**Workflow Scope Template**

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| 1. **Process to be analyzed**:   Basic overview/title. |  |
| 1. **Why is this process being chosen to analyze?**   What brought up the desire to map the process? |  |
| 1. **Improvement SMART goal/target:**   (Specific, Measurable, Action oriented, Realistic and Time based) |  |
| 1. **Scope of workflow to be analyzed (clearly define start point and end point):** |  |
| 1. **EHR/Documentation system, module and / or applications involved**: |  |
| 1. **Items/equipment/devices involved in process**: |  |
| 1. **Physical locations involved in process**: |  |
| 1. **Staff/people involved in process**: |  |
| 1. **How will the process be mapped (swim lane, basic workflow, etc) using what method (discussion or observation)?** |  |
| 1. **Who will own the map once completed?** |  |
| 1. **Planned start date/target end date (of mapping exercise)** |  |

Materials Checklist:

* Flipchart
* Marker board
* Erasable markers
* Smart board
* Sticky notes
* Electronic documentation tool – Visio, Excel, Gliffy.com
* Map of workflow project area – blueprints or a simple sketch – several copies or blown up on projector screen, Smart board or marker board.
* EHR access to systems, screens, fields used during workflow
* Printer
* New product, device, equipment or supply item (if applicable)