Are you in Balance? Comparing Annual Supply to Annual Demand

Workbook Reference: Section 1.2

To obtain schedule balance, your annual **supply of visits** must equal your annual **demand for visits.** This can be estimated by comparing your annual supply of appointments with your anticipated annual demand based on past activity pulled from your EMR data.

Step 1: Complete the equations below to determine if your annual supply equals your annual demand.

Estimated Annual Supply	
(# of weeks worked annually*) _____ x (# of available appointments/week)_____ = *Suggest using 44 full weeks to simplify calculation while accounting for vacation, sick time, stat holidays, etc.	
Anticipated Annual Demand	
Number of appointment visits from previous year, including no shows** = **Can use two years if you wish (i.e. # of visits to the practice in two years / two).	

Step 2: Based on your calculations, identify which scenario below describes your practice.

❒ Scenario A. Supply is greater than or equal to (≥) demand	You are fully ready to embark on achieving an Advanced Access working environment. Continue collecting your TNA appointment measure. If it is constant, it confirms that your supply and demand are in balance. If it is not constant, this may be due to a recent change in demand or supply of appointments (e.g., vacation, flu season, etc.).
❒ Scenario B. Demand is marginally greater than (>) supply	If the margin is modest, you must either increase supply, decrease demand, or do both. Achieving an Advanced Access working environment is within your reach provided you are motivated to change how you work both as a provider and as a team. Refer to Sections 3.2 and 3.3 for strategies to reduce demand and increase supply.
❒ Scenario C. Demand is significantly greater than (>>) supply	If the margin is significant (e.g. demand > 110% of stated supply), looking at ways to decrease demand and increase supply is important, and examining efficiencies in patient flow and non-appointment work will also help. The likelihood of reaching a zero Third Next Available Appointment [TNA] standard is low, but by applying many of the principles and strategies of Advanced Access wait times for patients can be significantly reduced. Use the following equation to calculate the number of appointments per day by which either demand must be reduced or supply increased (or a combination of both) to achieve balance: (demand) _____ – (supply) _____ = _____ (appointments per year)

	(appointments per year) _____ ÷ (# weeks worked annually) _____ = _____ (appointments per week) (appointments per week) _____ ÷ (# days in work week) _____ = _____ (# appointments to make up per day) Your TNA appointment measure will indicate whether or not you have made gains in reducing wait times for routine appointments.

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.