weitzman institute inspiring primary care innovation

STRATEGIC RELEVANT FOCUSED

Quality Improvement Seminar

INTERACTIVE TEAMWORK

INFORMATIVE

FUN SKILL BUILDING

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January 8, 2026

Nurse Practitioner & Physician Assistant Training Programs

HAPPY
NEW YEAR

Session Goals

- Review details of how to approach flowcharting
- Share examples of strategies to consider when doing flowcharting
- Hear about and discuss the example of a process you chose to explore in detail

Roles

- Theory burst presenter
  - Mark
- Facilitator, timekeeper & technical genius
  - Emma
- Project update & take-home thoughts
  - Garrett

Agenda

- Welcome (5 minutes)
- Example of QI tools introduced to date (7 minutes)
- Garrett Project Update (7 minutes)
- Theory burst on flowcharting (10 minutes)
- Break (5 minutes)
- Small group discussion of flowcharting strategies (30 minutes)
- Summary and take-home points (5 mins)
- Preview of next session (10 minutes)
- Finding data (6 minutes)

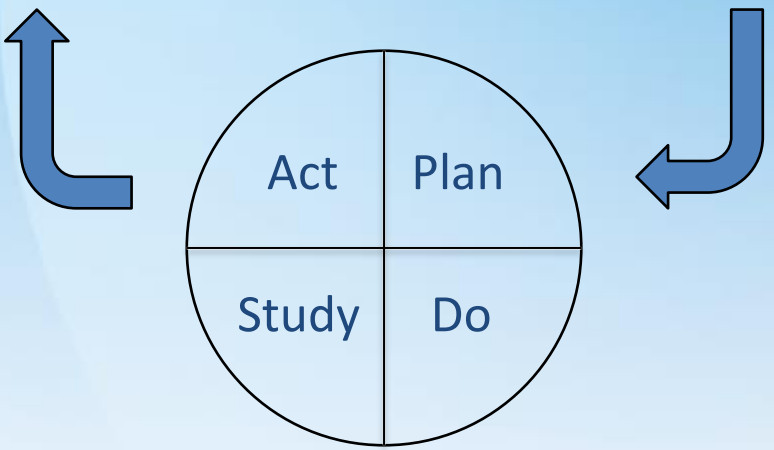
Curriculum Plan

- *An overview of Quality Improvement (10/9/25)*
- *Care Observations & Stakeholder Considerations (10/23/25)*
- *Organizing your Improvement Project (11/13/25)*
- *Global Aim and Fishbone Diagram (12/11/25)*
- **Process Mapping (Flowcharts) (1/8/26)**
- Measurement to Inform Change (1/22/26 & 1/29/26)
- An Approach to Testing a Change (2/12/26)
- Communication about your Improvement Effort (2/26/26)
- Stakeholder Analysis & Conflict Management (3/12/26)
- Managing Up and Gaining Leadership Buy-In (3/26/26)
- Negotiation (4/9/26)
- Negotiation and More About Cycles of Change (4/23/26)
- Sustaining your Improvement Effort (5/14/26)
- Resident Presentations (5/28/26, 6/11/26, 6/25/26)

Model for Improvement

- What are we trying to accomplish? (Aim)
- How will we know that a change is an improvement? (Measures)
- What change can we make that will result in improvement? (Change)

Three questions...

