



Making the Most out of a Temporary Closure

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**Taking care of things around your
practice you may not always
have the time for**

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Your office has unexpectedly had to close for a period of time...Now what?



Hey there! I am Denise Ciardello with Global Team Solutions. If you aren't familiar with GTS, we work with doctors, practice owners, and their teams to create tools needed to maintain an organized, business focused, yet FUN environment.

We know that owning and running a practice isn't always easy and we also know that an unexpected closure can leave you in uncertain times and unfamiliar territory. But, an unexpected closure doesn't mean there isn't anything for you or your team to do; it just means that you have more time to complete the tasks you maybe don't have time for on a regular basis because you are busy taking care of your patients.



Let's get started!

The world is so topsy turvy right now. How many times have you heard the term CoronaVirus in the past 24 hours? Probably thousands! Then, all the changes in what we are supposed to do or not do make everything incredibly confusing. Social media doesn't make it any better either.

Here's a shocker, there is some incorrect information out there. I think my first piece of advice is to take everything you read with a grain of salt or just get away from social media all together.

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Do you remember the game Trouble? It is the one where you push the cup and the dice pops up and your turn depends on how the dice lands. Lately, I feel like my life is in the cup from that game. By the way, did you know that the dice popper is called a Popomatic?

Every day I feel like the cup is popped, the news is different, the requirements are different resulting in not knowing where to turn.

One day we cannot congregate in groups larger than 250 people, then it went to 100 people, quickly moving to 50 and now no more than 10. It is enough to drive us all crazy with nowhere to turn for help. The truth of the matter is that we have no control over what is decided at the federal level, state level, and even the local level. We are not in control of what happens outside our doors.



We are all sitting around, filled with anxiety, wringing our hands in concern and worrying. All of these things only make us more apprehensive and more fearful.

**"Worry is negatively fantasizing about an outcome"
- Katherine Eitel Belt**

**Let's sweep out the cobwebs and
do something constructive!
Let's focus on what we **DO** have control over.**

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We do have control over our little corner of the world that belongs to each of us. We can change, organize and shape, until the powers that be decide what is what. How about we focus our attention on solving those issues that have been bugging us for a while and get super organized.

The goal of the ebook is to bring some task ideas to you that can be completed during slow times that, maybe, you haven't thought of yet.

We will look at three different ways you and your staff can continue to be productive during this unexpected time.

- 1. Tasks for Working In the Office**
- 2. Tasks for Working Remotely**
- 3. Tasks for Doctors, Practice Owners, and Office Managers**

1 Tasks for working in the office

1. Sanitize Everything

Let's start here. This would be a great team event. If you are thinking that you keep an extremely clean office, think again. Take a good look around your office. Sterilize every inch of every room, and every item within every room.

This includes:

- The front and back of all doors
- Door knobs
- Wires
- Pens
- Phones
- Pictures and wall-hangings
- Signature devices
- Computers
- Light fixtures
- Anything & Everything!



If the whole team is involved, assign each person to a room, an operator, a bathroom, and the reception room.

2. Review Supply Inventory

Consider what products you are using in the operatory. Are there some that may be easier, quicker, safer, or better in use? A cost analysis with the option of changing can be considered. Do you have any supplies that are about to expire? Put those next in line to use to avoid waste. Look at your office supplies. Do you need paper, coffee, or promo products?

3. Clean out the Storage Area

When was the last time your storage room was cleaned and organized? What can be disposed of or donated? When your entire office is straightened and organized, you will be more productive as an individual and as a team. It is funny because I can go into an office and see an empty cardboard box in a breakroom and when I go back the next month, the same box is still there. Once something that is out of place is ignored for a day, it has officially found a new home.

**Wouldn't it feel great to have your storage area looking more organized?
Let's get rid of those items that don't need to be taking up space in your office.**



By the way, is this where you put all those old instruments that you do not use anymore? Did you know that HuFriedy has a great recycling program for instruments that are broken or unusable? It's right on their website!

4. Update your Brochures

How about those brochures that are stashed and stored all over the office. They are most likely hanging out in the reception area, the operatories, even in the holders hanging on the wall down the hall. Are they up-to-date? Still relevant? Are they bent or torn? Should you order more?

5. Prepare your Emergency Kit



Do you know where your emergency kit is? Are all of the supplies within it organized? Is anything expired? Do you need to make your team aware of anything inside the kit? Have you thought about creating an emergency plan in the event of a disaster, terrorist attack, or anything considered an emergency.

6. Calibrate your X-ray Machine

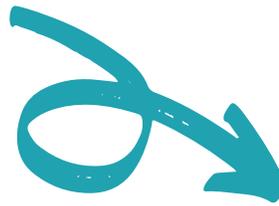
Is your X-ray machine kept up-to-date? When was the last time it was calibrated? Review the x-ray binder. Is it accurate and up-to-date?

