

Advanced Access and Efficiency Checklist

Workbook Reference: [Introduction](#)

Use this checklist as an overview document to log your access and efficiency status as you proceed through the workbook.

Step 1. Develop understanding of what is happening now. Measure the following:	Comments:	Completed:
Supply		
Demand		
Delay (Third Next Available)		
Backlog		
Panel size		
Visit rate		
Step 2. Develop and review processes	Comments:	Completed:
Patient flow process map with office cycle time		
Individual process maps (check-in, rooming, etc)		
Scheduling processes and principles of book early/book late (Refer to Front Desk Strategies)		
Step 3. Balance supply and demand by testing changes	Comments:	Completed:
Develop backlog reduction plan		
Reduce demand		
Reduce variance		

Optimize care team		
Develop contingency plans and time-off policies		
Step 4. Implement changes	Comments:	Completed:
Develop a communication plan		
Develop scripts for common occurrences		
Smooth appointment flow		
Set begin and end dates		
Step 5. Hold the gains	Comments:	Completed:
Continue monitoring		
Third next available appointment		
Provider continuity		
Future open capacity		
Office cycle time		

Adapted from the [Advanced Access and Efficiency Workbook for Primary Care](#) created by Health Quality Ontario (July 2011) and the *Office Practice Redesign in Primary Health Care: Advanced Access and Office Efficiency Workbook* created by British Columbia's General Practice Services Committee Practice Support Program.