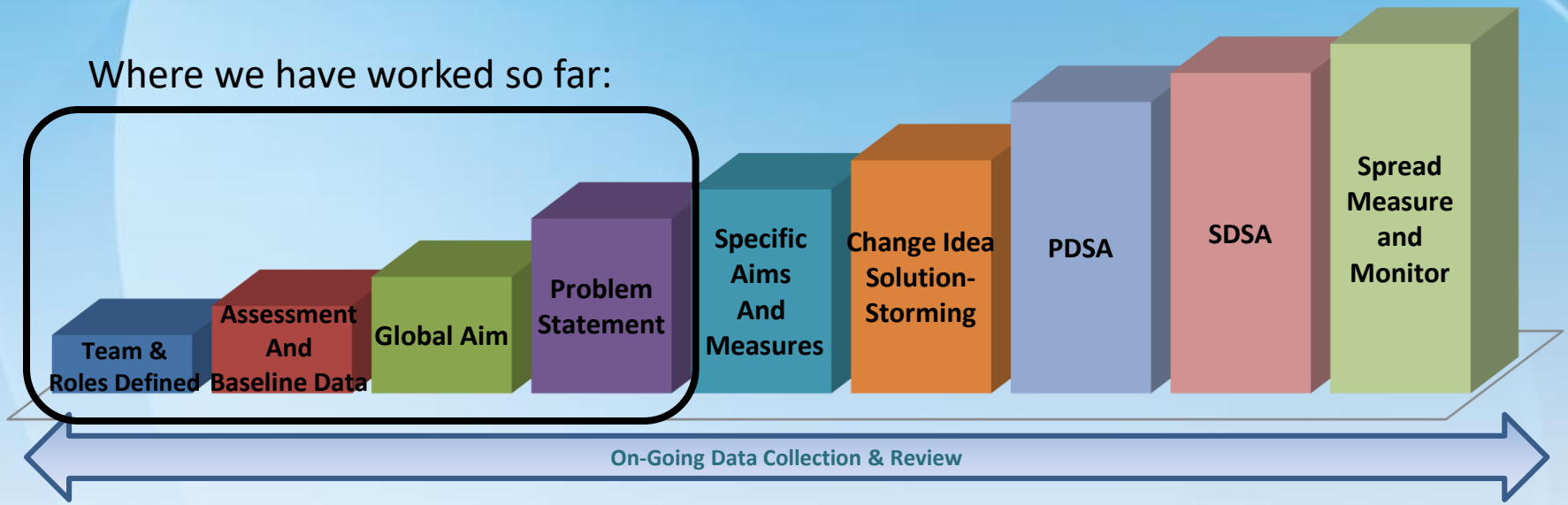


...coupled with an approach for testing change.

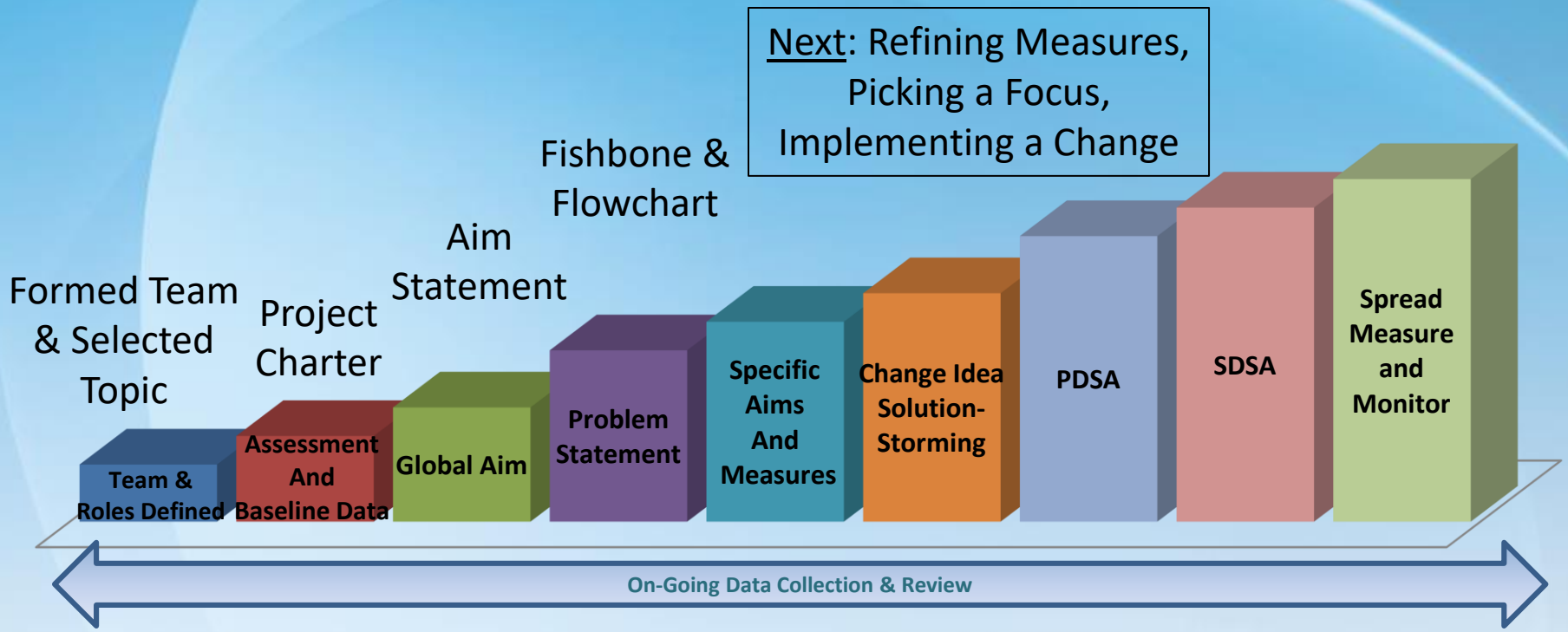
Langley GJ, et. al. The Improvement Guide (2nd Edition), 2009.

