

BACKLOG REDUCTION WORKSHEET

Date _____ Provider Name: _____

Instructions: Complete this worksheet for each provider in the practice. The steps will help you understand how to reduce your backlog.		
Step 1	Step 2	Step 3
<p>Fill in the number of future appointments for each category between now and the date of the third next available appointment.</p> <p>Good Backlog: _____ (driven by patient or physiology)</p> <p>Bad Backlog: _____ (driven by delay)</p> <p>INITIAL BACKLOG TOTAL: _____</p>	<p>Review future schedule with provider to determine appropriateness of appointments. Some patients may have several appointments in the future, and services can be combined. Some clients might be able to receive a phone call instead of the visit.</p> <p>Enter below the total number of appointments that can be saved by this method.</p> <p>INITIAL BACKLOG REDUCTION: _____</p>	<p>(INITIAL BACKLOG TOTAL) – (INITIAL BACKLOG REDUCTION) = REMAINING BACKLOG</p> <p># of appts to work down backlog = _____.</p>
<p>Description of my Plan to Work Down the Backlog:</p> <p>Name the clinic team members that will support me, and their roles:</p> <p>Backlog reduction start date _____.</p> <p>Backlog reduction end date _____.</p>		
<p>Backlog: Some of the future appointments are appropriate, such as age-specific exams, but much of the future appointments are placed there because of the saturated scheduled today. Backlog can be <i>good</i>, such as when it is client-driven (i.e. a client requests a future appointment), or physiology driven (ie. Well baby check-ups). However, it can also be <i>bad</i>, for instance when work is deflected to the future.</p>		