Managing Demand

CP3 Toolkit: Panels

Petaluma Health Center shares three tools that support clinics in assessing and managing demand. The first outlines the process that Petaluma uses to analyze and address weekly demand concerns. The second tool, Managing Short-Demand, tracks scheduled and open appointments by care team and time of day. The third tool is designed around addressing the demand needs of new patients.

Tool 1: Activities to Manage Weekly Demand
- 1-minute daily Huddle TV across sites to give overall access summary for the day and week. Strategies for access for this week and next.
- 1-minute team Huddle to review team availability and planning for absent providers
- 15-minute Provider/MA huddle
- "See your own and don't make them wait" – (i.e., the Mark Murray mantra)
- Call center fills basic schedule, then passes responsibility to lead MA or Nurse on team who can further massage the schedule.

Tool 2: Managing Short-Term Demand

	Morning Schedule		Afternoon Schedule		Evening Schedule	
	am scheduled	*am open*	*pm scheduled*	*pm open*	*eve scheduled*	*eve open*
Team 1	33	1	31	2	0	0
Team 2	23	13	21	26	0	7
Team 3	24	11	41	5	22	2
OB	10	0	20	2	0	0
RP Team1	18	5	32	9	4	12
RP Team 2	12	13	23	16	10	3
	120	43	168	60	36	24

Tool 3: Demand Considerations for New Patients

Addressing demand among new patients
- Use panel data to create spread sheet of open and closed providers.
- Update quarterly
- Panel openings dictate new patient scheduled:
  - >250 – 3 new patients per 4-hour shift
  - >150 – 2 new patients per shift
  - Under 150 – 1 new patient per shift

Considerations
- New patients initially create follow-up visits.
- Temporary decrease in new patients if 3NA > 5 days or provider overwhelmed.
- Even full providers can take occasional new patients when needed
- Family members and newborns are ok on all panels regardless of closed/open status.
- Follow 3NA for new patients – goal < 2 weeks
- Group new patient visits or "new patient only" shifts when demand is high
- Use of Nurse to triage/approve same-day new patients.

These tools are adapted from John Pendleton, Associate Medical Director, Petaluma Health Center, who initially presented these on CCI's February 7, 2017 webinar *Empanelment 2.0: Leveraging Empanelment to Improve Access*. You can view the full series of empanelment webinars here.