7. Locate & Update MSDS Binder

Do you know where your MSDS book is right this second? Whether you keep this information in a binder or digitally, it needs to be updated all the time.

8. Organize Operation Manuals

You have an office full of all types of equipment. You have computers, printers, a sterilizer, ultrasonic, cameras and much more. There are so many and each one of these have an operation manual. Look through these and see if they are still in your office or if they have been replaced.



Document the serial numbers in the event troubleshooting is ever needed. Some of these can be in your MSDS book but it is also good for reviewing to ensure you are using and maintaining your equipment properly. Let's also update all our vendor information and store it where everyone has access.

9. Training on Everything

A big area of improvement for the entire team includes Training. This could be on your practice management software, OSHA/HIPAA, Weave, X-ray system, Ceraz or E4D, Itero or Image Scanners, & Medical Billing.

2 Tasks for working remotely

Another option during this time of closure is to have workers do some of the work from home. If it is decided that there will be employees working from home, there should be clearly written Scope of Services.

Let's begin with the Guidelines

Determine what tasks CAN be done remotely

Create checklists for these tasks

Come up with time frames and exact methods for completion & maintain communication

GOALS

These should be clear and measurable. You can also include your expectations of those working remotely. There should be a method of tracking time worked and if any of the work is money related, a checks and balance system should be implemented.

Effective remote employment requires the development of a good system of communication through texting, phone calls, or using an app like Slack. It is also recommended to have weekly Zoom meetings to keep everyone feeling connected.

The tasks we are going to cover here are tasks that can be done in the office but also remotely. For this, a secure remote log-in will be required. Check with your IT tech for this.

1. Update Fee Schedules

Right now is the perfect time to get updated fee schedules from insurance companies. This typically requires a phone call to each insurance company in which your office is a participating provider.



2. Tracking Outstanding Insurance Claims/Sending Statements

Following up on outstanding insurance claims is always a good thing to do. It will bring in much needed revenue during this time. Also, sending outstanding patient statements during this time is a good task for someone to complete remotely.

3. Organize/Clean-up Practice Management Software

Take a look at your practice management software. Are there things you could clean up?

- Delete duplicate insurance plans
- Inactivate patients who haven't been in the office in a few years. This is also a great time to launch a reactivation campaign to get those patients back in.
- Make sure all active patients are attached to your recall system.
- Clean-up treatment plans, prioritize them and archive



3 Tasks for Doctor, Owner, & Office Manager

You spend so much time every day focusing on patient care that there are things you want to do but just don't have time to do. This is the perfect time to look into updating, organizing, and implementing some of the following.

1. Review your Payment Types

Most offices accept cash, check, and credit cards. Have you thought about other options like Apple Pay, Venmo, Zelle, or other cash apps? These might allow you to reduce some of those fees that you pay,



2. Review your Accounting System

Are you utilizing your Quickbooks to the best of your ability? Maybe a quick call to Susan Gunn for a refresher would be in order.

3. Review Patient Communication System

When are your messages going out? What do your messages say?

4. Review PPO Plans

Take a look at the PPO plans you are currently under contract with. Are there any that you might consider discontinuing your contract?



5. Update Marketing Plan

Take a look at your marketing plan. Is it stale, even non-existent? Think outside the box. Get some new and fresh ideas for patient acquisition. Consider your social media strategy, implementing a referral program or even a membership plan.

6. Launch in-office Membership plan

Launching an in-office membership plan is an excellent way to give options to your patients that may not have insurance or the insurance they do have is subpar for their needs.

7. Create a Protocol Book

Creating a Protocol Book is the biggest and best thing you could do for your office. If you already have one, review it for accuracy. If you don't have one, allow your team to help you create one. This is the complete and total operations book for your practice. I preach on having one of these for every doctor I know.



Each task in your office should have step-by-step instructions on exactly how it is done. This will be a life saver for you when the office manager you have had for 23 years leave and you hire someone new or if an assistant goes on maternity leave and a temporary is brought in.

"SuperSize your compassion for all the other people on this planet. We've all gone through this together. Appreciate this for what it is - a worldly event."

-Mark LeBlanc

WOW! How was that for an extensive list of tasks that can be completed during this time? These are all the things I hear people say they just don't have time to do. Guess what? Now you do!

The one thing that I do know is that faith and fear cannot live in the same heart. Have faith that although we do not know when, we are all certain that there will be an end to this chaos.

~believe~



Getting yourself and your team prepared for what is going to happen on the other side is a positive step in utilizing this temporary closure. The best thing you can do is stay busy and stay upbeat. You have not been fired, just merely sidelined for a bit. Think of ways to make your practice fresh and new; don't be afraid to try something different. The world will not be the same after this and you shouldn't be either.

If you would like more information on how Global Team Solutions can help your practice grow, please visit our website at www.gtsgurus.com or email us at info@gtsgurus.com