



## Flowchart Template

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### 1. Overview of Flowchart

A **flowchart** is a visual tool that helps you map out the steps in your processes, from scheduling to treatment, allowing you to identify inefficiencies or gaps. It's particularly useful for understanding the patient journey and ensuring that your practice aligns with osteopathic principles of holistic care.

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### 2. How to Build a Flowchart

1. **Start with the Patient's Journey:** Begin by identifying the first step of the patient's experience (e.g., scheduling, intake) and map out each step until their treatment is complete.
  2. **Use Symbols to Represent Different Steps:**
    - **Oval:** Represents the start or end of a process.
    - **Rectangle:** Represents a task or action taken (e.g., "Enter patient details").
    - **Diamond:** Represents a decision point (e.g., "Is the patient new?").
    - **Arrow:** Shows the direction of the process, connecting steps.
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### 3. Example Flowchart Symbols

Symbol	Meaning	Example
Oval	Start/End of the process.	Example: Start: Patient schedules an appointment; End: Patient follow-up appointment.
Rectangle	Action or step in the process.	Example: Receptionist checks patient in, Doctor performs physical exam.
Diamond	Decision point (Yes/No).	Example: Is this a new patient? Yes: New intake, No: Standard follow-up.
Arrow	Direction of process flow.	Example: Connects each step of the patient journey, moving from scheduling to treatment.

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### 4. Sample Flowchart for Private Practice (Simple Patient Journey)

1. **Start:** Patient calls to schedule an appointment.
  2. **Decision:** Is this a new patient?
    - **Yes:** New patient intake form completed.
    - **No:** Proceed to standard check-in.
  3. **Step:** Patient checks in at the front desk.
  4. **Step:** Receptionist verifies insurance information.
  5. **Step:** Patient is roomed and waits for the DO.
  6. **Step:** DO conducts the osteopathic exam.
  7. **Step:** DO discusses treatment plan with the patient.
  8. **Step:** Patient schedules follow-up appointment.
  9. **End:** Patient leaves.
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## 5. Sample Flowchart for Clinic-Based Practice (Detailed Patient Workflow)

1. **Start:** Patient books an appointment online.
  2. **Decision:** Is the patient referred by another physician?
    - **Yes:** Process referral information.
    - **No:** Proceed to standard intake.
  3. **Step:** Patient arrives and checks in using an electronic kiosk.
  4. **Step:** Nurse performs initial assessment (vitals, history).
  5. **Decision:** Are further diagnostic tests required?
    - **Yes:** Schedule patient for lab work.
    - **No:** Proceed to consultation with DO.
  6. **Step:** DO conducts a full osteopathic exam and explains findings.
  7. **Step:** DO provides treatment or next steps.
  8. **Step:** Patient follows up at the front desk to schedule a follow-up.
  9. **End:** Patient leaves, receives follow-up care reminders.
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## 6. Template Table for Flowchart Creation

Use this table to map out your workflow before visualizing it in a flowchart tool (such as Lucidchart, Microsoft Visio, or hand-drawn):

Step/Decision	Description	Symbol
Start	Patient books appointment.	Oval
Decision	Is the patient new?	Diamond
Action	Receptionist checks patient in.	Rectangle
Action	DO performs an osteopathic exam.	Rectangle
End	Patient leaves and schedules follow-up.	Oval

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## 7. Steps to Implement the Flowchart

1. **List out each step:** Start by outlining the patient's journey through your practice.
  2. **Decide which steps are critical:** Focus on areas where inefficiencies exist (e.g., long wait times or unclear processes).
  3. **Map the flowchart:** Use flowchart software (or paper) to visualize the process. Include decision points and actions to make the flow easy to understand.
  4. **Analyze for improvement:** Once mapped, analyze where the bottlenecks or inefficiencies are happening and propose improvements.
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## 8. Benefits of Flowcharting

- **Clarity:** Visualizing the process makes it easier to see inefficiencies or gaps in patient care.
  - **Improvement Focused:** Helps to identify areas that lack integration with osteopathic principles (e.g., patient-centered care, holistic treatment).
  - **Team Collaboration:** Use the flowchart to communicate the process with your staff and align everyone on the improvement goals.
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## Instructions:

1. **Start with a simple process:** Map out the basic steps of the patient journey (e.g., from appointment scheduling to follow-up).
2. **Use the symbols:** Follow the standard symbols (oval for start/end, rectangles for actions, diamonds for decisions) to maintain clarity.
3. **Revise and improve:** Once you've mapped the current process, identify areas for improvement and add those to the chart.

