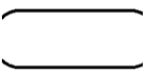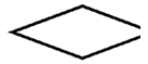# CHARTING THE PROCESS

What is a Process?
A process is a series of actions, changes, or functions bringing about a result.

What is the purpose of developing a process flowchart?
A flowchart is a visual tool used to analyze or represent processes, programs, or systems (i.e., logic models). A process flowchart; however, depicts the step-by-step flow of operations of a particular task like HIV testing. The HIV Testing process flowchart is a visual version of the protocols that help team members identify points where problems might occur and/or intervention points for solution. These flowcharts can also be the first step in the development of policies and procedures.

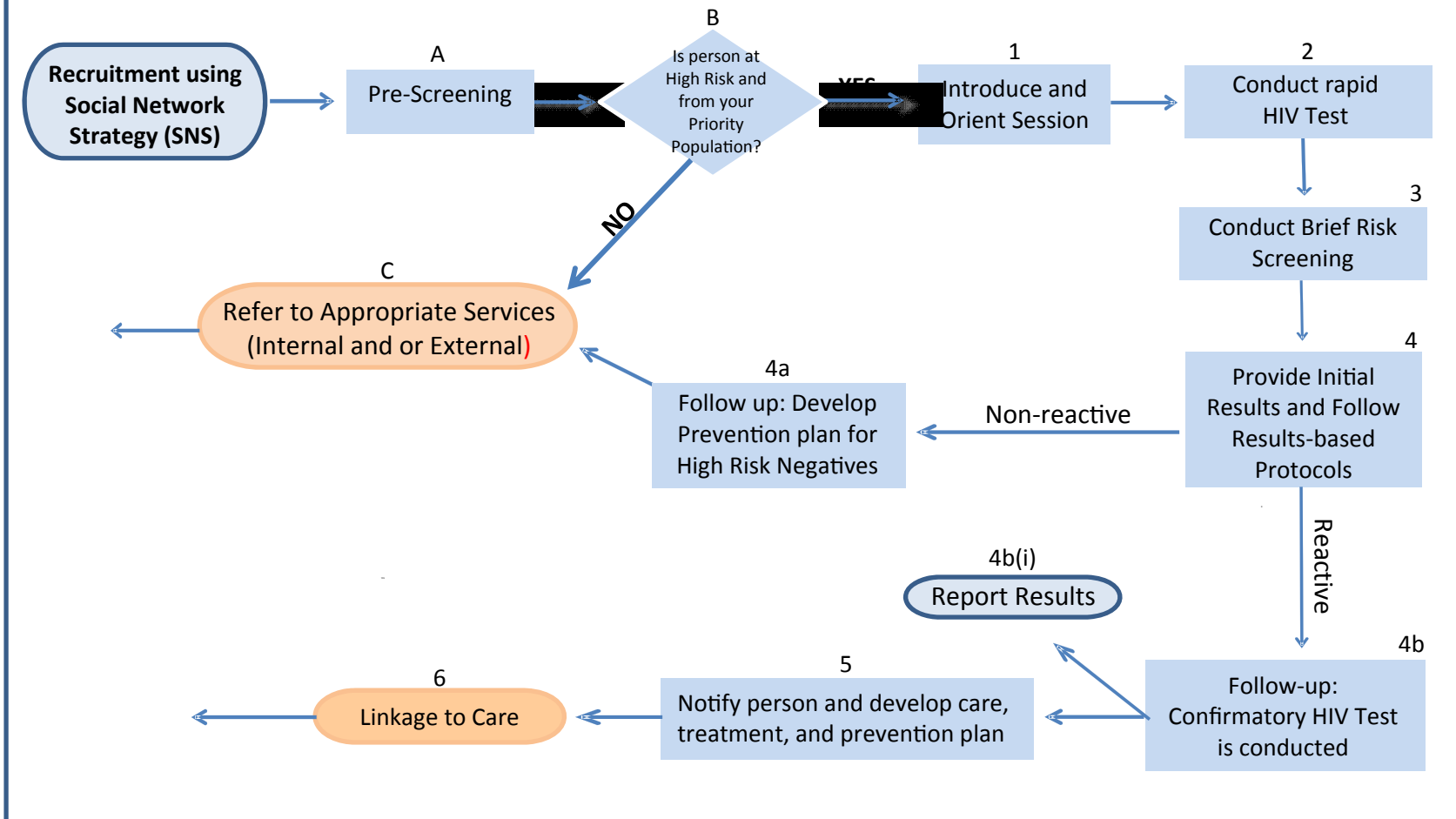**Flowcharting symbols and what they mean**

