria: 1) Impact on the overall aim and 2) Difficulty to implement (e.g. time, resources, buy-in). The ideas located in the top left quadrant (“Quick Wins”) should be considered priority.



RESOURCES

- To learn more about mapping, watch this short video: <https://www.youtube.com/watch?v=OCASVpQSFxc&feature=youtu.be>.
- To learn more about using an Impact Matrix to prioritize changes, watch this short video: <https://www.youtube.com/watch?v=IWljMGmA-44&feature=youtu.be>