**Purpose:** To provide a process for analyzing available appointment data and improving patient access to primary care appointments while ensuring appropriate provider panel sizes are maintained.

**Policy:** Coastal Family Health Center (CFHC) will establish an ongoing review process for the management of provider patient panels and the improvement of patient access to available appointments.

**Procedure:**

1.0 The Quality Department will provide the Executive Team (ET) with a quarterly detailed report to ensure that provider panels are adequate to meet the patient demand.

   1.1 The quarterly report will include a Patient Panel Size Worksheet, using criteria established by the American Academy of Family Physicians (AAFP), the current panel size for each provider, a 1st third next available new patient and established patient report, any terminated provider’s panel size, a provider productivity report, a no-show/cancellation report, and recommendations based on a culmination of all report outcomes.

   1.2 Recommendations for providers with saturated panels will include the following:
      a. Reduction in the number of new patient slots on their schedule.
      b. Redistribution of patients to providers with similar credentials/specialty within the same geographical location. This redistribution will not take place without patient permission.
      c. Redistribution of less complex patients from physicians to midlevel providers. This redistribution will not take place without patient permission.
      d. Increase care team support, additional staffing resources, etc.

   1.3 Recommendations for providers with the potential for panel size augmentation will include the following:
      a. Increase the number of new patient slots on their schedule.
b. Reassign patients from saturated providers’ panels with similar credentials/specialty within the same geographical location to their schedule. This reassignment will not take place without patient permission.

1.4 Recommendations for providers with balanced panels will include the following:
   a. Reduction in the number of new patient slots on their schedule.
   b. No other action should be needed.

1.5 Transitioning panels associated with separating or terminated providers will include reassigning patients to providers’ panels with similar credentials/specialty within the same geographical location to providers with potential panel size augmentation or new onboarding providers. This reassignment will not take place without patient permission.

2.0. The ET will continuously monitor patient demand and availability of appointments by specialty at each clinic location and will adjust provider staffing to meet any increase in demand that is not met by steps taken above.

3.0 After all adjustments are made to provider panel sizes, patients will be scheduled in accordance to the current CHFC PC-PC 14.0 Scheduling Process for Primary Care and accompanying Supplementation Guidelines.

**Guidelines:** N/A  
**Definitions:** N/A  
**Related Links/Forms:**  
2. CHFC PC-PC 14.0 Scheduling Process for Primary Care  
3. Supplementation Guideless for the PC-PC 14.0 Scheduling Process for Primary Care policy  
**References:** N/A  
**Appendix:**