THE PROVIDER 360 PROGRAM

MAP YOUR PROCESS | Job Aid

This resource provides guidance on how to map your process. Process mapping is designed to understand workflows—not evaluate individuals. It helps you see how work moves from start to finish, clarify responsibilities, improve communication, identify delays or rework, and uncover opportunities for improvement.

What Is a Process Map?

A process map is a visual outline of the steps involved in completing a process. It shows how work moves through a workflow, including key actions, decisions, handoffs, and outcomes. Process maps can help you:

- Understand how work is currently completed
- Identify gaps, delays, or unnecessary steps
- Improve communication across teams
- Support workflow improvement discussions

Before You Begin

Start by mapping the claims process from the first step through submission. Focus on understanding how the work flows today, especially in areas where delays, confusion, or rework occur. Helpful preparation questions:

- What part of the claims process are you mapping up to submission?
- Where does the process begin and end?
- Who is involved at each step?
- What systems, tools, or approvals are required?

Before you begin, use the questions above to clarify the scope of the claims process. Make sure all parties involved in the work—such as suppliers, team members who perform the steps, system partners, and any third-party contributors—are included in the mapping discussion.

Step 1—Identify the Supplier and the Start and End Points

Begin by identifying who supplies the input to your process. This helps you understand where the process truly begins. Next, identify the starting point of the process — what event or input triggers the work to begin.

Examples of suppliers:

- Skilled nursing facilities
- Doctors
- Hospitals

As you continue building the map, you will then identify the end point — the final output or action that shows the process is complete. Consider:

- Who provides the initial input or triggers the process?
- What outcome or deliverable marks the true end of the process?

Use the oval symbol [redacted] to show both the starting point and the ending point clearly on your map.

Step 2—List Major Process Steps

Write down the key activities in the order they occur. Focus on capturing the main workflow steps first before adding any details. Here are a few tips for documenting process steps:

- Keep descriptions simple and clear
- Use action-based wording when possible
- Focus on how the process works today

Use the square symbol to mark each process step and directional arrows ← → to show the flow of work.

Step 3—Identify Decisions

Look for decision points—places where the answer to a question determines what happens next and the process can follow different path.

Decision examples include:

- Proper documentation present
- Beneficiary eligible

Use the diamond symbol to mark decision points on your map and add "yes" and "no" labels to the arrows to show the direction of each outcome.

Step 4—Mark Waste in the Process

Review the process map with the team members who perform the work. As you walk through each step together, identify and mark where claim denials are happening by labeling the relevant steps or decisions with a red dot. This helps uncover the root causes of delays, rework, and other inefficiencies.

Questions to Ask:

- Does the map accurately reflect how the process works today?
- Are any steps missing, unclear, or duplicated?
- Where do handoffs or issues commonly occur?
- Are there points where work is frequently rechecked or redone?
- Do any steps consistently create confusion or bottlenecks?
- Are the systems, tools, and approvals shown correctly and in the right sequence?

Step 5—Identify Opportunities for Improvement (OFIs)

Use the process map to pinpoint where workflow improvements could reduce delays, improve quality, simplify steps, or strengthen communication.

You may identify opportunities to:

- Eliminate claim denials
- Reduce unnecessary handoffs
- Simplify approvals
- Eliminate duplicate work
- Improve communication between teams
- Reduce delays or rework

Use the burst symbol to clearly mark OFIs on your process map.

Helpful Tips

- Keep the process map simple and easy to follow
- Focus on mapping the current state first
- Involve team members who know the work well
- Use the map to guide discussion, identify waste, and develop OFIs
- After identifying waste and OFIs, create a future-state map to show the improved workflow
- Update the process map as workflows change over time

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