

Change Package for Access

Concept	Change Ideas
<p>Measure and Understand Supply and Demand Understanding the patterns of both demand and supply on a weekly, monthly, or seasonal basis allows for focused efforts to shape demand to match supply, and/or increase (or decrease) supply during periods of high (or low) demand.</p>	<ul style="list-style-type: none"> ○ Measure demand for all appointments by practice, individual, and day. ○ Measure supply of appointments for all providers and staff (Clinical FTE). ○ ID number of providers and appointments needed to meet daily demand. ○ Adjust provider/staffing hours to match demand pattern. ○ Make sure to “do today’s work today” after eliminating backlog. ○ Develop plan to continuously measure supply and demand for appointments. ○ Determine current panel. Divide unique patients in the practice by clinical FTE. ○ Determine ideal panel size: Panel size should be equitable based on FTE. ○ Develop a plan for redistributing workload as needed. ○ Develop a plan to monitor panels monthly. Make plans to adjust as needed. ○ Identify a plan for distribution of new pts. ○ Provide continuity.
<p>Recalibrate the System by Working Down the Backlog Backlog consists of appointments on the future schedule that have been put off due to lack of space on the schedule to do this work sooner; working down the backlog recalibrates the system to improve access.</p>	<ul style="list-style-type: none"> ○ Measure backlog. ○ Distinguish between good and bad backlog. ○ Develop a plan to reduce the backlog (add additional appointments). ○ Develop a communication plan. ○ Set begin and end dates. ○ Develop strategies. ○ Plan for staffing support. ○ Develop plans for any additional needs while reducing backlog. ○ Display-wait time data. ○ Protect the providers with short wait times.
<p>Balance Supply and Demand on a Daily, Weekly, and Long-Term Basis The foundation of improved access scheduling is the matching of supply and demand on a daily, weekly, and long-term basis.</p>	<ul style="list-style-type: none"> ○ See “Measure and understand Supply and Demand” above. ○ Create plans to monitor supply and demand on a regular basis. ○ Manage variation in demand. ○ Commit to doing today’s work today. ○ Use regular huddles and staff meetings to plan production and to optimize team communication.
<p>Create Contingency Plans The natural variation in supply and demand that occurs as part of the everyday functioning of a practice often creates problems that contingency plans can address.</p>	<ul style="list-style-type: none"> ○ Review supply / demand patterns, determine the causes of variation. ○ Develop proactive contingency plans to cover demand variances, such as vacations, immunizations seasons, school physicals, hospital admissions, clinic visits that take longer than expected, etc. ○ Develop plan to cover work of providers for expected/unexpected reasons. ○ Set FU appointments toward end of the week, early in the day. ○ Develop time-off policies. ○ Smooth appointment flow. ○ Review bookable hours. ○ Identify a “cut-off time” for end of day (not based on “full”) ○ Develop plans for working with midlevel providers. ○ Develop scripts for common occurrences: Late patients, appointment scheduling, patient without PCP, etc. ○ Use appointment reminders.

<p><u>Manage Panel Size and Scope of the Practice</u> Managing panel/roster size and the scope of the practice allows a team to balance supply and demand and ensures that they can do today's work today.</p>	<ul style="list-style-type: none"> ○ Determine current panel/roster. Divide unique patients in the practice by clinical FTE. ○ Determine ideal panel/roster size based on FTE. ○ Develop a plan for redistributing workload as needed. ○ Develop a plan to monitor panels monthly. Make plans to adjust as needed. ○ Identify a plan for distribution of new pts. ○ Provide continuity.
<p><u>Decrease Demand for Appointments</u> Reducing the amount of demand makes it easier for the system to absorb current or future levels of demand.</p>	<ul style="list-style-type: none"> ○ Continuity (match pt with appropriate provider for each visit). ○ Develop alternatives to face-to-face interactions: group visits; e-mails; telephone and care management. ○ Promote self-management. ○ Extend return appointment intervals. ○ Review future schedules to ascertain if patients could be managed differently. ○ Maximize the efficiency of each visit. ○ Make the visit more effective by utilizing other team members. ○ Develop a plan to reduce no-shows.
<p><u>Optimize the Care Team</u> Optimizing the care team is critical to maximizing the supply of the clinic and improving the daily flow of work.</p>	<ul style="list-style-type: none"> ○ Ensure all team members are functioning to their highest level of certification/licensure to maximize response to patient needs. ○ Remove unnecessary appointment work from providers. Make sure providers have time to do "provider work" that only they can do. ○ Look for appointments that could be managed by non-providers. ○ Use guidelines and protocols for treatment of simple common conditions.
<p><u>Reduce Scheduling Complexity</u> Complex schedules, with many appointment types, times, and restrictions, can actually increase total delay in the system because each appointment type and time creates its own differential delay and queue. Reducing the complexity ultimately decreases system delays.</p>	<ul style="list-style-type: none"> ○ Standardize appointment types and lengths. ○ Use only a small number of types and lengths. ○ ID appointment types with specific needs, such as specific staff or room, or need more time. ○ Create a plan to merge/accommodate for appointments that will take longer. ○ Educate staff on booking to provider, not to first open space on schedule.
<p><u>Predict and Anticipate Patient Needs</u> To ensure that patient needs are met and that patients flow smoothly through the clinic process, staff look ahead on the schedule to identify patient needs for a given day or week.</p>	<ul style="list-style-type: none"> ○ Staff huddles. ○ Plan the visit. ○ Obtain and prepare all information, equipment, and supplies prior to the patient-provider interaction. ○ Create a reminder system for planned care.
<p><u>Improve Work Flow and Remove Waste</u> Improving the flow of work and eliminating waste ensures that the clinical office runs as efficiently and effectively as possible.</p>	<ul style="list-style-type: none"> ○ Find and remove bottlenecks. ○ Remove intermediaries. ○ Use automation and technology. ○ Move steps in the system closer together. ○ Standardize rooms, equipment, patient flow, and information flow. ○ Use just-in-time processing. ○ Do tasks in parallel. ○ Synchronize patient, provider, and information. ○ Use continuous flow to avoid batching.