This is a tool to help you think of all the parts of a business process. A guide to what should be included in each box is in brackets. Examples follow that may help provide greater understanding. Not all boxes for each process need to be completed, however they do need to have been considered.

Process (the activity and why you do it)

Input (data to be collected like demographics, case notes, time, etc.)

Tools & Templates used (information used, forms to be completed, assessments used, etc.)

Communication

(alerts, notifications, message, integration)

Who is involved (people who are directly involved with the process)

Outputs (data like reports or documents like letters, emails)

Notes (unique requirements, reasons for decisions)

Rules (business rules that apply to this particular process)

Example 1

Process (the activity and why you do it)

Group treatment set-up - to initiate and follow through on proposed treatment plan and goals outlined at the completion of assessment.

Initial care plan meeting, agree treatment plan, confirm which group the client will be attending

Input (data to be collected like demographics, case notes, time, etc.) » *assessment report with proposed treatment and treatment goals*	**Tools & Templates used** (information used, forms to be completed, assessments used, etc.) » *Safety and care plan templates and guidelines* » *Group list* » *Calendar* » *Therapist Checklist*	**Communication** (alerts, notifications, message, integration) » *treatment plan to treatment and support team* » *reminders of appointments*
Who is involved (people who are directly involved with the process) » *counsellor* » *co-counsellor* » *client* » *whānau* » *social worker*	**Outputs** (data like reports or documents like letters, emails) » *completed safety plan* » *completed care plan* » *appointment schedule for the client*	**Notes (**unique requirements, reasons for decisions)

Rules (business rules that apply to this particular process)

» *Always a co-counsellor and social worker involved*

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Example 2

Process (the activity and why you do it)

Funding and space determined - to identify and confirm funding options and space availability.

Input (data to be collected like demographics, case notes, time, etc.)	**Tools & Templates used** (information used, forms to be completed, assessments used, etc.)	**Communication** (alerts, notifications, message, integration)
» *completed referral form*	» *funders' criteria* » *current client list with ages* » *volunteer list* » *waitlist*	» *client - letter* » *referrer - email* » *funder - email*
Who is involved (people who are directly involved with the process)	**Outputs** (data like reports or documents like letters, emails)	**Notes (**unique requirements, reasons for decisions)
» *Team Leader*	» *acceptance, waitlist, decline* » *letters, emails* » *consent form* » *financial agreement*	

Rules (business rules that apply to this particular process)

- *Funding criteria*
- *always have one space available for urgent cases*
- *only ever accept four five year olds when additional volunteer support available*