Review of Big Picture

Where we have worked so far:



Tools Introduced/Coming Next



Garrett's Project Update

- Insights related to:
  - ✓ Stakeholders
  - ✓ Causes
  - ✓ Process

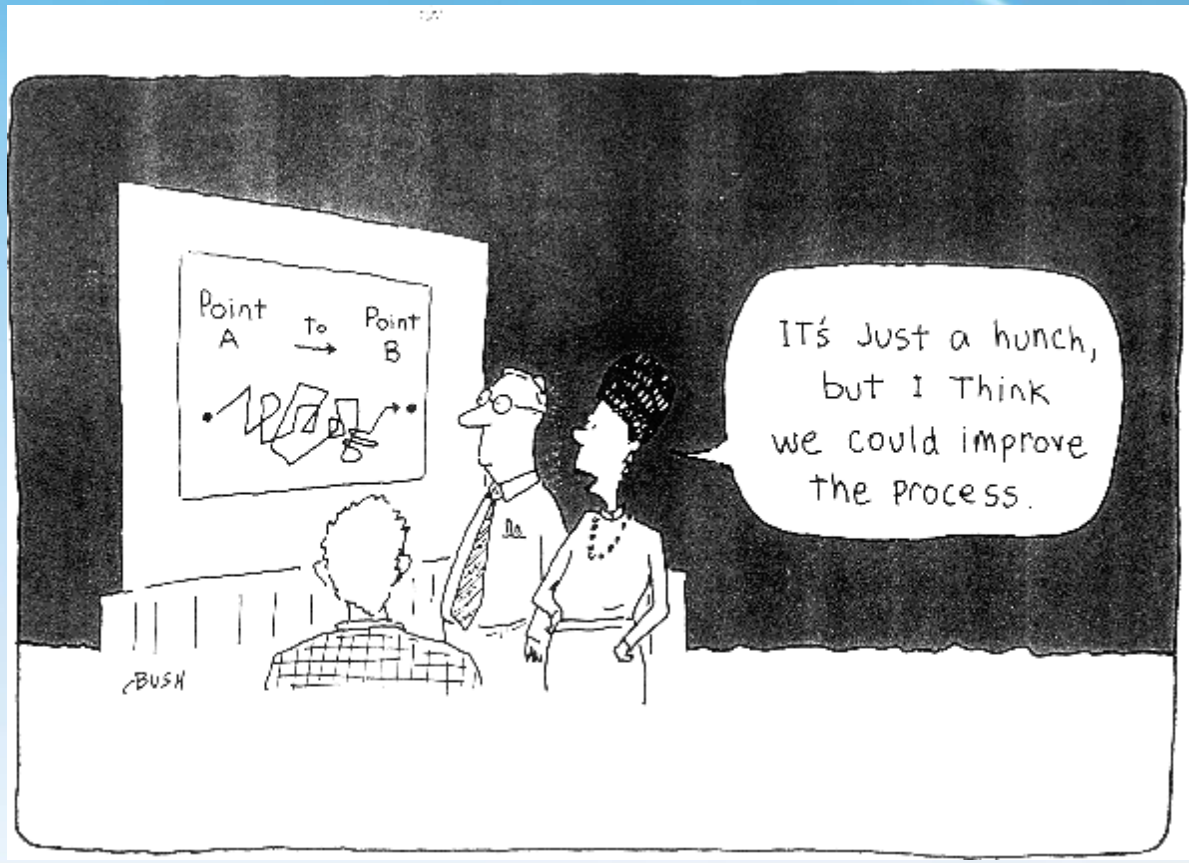
Poll Question

- Prior to your work on today's assignment, did you have any prior experience creating a flowchart (process map)? (select one)
  a. Yes, I have done this many times.
  b. Yes, I have done this once before.
  c. Somewhat, I am familiar with the tool but have not created one before.
  d. No, this is a new tool for me.

Thanks for sharing!

Flowcharting/ Process Mapping

Tips and strategies for using this tool



Morning Routine

What is a Process Map?

Process maps are used to visualize how healthcare, and its complex processes, are delivered. It is used for determining the step by step flow of the process, its timing, handoffs, and identifying outputs that can be visualized, measured, and studied.

(Marriott, 2018)

How does this help?

- Teamwork
- View of current work
- Identifies unwanted variation, waste, delays, and rework
- Generate ideas for improvement
- Document Processes
- Describe and understand the work
- Analyze and improve on processes

"You don't learn to Process Map. You Process Map to learn." - Dr. Myron Tribus

