

# Success Stories

## How Pima Council on Aging Used Process Mapping to Improve Services

**A**ging and disability community-based organizations (CBOs) that are pursuing and/or engaging in health care contracting work must operate efficiently to lead successful partnerships and establish new relationships with health care entities. One way CBOs can attract and become more viable partners for health care entities is by properly managing data and workflows. This makes developing a comprehensive understanding of internal data systems, the data being collected and how this data can be leveraged important for any CBO seeking to improve quality and attract health care partners. This Success Story explores how one Area Agency on Aging (AAA) has used process mapping tools to streamline and improve its services.

### What is Process Mapping?

One way CBOs can illustrate system processes is by developing a customizable tool or diagram to help during internal decision-making processes and when determining how work should get done and by whom.

Mapping the path a client takes through your organization can help all levels of CBO staff understand the processes involved in delivering programs or services. These data or process maps can also be used to help define roles and responsibilities, particularly for processes that may involve multiple staff, data collection points and cross-departmental collaboration. In addition, creating and linking program and data flow charts can detail how exactly clients and data move through your organization. These visuals can help your agency identify and understand where it can improve data collection and service delivery, potentially enabling your CBO to reduce redundancies, save money and most efficiently use staff resources. Identifying steps in your agency's processes where information has the potential to get lost, misplaced or entered incorrectly

could justify changing workflow processes to increase efficiency without compromising integrity.

### Process Mapping in Action

**Pima Council on Aging** (PCOA), a AAA in Tucson, AZ, has used process mapping to visually describe the steps and tasks that are part of its operations as it streamlined processes and standardized data collection. PCOA hoped to purchase client-tracking database software, but first wanted to grasp what data it would need to feed into a new system and what data staff were entering into existing databases (e.g., Excel spreadsheets and the statewide Division of Aging and Adult Services Reporting System (DAARS) database) first. PCOA

#### PCOA was entering the following data on clients/consumers into existing databases:

- Name and contact information
- Demographics
- Activities of daily living (ADL)/Instrumental activities of daily living (IADL), nutrition, and other similar information through built-in assessments
- Units of service delivered: home delivered meals, homemaker services, case management, emergency response aids, shopping, etc.
- Congregate meal attendance as well as transportation provided to said meals
- Information & Referral/Helpline tracking for the main Helpline, Rights & Benefits, Major Home Repair, Family Caregiver, and some State Health Insurance Assistance Program (SHIP) services
- Major Home Repair services provided the Family Caregiver Support Groups

wanted a way to visualize how data was flowing across its many programs and where that data went once it was entered into a database (e.g., on to the agency’s finance team for billing). And because it was also important for PCOA to understand which staff would work with the new system, PCOA realized it also needed to assess workflow so it could formally align staff roles with its data entry needs.

Two diagrams developed by PCOA illustrate the process by which information flows through the agency to successfully deliver services. Diagram 1 depicts organizational workflow from the first contact point with a client to service delivery, from beginning to end. This visualization tracks how a client’s information is received and referred within the agency, what documents are needed to address client needs and how program staff provide services.

**Diagram 1: Workflow Chart**

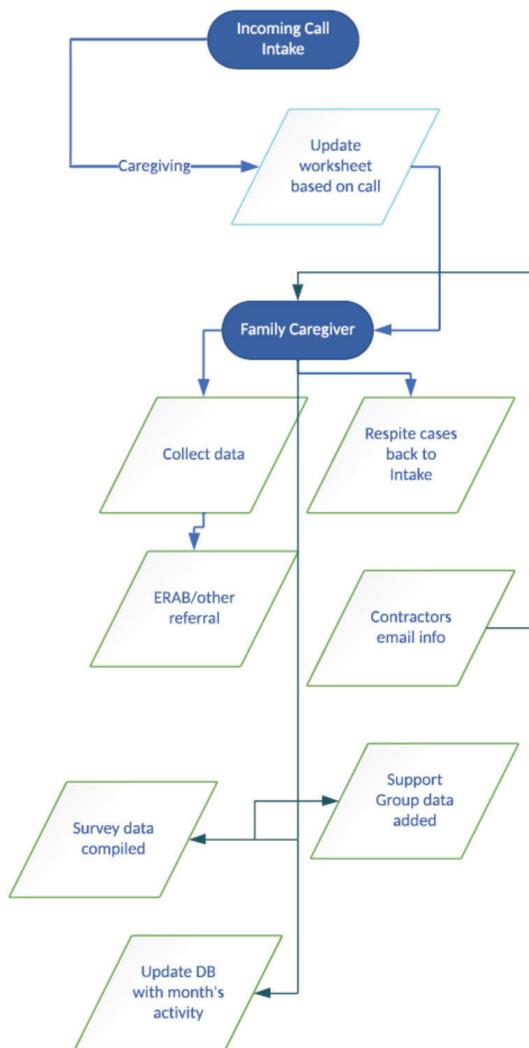


Diagram 2 shows the service groups and maps used by PCOA staff and identifies the number of data repositories the agency used. PCOA interviewed staff to understand which processes could be combined and what information was being duplicated to help the agency streamline its operations. An added bonus to this effort was the fact that the process was appreciated by PCOA staff because it gave them the opportunity to have their input considered as the agency sought to improve operations. Staff engagement and buy-in is an important part of any major change.

