

## Covid-19 Recovery Checklist

### **Schedule/Recovery Planning**

- It's time to review your annual plan and determine how many days you are forecasted to work in 2020. Now determine, as best you can, how many days you are potentially losing in this current crisis. Next create a game plan to make up as many days as possible. You may need to rethink vacation plans and your hours. Many practices are planning to work evenings and Saturdays to compensate for lost time. Remember, many of your patients have reduced work hours also and may be reluctant to take time off for appointments in the future.
- It is important for your schedulers to know your daily production goals and strive to schedule to those goals. You don't want to find yourself very "busy" but not productive once normal operations resume. If you do not know your goals, reach out to your consultant.
- Speak to your attorney about a patient/employee waiver for emergency treatment. There are several samples online that are print ready.
- If digital x-rays have already been obtained, you may want to consider doing virtual consultations with your patients.
- Specialists should communicate back to the GP with an update after every emergency patient seen.**
- Increase revenue rapidly with adult fluoride, whitening, toothbrush sales.
- Look at adding flexible payment options. Look into short term payment plans to increase case acceptance. Covering cost initially will help you pay bills and keep your team employed until bigger cases come along.
- Run reports on all patients not seen for 18-36 months and set them to inactive. You don't need to archive patients, because they will not show up on all software. You can

simply set them as inactive. This keeps the active patient list more accurate. Make a plan to attempt to re-activate any patient that hasn't been seen in the previous 6-36 months. Start with the most recent patients first!

## Patient Communication

- Be sure your phone is answered by a team member during your regular business hours. It is important that you are making every effort to continue to build relationships with your patients and be available to answer questions and reschedule appointments.
- Be sure you have temporarily turned off all automatic appointment confirmations. During closures and right after reopening, it is best to call all patients to provide the personal touch and reassurance.
- Try not to use the word closed or canceled in written or verbal communication! This is a trigger word that that evokes a negative emotional response. Instead use the phrase "modified schedule".
- Consider voicemail and social media messaging such as:

***"As you know, your care and safety and the safety of our team is our top priority. We currently have modified our schedule to accommodate emergency patients only. If you have any questions regarding your dental care or have urgent concerns, please give us a call. We are here for you and will make sure that your needs are taken care of. Thank you for being our patient!"***

- Communicate with patients 1-on-1. Call several patients per day. Anyone in current treatment, anyone over 65, kids. Choose and make a list.
- Re-purpose your appointment confirmation communication system to send regular updates about the office and how you will be handling future and rescheduled appointments. Send an update asking patients to follow you on social media.
- Get a special emergency notice banner for your website to announce hours and Covid-19 updates. Include an emergency phone number.

## Social Media Communication

- Consider using Facebook Live to send reassuring messages to your patients.
- Social distancing means more social media! Every practice should post several times (at least 3 times) per week. Just because your office is closed to regular patients doesn't mean that you shouldn't keep in touch with patients!
- Pedo:** read a book for virtual story time, post links to virtual experiences, dance party, puzzles/word games, host a dance party.!
- Ortho:** read a book, post links to virtual experiences, dance party, puzzles/word games.
- Post information about what a real ortho emergency is and how to handle it.
- Endo/Perio/OMS:** Post emergency hours, emergency safety protocols (what patients can expect)
- Review any planned Facebook or Google ads and hold if necessary.

## Decrease Expenses

- Consider options for your team including layoff, furlough or decreasing hours. You may need different decisions for hourly vs. salaried employees.
- Prepare to apply for the SBA 7(a) loans that are included in the recently ratified government coronavirus relief package. These loans will help many dental practices cover certain payroll, rent and utility expenses for up to 8 weeks. Details have not been released yet, but if this applies to you, be sure to alert your CPA and have ready:
  - i. 2 years tax filings
  - ii. Last full year practice P&L
  - iii. Current P&L
  - iv. State payroll records
  - v. Practice operating agreement

- Hold auto payments to vendors immediately.
- Hold all ACH withdrawals from your bank accounts immediately. You will have to contact your bank to see how you can go about doing this as quickly as possible.
- If you have a practice or equipment loan or lease, contact your lender immediately and ask for a deferment or extension of time to pay your bill.
- Contact your landlord to see if you can lower your lease payment or defer payment until you return to work.
- Contact your credit card companies. Some may waive fees and interest if you make minimum payments, others may give you a few months to pay off your balance, or they may have other terms with specific rules that you must follow to achieve.
- Contact your supply companies and ask them to give you an extension to pay any balances.
- Pause any non-essential services that your practice uses; laundry, cable tv, magazines, water delivery, etc.
- If you have a home equity line of credit (HELOC), tap into it and put the money into your personal account ASAP. You may not be able to access it later and you can potentially use it as a personal loan to your business if necessary.
- If your office is closed, consider forwarding the mail to your home, have them hold it at the post office, or have it delivered to a PO box. Check the mail daily and deposit any checks that come in.
- Turn off all unnecessary equipment in your office. Follow manufacturer's recommendations for dental equipment like 3D printers, suction units, etc.
- Change automatic thermostats to use as little heat/cooling as necessary.

- Assess critical bills to be paid and set a schedule for payment.
- Look into rent/mortgage relief and forgiveness if you own your own building.

## Insurance

- Gather list of outstanding claims over 30 days:
  1. Have a team member call on claims that have not been paid.
  2. Be certain all denied claims included a very clear narrative, X-Ray, Perio Charting & intra-oral photos
- Employer insurance plans:
  1. Make sure you do not have duplicate plans. Sort plans by group number.
  2. If you have multiples of the exact same employer with the same group number and benefits, put an asterisk (\*) by the one with the detailed note and merge others into this plan.
- Top 100 employers - verification of insurance:
  1. Add detailed notes in the insurance section of your software (do not add this information to the individual patient)
  2. If added correctly, the note will be attached to the plan and each member on this plan will have the note attached automatically when the insurance plan is loaded.
  3. You should typically only need to get breakdowns 1 time per year per group number and then simply verify eligibility for the individual patients as they come into your practice. If they are on a plan you have already verified, simply attach and you are done.
  4. Be certain it is the exact same plan and benefits.
- Terminated contracts with any insurance:
  1. Print a list of patients by the insurance company for the company you are out of network with now.
  2. Remove the insurance fee schedules from those plans to allow for accurate treatment plans and reduce the risk of an upset patient or dentist feeling pressured to take unnecessary write-offs.

- Running Reports
  1. Run a report on all patients not seen for more than 3 years and set them to inactive.
  2. It isn't necessary to Archive patients, because they will not show up on all software. Simply inactivate these patients to keep the active patient list more accurate.
  
- Recare system for your software:
  1. Have a team member master the recall process
  2. Most practices have more than 35% of their patients without future Hygiene appointments.
  3. It is critical to utilize your software to its fullest capabilities.
  4. Third-party systems can help with this but are only as good as the information it can access.