Getting Started

- ✓ Identify the people with ‘local knowledge’
- ✓ Identify purpose
- ✓ Choose a process
- ✓ Start and end points
- ✓ Think about the details
- ✓ Consider ‘walking the process’ yourself

Helpful Hints

Current process

Not what you <u>WANT</u> the process to be

Ask:

"What happens first", and "what happens next"

Use:

- *The flowchart template provided*
- *Copy/paste specific shapes that represent specific steps of the process (found on the next slide)*

Shapes

- **Start & End**: An **oval** is used to show the materials, information or action (inputs) to start the process or to show the results at the end (output) of the process.

- **Activity**: A **box or rectangle** is used to show a task or activity performed in the process. Although multiple arrows may come into each box, usually only one arrow leaves each box.

- **Decision**: A **diamond** shows those points in the process where a yes/no question is being asked or a decision is required.

- **Connector/Break**: A **circle** with either a letter or a number identifies a break in the process map and is continued elsewhere on the same page or another page.

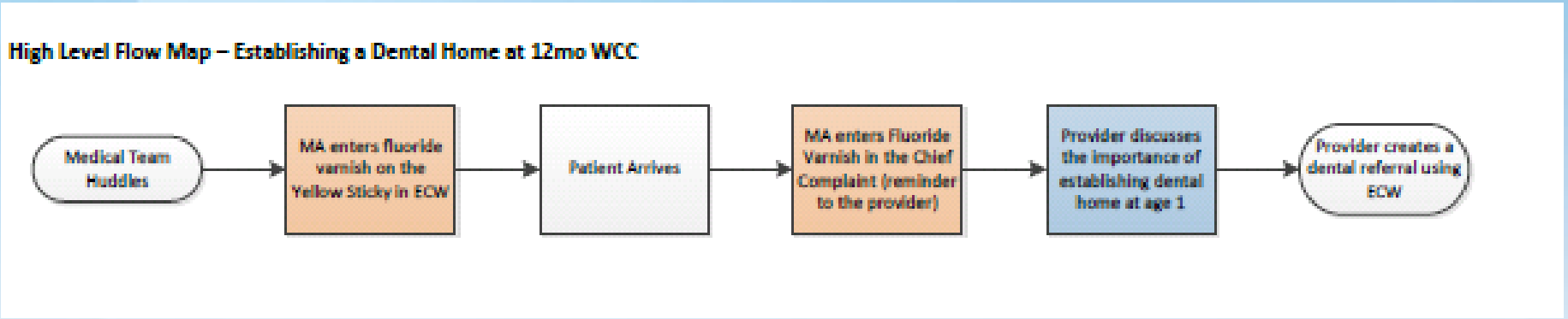
Cloud – represents the “Don’t know”

