

# Flow Charting: Step One in Procedure Development



The first task in developing a procedure is to prepare a flowchart of the current practice. This is done with the active contribution of staff who do the task or know most about the task.

The procedure author/facilitator leads the group and prepares a rough flowchart of the current process. The flowchart emerging in the meeting should be rich in detail through the contributions of all participants, but will also be a mess -- marked up with deletions, changes, and notes added as a result of the group's inputs. Seldom can this be done in one meeting unless the process is simple. All participants should bring any work instructions and check sheets that they use or have concerning the process to the meeting for reference and use in the discussion and to be included in the project file for future reference.

The author and team should consider whether it may be beneficial to cover some of the tasks in multiple separate procedures - there are no hard and fast rules. The best approach is to assure a clear and easy understanding of the process. All that can be said is that a flow chart generally is easier to use if it less complex. Also, if a flow chart focuses on one process or functional area it provides easier future change and control.

*Remember these documents need to be changed as the process is improved and become controlled documents if they remain in the system.*

Following the meeting, the team leader creates a legible flow chart (*with assistance as needed*). Use of a flow charting software program is recommended. The supplemental documents discussed above should be numbered and where used be so indicated on the flow chart.

This created flow chart can be used in the following manner:

1. If the process is correct as drawn and changes in the process are not planned, the chart can become the procedure without creating a word document. It should however be given a number, be dated, have a revision level and show an "approved by" name.
2. If the process is correct as drawn and changes are not planned, a written procedure can be created with the flow chart being an appendix to the created document.
3. The team can use the created chart as a starting point to discuss improvements to the current process with a goal of removing any "non-value added" activities, added check points and improve process flow.
4. Complete a revised flow chart and apply it as shared in steps 1 or 2 above.

Regardless of the approach used to maintain the flow chart so that it reflects the true description of the process that is to be followed by the organization, it should be reviewed on a defined schedule to ensure

that it is current with the practice. The best practice is to change the flow chart every time the process is changed through a formal change control process. Also, always remember that those positions described in the flow chart must receive communication on the changes, instructed to follow the revised process and to discard any non-controlled copies in files.

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