Symbol	Name	Function
	Start/End	An oval represents a start and end point.
	Arrows	A line is a connector that shows a linear relationship between the representative shapes.
	Process/Step	A rectangle represents a process.
	Decision	A diamond indicates a decision.

Use a Flowchart to:

- Develop and understand the step by step processes of a task.
- Analyze and improve the processes.
- Help others understand the processes when planning a task.

Source: http://www.smartdraw.com/software/flowchart-symbols.htm

Flowchart Basic Procedure
- Basic Materials: Flipchart paper or newsprint, sticky notes or index cards, markers or pens.
- Define the task (reason) for creating the flowchart.
- Identify and define the actions of the task using symbols (e.g. Where and when does the task begin and end?)
- Determine the level of detail to be included in the flowchart.
- Identify the processes/steps needed to complete the task, and write each process/step on a card or sticky note.
- Assign symbols to each process/step (see above).
- Arrange the processes/steps in the order in which they should occur.
- When all processes/steps are in the proper order and everyone agrees, begin to draw arrows to show the flow.
- Review the flowchart with others involved in the development to see if they agree that the process for the defined task has been laid out correctly. Adjust as needed to reach consensus.
- **This is also a good team building exercise!**

Sample Process Flow: HIV Targeted Testing

Recruitment using Social Network Strategy (SNS)

A — Pre-Screening

B — Is person at High Risk and from your Priority Population?

YES → 1 — Introduce and Orient Session

2 — Conduct rapid HIV Test

3 — Conduct Brief Risk Screening

4 — Provide Initial Results and Follow Results-based Protocols

NO → C — Refer to Appropriate Services (Internal and or External)

Non-reactive → 4a — Follow up: Develop Prevention plan for High Risk Negatives → Refer to Appropriate Services (Internal and or External)

Reactive → 4b — Follow-up: Confirmatory HIV Test is conducted

4b(i) — Report Results

5 — Notify person and develop care, treatment, and prevention plan

6 — Linkage to Care

Number	Explanation
A	Person is pre-screened for program eligibility criteria e.g. priority population and HIV risk. (process/step)
B	Determine if person is from priority population you are to reach, is at high risk of HIV, and fits requirements specified in SNS e.g. part of recruiter's social/sexual network, share risk behaviors, etc. (decision).
C	If person does not meet program's eligibility criteria, refer them to appropriate internal and or external services. (end/start)
1	If person meets eligibility criteria, an orientation session is conducted. This is the first step in CDC's guide to implementing non-clinical HIV testing. (process/step)*
2	Conduct rapid HIV Test. (process/step)
3	Brief risk screening is conducted while the test results develop. (process/step)
4	Person is provided initial HIV test results. Follow results-based protocols. (process/step)
	4a Follow up: Provide information on programming specific to Prevention with High Risk Negatives. (process/step)
	4b Follow up: Confirmatory test is done to ensure/validate the accuracy of the preliminary results. Conduct test. (process/step)
	4b(i) Report results to required agencies as identified in your policies and procedures. (end)
5	Inform person and develop care, treatment and prevention plan (process/step)
6	Linkage to care (process) – A series of new steps start here. (end/start)

* Steps from CDC's guide to implementing HIV testing in non-clinical settings.

Note: Each orange symbol could be the beginning of a new process chart.

Things to consider:

- There is no right way to draw your process flowchart. The right way is the way that helps everyone involved understand the process; when it starts, when it ends, as well as the activities and decisions that are/need to be made.
- Everyone that is involved in implementing the task should be involved in flowchart development.
- Once you are done with the method mapped out here, you can then convert it to a more neat final diagram using a computer software that you have available as the example above.
- This is an example of a single task flowchart specific to HIV Testing (Targeted Testing). We encourage you to use this tool and develop your **Linkage to Care Process Flowchart.**