- **Arrow** – Process flow direction

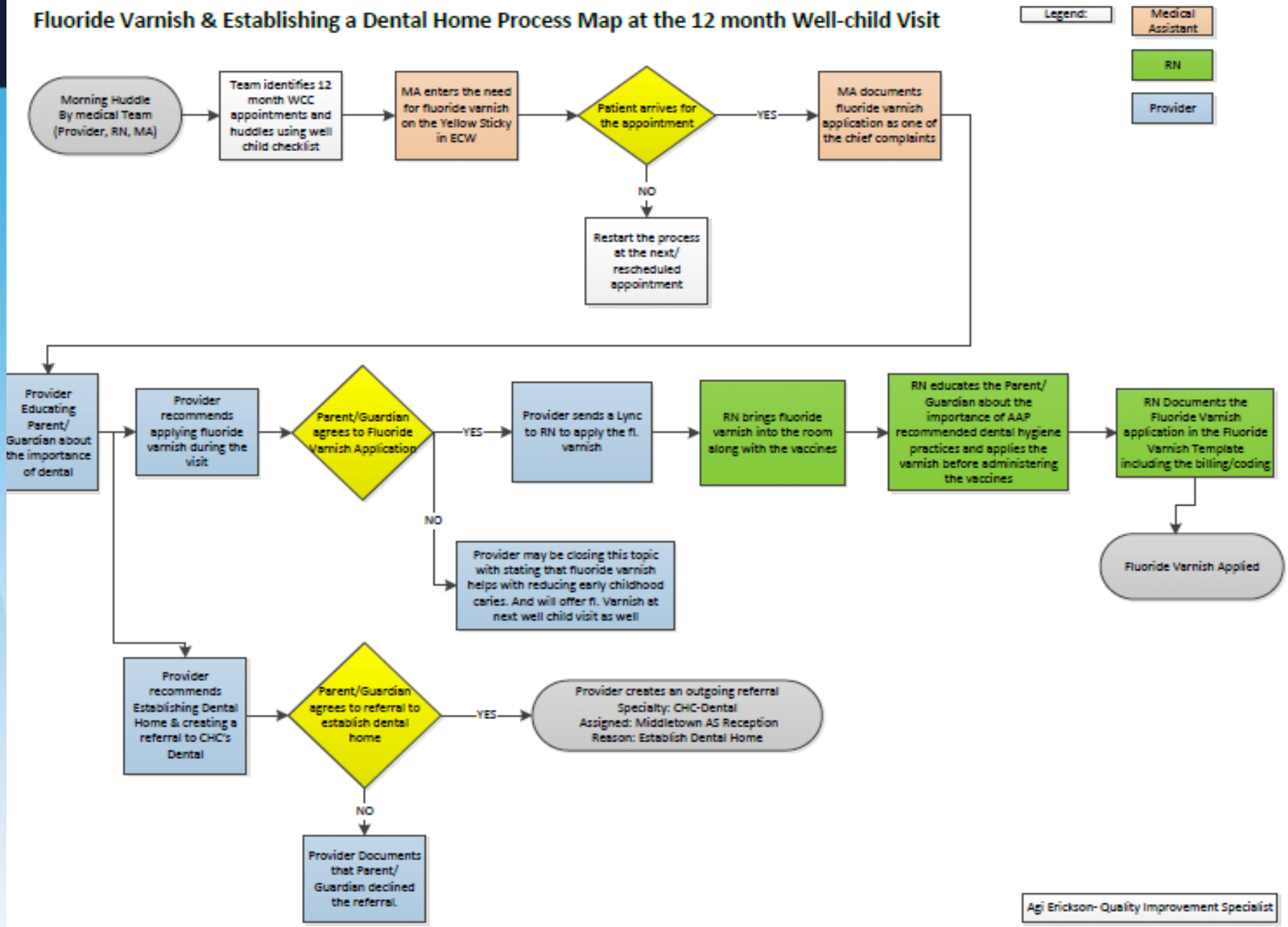
Level of Focus (Granularity)

