

# Sample Action Plan

Project Name: Advanced Access

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## Action Plan

### ***What are we trying to accomplish?***

#### **Purpose of project**

- Reduce backlog
- Expand staff skills
- Develop and implement protocols, policies, and procedures for "same day" access

#### **Improvement goal**

- No backlog
- Fewer no-shows and reports of walk-in clinic visits
- Improved patient satisfaction
- Improved clinical team satisfaction
- Improved continuity of care

### ***How will we know that a change is an improvement?***

#### **Current measurement or baseline**

- Number of days or weeks until third next available appointment
- Number of no-shows
- Number of reports of walk-in clinic visits
- Patients can get an appointment with their physician of choice when they want one
- Clinical staff handling non-medical procedures
- Clinical staff level of satisfaction with current scheduling method

#### **What we are going to measure on an ongoing basis**

- Backlog, number of days until third next available appointment
- Number of no-shows
- Patients are able to make an appointment with their physician of choice when they want one
- Clinical staff handling non-medical procedures
- Clinical staff level of satisfaction with advanced access scheduling system

#### **Measurement goal**

- Same-day appointments available
- Patients can see their physician of choice

### ***What action can we test that will result in a small improvement towards our goal?***

#### **Change concepts and ideas to test that will improve on the item you are measuring**

- Add extra appointment slots for reducing backlog only
- Manage/limit amount of time spent in each appointment with a patient
- Increase resources on days when demand is high

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## Action Plan

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Optimize care by redeploying staff to perform non-medical procedures  
Standardize examination rooms and equipment

### **How will we manage the improvement project?**

#### **Ground rules for working through this improvement**

All staff to work Mondays and Fridays  
Extra appointments on weekends, early mornings, and evenings to eliminate backlog, then office hours can be shortened to "normal" if desired  
Minimum staffing levels established and met  
No elective appointments or scheduled recall on Mondays, or on the first day or two after a physician returns from holiday  
Standardize procedures and protocols

#### **Roles and responsibilities**

MOAs to ensure all tests are done prior to patient visits and results are on the chart  
MOAs to do height, weight, BP measurements, diabetic foot exams, any non-medical procedures before physician meets with the patient  
MOAs to guide patients to examination room and have them undress and robe before physician enters the room  
Physicians to stick to appointment length  
Physicians to extend time between follow-up visits to 3 or 4 months, where possible

#### **Realistic schedule**

All staff to agree on goals, approach, and key dates for implementing the plan  
Staff to agree on number of extra appointments per day. Based on that number, the time required to work down the backlog can be established.  
Examination rooms to be equipped with standardized equipment before backlog reduction plan starts.

#### **Key dates**

<b>Plan</b>	Action plan completed	May 15
	Plan in place	May 31
<b>Do</b>	Measure demand for services	June 14
	Determine supply of services	June 31
	Calculate backlog	July 15
	Reduce backlog	August 30
	Streamline appointment types	September 15
	Balance supply and demand	September 30
<b>Study</b>	Assess changes and determine areas for improvement	December 1 to 30
<b>Act</b>	Plan and implement any further changes	January 10