## Steps to Create a Flowchart in Visio:

### 1. Open Visio and Select a Template

- Open **Microsoft Visio**.
- From the **Home** screen, click on **Flowchart**.
- Choose **Basic Flowchart** and click **Create**.

### 2. Set Up Your Flowchart

- On the left-hand side, you'll see a panel with flowchart symbols (called **Shapes**).
- Drag and drop the shapes you need into the blank workspace.

### 3. Add Shapes to Represent Your Workflow Steps

You can use the standard flowchart symbols. Here's a list of symbols you'll need:

- **Oval:** Start and End (use this for the first and last steps).
- **Rectangle:** Actions/Tasks (use this for each step in the process).
- **Diamond:** Decision points (use this to represent questions or conditions, like "Is this a new patient?").

### 4. Connecting the Shapes

- After placing your first shape (like the **Start oval**), drag and drop your next shape (e.g., a **rectangle** for the next action).
- **Connect the shapes** using arrows. Click on the shape, and small arrows will appear on the sides. Drag these arrows to the next shape to connect them.

### 5. Example Flowchart Setup

**Private Practice Patient Journey** (Example):

1. **Start (Oval):** Patient calls to schedule an appointment.
  2. **Decision (Diamond):** Is this a new patient?
    - Yes: Complete new patient intake form (rectangle).
    - No: Proceed to check-in (rectangle).
  3. **Task (Rectangle):** Receptionist checks in the patient.
  4. **Task (Rectangle):** Receptionist verifies insurance.
  5. **Task (Rectangle):** Patient is roomed and waits for the DO.
  6. **Task (Rectangle):** DO conducts the osteopathic exam.
  7. **Task (Rectangle):** DO discusses the treatment plan.
  8. **End (Oval):** Patient schedules follow-up appointment and leaves.
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## 6. Formatting the Flowchart

- **Text:** Double-click on any shape to add a label (e.g., "Receptionist checks in patient").
- **Resize:** Click and drag the corners of any shape to resize.
- **Color:** You can customize the color of each shape. Right-click on the shape, then click **Fill** to change the background color.

## 7. Export the Flowchart as an Image

- Once the flowchart is complete, you can save it as an image:
  - Go to **File > Save As**.
  - Choose a location, and from the file format dropdown, select **PNG, JPG, or GIF**.
  - Name your file and click **Save**.

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### Pro Tip: Using Visio Connectors for Clearer Diagrams

- **Use Right-Angle Connectors:** For a cleaner flowchart, you can use right-angle connectors (default) or curved connectors. Click **Design > Connectors** to choose the style.
- **Align Shapes:** Use the **Align** and **Distribute** features to ensure that your shapes are evenly spaced and aligned properly. Go to **Home > Arrange > Align**.

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### Example in Words:

Let's say you're creating the flowchart for a **Private Practice**:

1. Drag an **Oval** to your workspace for the "Start" shape. Label it "Patient calls to schedule an appointment."
2. Drag a **Diamond** below that and label it "Is this a new patient?"
3. Use **arrows** to connect the oval to the diamond.
4. For the "Yes" outcome, drag a **Rectangle** next to the diamond and label it "Complete new patient intake form."
5. For the "No" outcome, drag a different **Rectangle** and label it "Proceed to check-in."
6. Connect these shapes with arrows and continue until the process is fully mapped.
7. End the flowchart with an **Oval** labeled "Patient leaves."

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Once you follow these steps in **Visio**, you'll have a complete visual flowchart that you can easily export and use as an image for your toolkit.

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### Video Tutorials (if needed)

If you'd like additional help with using **Visio**, here are some video resources:

- **Basic Flowchart Tutorial:** [YouTube - Microsoft Visio Basics](#)
- **Flowchart Tips:** [YouTube - Tips for Creating Flowcharts](#)