The Big Picture – 30,000 feet

A high level flowchart is a good place to start process mapping



Fluoride Varnish & Establishing a Dental Home Process Map at the 12 month Well-child Visit



Agi Erickson- Quality Improvement Specialist

Break!

Take five minutes to recharge and refresh.

Flowchart Discussion

- We will break into project groups (15 minutes)
- Review your draft flowchart and make any enhancements you can think of based on today's discussion
- Consider the following questions:
  1. Who are the stakeholders for the process?
  2. How might you use the flowchart as a communication tool with stakeholders?
  3. What aspect of the flowchart might be ripe for further focus?
  4. What challenges or barriers do you anticipate in working on this process?
- Nominate someone from your group to share a brief summary of your project group's discussion

Small Group Flowchart Discussion

We will use breakout rooms for each team:

- DePaul CHC
- Holyoke HC
- Sun River Health
- CHC Hartford
- CHC Meriden
- CHC Middletown/NB
- MMG Via Verde
- MMG Group II
- Camino HC (Irvine)
- Yakima NHS
- Open Door
- CHC New London
- CHC PMHNP

Highlights from Project Groups

- Reporter's summary from some groups -- share 1 or 2 highlights from the discussion

Poll Question

- Which of the following best describes your team's experience in drafting your flowchart? (select one)
  a. We just winged it and figured it out.
  b. We watched one or more of the videos and had no problem generating a draft.
  c. We generated a draft, but got stuck in a few places.
  d. We found this hard to do and would like some assistance.
  e. Our experience is not captured in any of the options.

Thanks for sharing your information!

What haven't we figured out yet?

Questions or issues that remain unclear?

Take-home Thoughts

Garrett – share 1 or 2 ideas you will take away from our small group discussion

Summary

- You have learned about a framework to guide your thinking about how to organize improvement work
- Now we reviewed an important tool for quality improvement work – process mapping (flowcharting)
- Based on your submissions, it is clear you are already gaining new insights into the process by using this tool.
- Our next step will be to link measurement to the process and outcomes of the process

Upcoming Office Hours & Teams

- The next office hours will be on 1/15 from 11:30am-12:30pm EST.
- We have met with several project groups already.
- We would like to meet with the remaining project teams once during January or early February.
- Please let us know when your team would like to confer.
- This discussion will be for us to learn a bit more about your project plan and to think together how we can assist you in your work.

Upcoming Session VI Highlights

- Our next session will be on Thursday, 1/22/26
- We will discuss tips and strategies for finding and developing measures to enhance your understanding of an improvement effort
- We will break into small groups to discuss draft examples of measures related to your projects

Assignment for Session VI

- Review this Balanced Measures video as a group
- After watching the video, review your flowcharts and brainstorm which balanced set of measures to select using the Balanced Measures template
- Continue to revise your flowchart based on today's discussion, or additional ideas you have about the actual process as needed
- Send a summary of your set of measures for your process to Mark and Emma by Wednesday (1/21/26) at 6pm EST
- Contact Mark or Emma if you have questions or need assistance