### Mapping the Impact of Improved Process Management

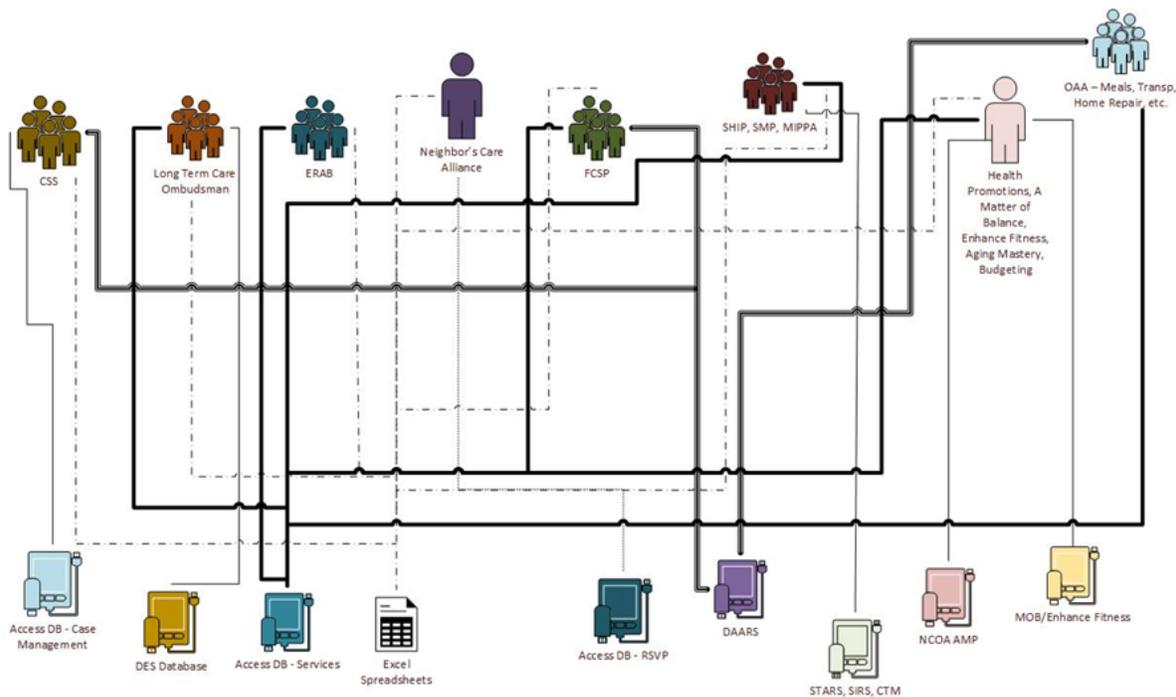
Now that many of PCOA’s programs use the same data management system, PCOA staff can see the complete service delivery process for clients from start to finish. Streamlining processes has not only helped the agency eliminate redundancies but has also reduced paperwork, resulting in more staff time dedicated to providing direct service rather than entering data into multiple systems. Using process mapping has also increased staff capacity to evaluate client needs and make decisions on how best to serve them.

### Program Data Flow Chart

PCOA used this flow chart to illustrate the potential dysfunction, inefficiency and error in data entry among their various programs. The flow chart illustrates how PCOA used several data repositories for different programs and functions (e.g., daily tracking of case status, case assignments, internal reporting, external reporting, and client tracking). This practice led to significant redundancies in data across programs. Having identified these inefficiencies, PCOA consolidated program functions mostly into the statewide DAARS database and largely eliminated use of Microsoft Access databases, Excel spreadsheets and other ancillary systems.

Using flow charts not only helped PCOA standardize and streamline data collection, but it also helped the agency create standard training, operations and procedural materials. Process mapping has also helped the agency improve data integrity by reducing the number of times data is entered into a system, reducing the potential for error. Ultimately, mapping these processes enabled PCOA to reduce costs by increasing efficiency.

**Diagram 2: Program Data Flow Chart**



## Next Steps for PCOA

For PCOA, this realignment is part of a broader goal to use data to help demonstrate the value of its services when approaching potential health care contracting partners. The next phase of this work involves the agency's finance team, aligning billing procedures to staff time. Additionally, PCOA hopes to leverage its relationships with the state's Division of Aging and Adult Services, which would enable it to access data from the state's system to use for internal analysis.

## Advice for CBOs Considering Process Mapping

When considering process mapping, CBO leadership should think about the following: Which parts of the database are staff interacting with in their respective work? What would make tools and assessments more

accessible to staff and eliminate multiple entry points?

Process mapping can provide CBOs with a customizable framework around a particular task, program or service that can provide clarity on what should be done and how to do it. For agencies seeking to use process mapping, it may be helpful to develop staff buy-in by giving the entire team access to process flow charts and for your agency's leadership to clearly communicate which individuals are involved in the process, what their role is and how the agency intends for the process to be carried out. CBOs incorporating process mapping into their work should know that processes may need to change to meet the needs of new partnerships or to ensure efficiency, effectiveness and the quality of the services your CBO provides.

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