**Advanced Access Case Study**

Facilitator Guide

* **Time:** 45 minutes
* **Audience:** ideally more advanced learners (3rd year residents)
* **Objective(s):** to troubleshoot complex access problems in the clinical setting (from the perspective of a clinic manager).
* **Procedures:** Provided you have advanced learners (i.e., understand the term "open-access"), separate people into smaller groups (2-3 people) and divide up the questions, and then bring the group back together to discuss as larger group.

Case Study

Clinic Somewhat Same Day has been working on the Building Blocks for the last 4 years and has a clear vision of where they want to go, developed panel sizes, and implemented teams by establishing teamlets and adding 3 panel managers to the clinic. Last year, they implemented open access holding 4 same day slots on each providers schedule.

The same day slots are available each day and generally fill up 3-5 minutes after the telephones open. Non-same day appointments are 4-6 weeks out depending on the provider and have been that far out since the last cold/flu season ended 3 months ago. Providers and staff like the same day availability but are frustrated that a mix of acute and non-acute visits get into those appointments and that they cannot get acute patients who call later in the morning in for visits without overbooking.

Questions:

1. What is working well about the current access model?
2. What is the biggest access challenge this clinic is facing?
3. What data would you ask this clinic for to better understand what is going on?
4. What hypotheses would you make about what is driving the same day access crunch?
5. What small changes could you test to start improving the same day access issue?

**Advanced Access Case Study**

Evaluation

1) I understand strategies to enhance patient access to their medical home for care.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
| 1 | 2 | 3 | 4 | 5 |

2) This activity enhanced my understanding.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
| 1 | 2 | 3 | 4 | 5 |

3) The information from this activity is relevant to my practice.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Strongly Disagree | Disagree | Undecided | Agree | Strongly Agree |
| 1 | 2 | 3 | 4 | 5 |