Finding Data – UDS Website

Select State of Interest

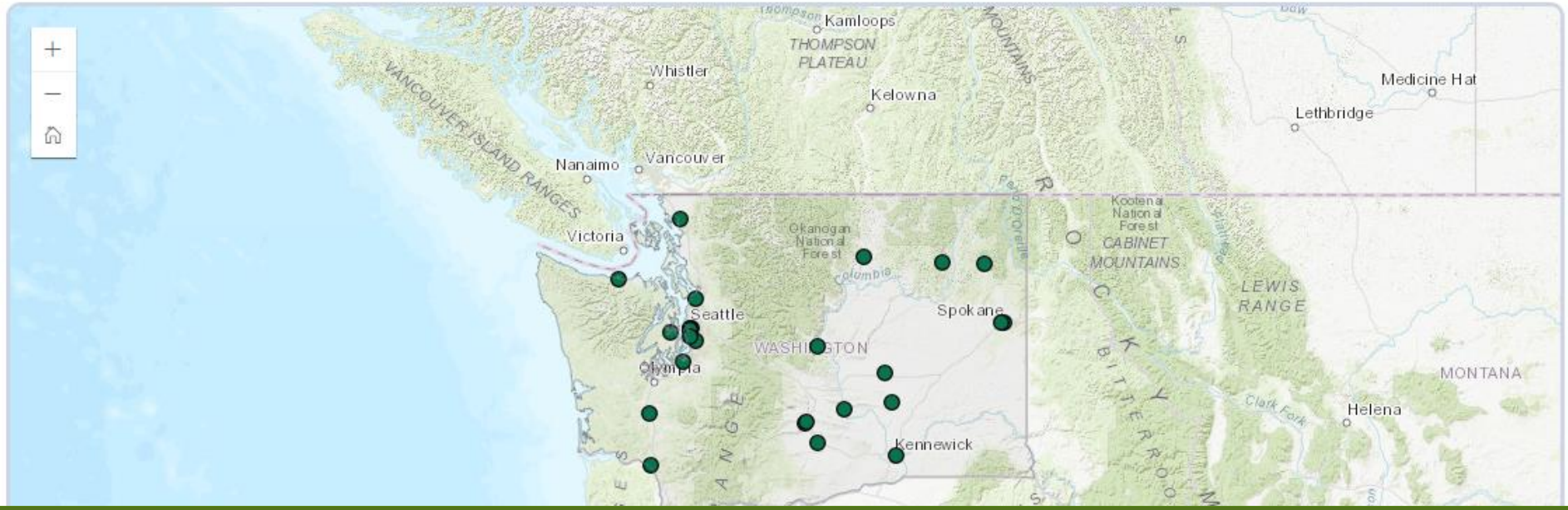
Select: (1) Health Center Program Type (awardee or look-alike); and (2) State/Territory

Select Health Center Program Type

Program Awardee Data

Select State/Territory

Washington



Select Health Center

Washington Program Awardee Data

2024 Program Awardee Data

Washington Program Awardee Data HTTP

Washington Aggregated Health Center Data ZIP

2024 Washington Health Centers

SEATTLE-KING COUNTY PUBLIC HEALTH DEPT Seattle, Washington	View Data
Seattle Roots Community Health Seattle, Washington	View Data
TRI-CITIES COMMUNITY HEALTH Pasco, Washington	View Data
UNITY CARE NORTHWEST Bellingham, Washington	View Data
YAKIMA VALLEY FARM WORKERS CLINIC ADMIN Toppenish, Washington	View Data
Yakima Neighborhood Health Services Yakima, Washington	View Data

Select Clinical Data

Yakima Neighborhood Health Services, Yakima, Washington

3-year project period; end date 04/30/2026 Service Area Map **Total Patients Served:** 21,402

Community Health Center Quality Recognition (CHQR) Badges

Age and Race/Ethnicity | Patient Characteristics | Services | Clinical Data | Cost Data | Program Requirements

Clinical Data	2020	2021	2022	2023	2024
Patients					

References

- Marriott, R. (2018). Process mapping – The foundation for effective quality improvement. *ScienceDirect*, 48(7), 177-181. https://doi.org/10.1016/j.cppeds.2018.08.010