



MGE Client Practice Action & Control Checklist

For Practices That Are Temporarily Not Seeing Patients

NOTE: This checklist is being provided as suggestions and ideas from which to improve your office. This is not to be taken as a guarantee that the information provided is appropriate to your practice. Each practice is individually responsible for ensuring that any system implemented complies with the applicable federal, state and local accounting, tax and employment laws, rules and regulations governing the place in which your practice is located. These suggestions do NOT constitute legal or accounting advice. You should seek advice from your own accounting and legal advisors as to what is appropriate to implement in your practice, prior to implementation. MGE: Management Experts, Inc. is not responsible for any claims, real or otherwise, associated with this document or any part thereof.

Dear MGE Client,

This **Practice Action & Control Checklist** is a series of actions designed to help you maintain your practice through this uniquely challenging time. It's specifically designed for practices that are in an area which has mandated or suggested a temporary closing or if the doctor has chosen to temporarily suspend seeing patients. Doing these steps positions you to not only be busy when you return to normal patient hours, but for expansion when life starts to return "back to normal."

And remember **things will return to normal**. Also keep in mind that the condition you will find yourself in at that time is determined by the *actions you take today*. So even though you may not be seeing patients right now, this is not the time to "relax."

Please read through it and implement as soon as possible. If you need any assistance, contact us here at MGE at **(800) 640-1140**.

Best,
The MGE Team.

START OF CHECKLIST

1. **If you are treating a patient, treat the patient in front of you.** Most of you will be seeing emergency patients during this time. When you are seeing a patient give them all of your attention and treat them as you normally would.
2. **Don't withdraw.** If you've been to the MGE Communication & Sales Seminar A, you'll remember that the definition of "**Suppress**" is:

“To squash; to sit on, to make smaller, to refuse to let reach, to make uncertain about his reaching...” L. Ron Hubbard.

If anything, I think that we would all agree that the current situation is a fairly “suppressing” experience. And as you see above, suppression affects “reach.” In this instance, the way to stay *causative* and the correct reaction is **to reach. Not to withdraw.** So, you want to keep marketing, reactivating patients, etc. Schedule people for when you plan to re-open for patients. Your competition is withdrawing so you need to reach out more and take that space your competition is withdrawing from.

3. **Move fast.** People tend to move slow during times of suppression, so you need to start moving **fast.**
4. **Stay informed – but be smart.** If you’re going to keep yourself informed about what’s going on, which you should, there’s two different ways to do that: you can go to a sensationalized news source or you can go to sources that provide actual, usable data. For example, state, federal and local government websites. When it’s Hurricane Season in Florida, we use the National Hurricane Center. It gives us **facts** without all the extra garbage added by the mainstream media.

If you have an Executive Order in place in your state that limits the type of patients that you treat or see, or procedures that you are allowed to do, **read it, understand it, and follow it.** If you feel that it is ambiguous, if you have any confusions about it, or have questions about what to do with patients that are in the middle of treatment etc., reach out to your malpractice carrier, your State Dental Association, or your state dental board. You may also remember Dr. Frank Recker who has lectured at the MGE Owner’s Conference several times. He’s a dentist *and an* attorney and has been a friend to MGE for many years and has worked with a number of MGE clients. We spoke with Dr. Recker in light of what’s currently going on and he graciously offered to help with any questions along these lines. You can email Dr. Recker at Recker@DDSLaw.com.

And also, there are plenty of “predictions” being made about “what’s going to happen.” Many of these predictions conflict with one another or are quotes taken out of context. The truth is, if someone could *accurately* predict the future, they would be a gazillionaire – the richest person in the history of the world! So, people can “predict” all they want, but we’ve yet to meet someone who can predict the future with 100% accuracy. So, don’t put too much stock in predictions because there’s no guarantee they’re going to happen. Stick to facts

and handle accordingly. That said, being properly prepared is smart. Using your own judgement and the facts to hand, look at the weeks to come and prepare yourself, your family and your team accordingly to ensure you navigate through this new challenge in as painless a manner as possible.

5. **With regards to your staff.** There is a lot of work that needs to be done, whether you are seeing patients or not. Especially with regards to outflow, patient scheduling, reactivation etc. You and any staff member you think has the necessary communication skills should be in the office working right now in order to be properly set up when you start seeing patients again.

If you are in a situation where you **can't have staff come to the office right now**, or where certain staff can't work, do your best to ensure they have a plan on how they are going to get through the next little bit, financially and otherwise. Know where they can get assistance if necessary. They are your staff and have been there for you. Please be there for them now.

And no matter what - even if you and your team are stuck at home - **please do make sure that your phone is being answered.**

6. **Inform staff that this should not be "the" topic of discussion.** If you're in your office, create a coronavirus-free zone! And by this, we don't just mean the pathogen. We mean that it should not be a regular topic of discussion in the office. We aren't discounting the importance of the situation but when you are at work, that's what you should be doing. Both your team and any patients you might see have been hearing enough about it at every turn, let your office be a place where people can focus on the task at hand and not worry.
7. **Maintain a Healthy Environment.** Have a plan with regards to staff protocol when they are sick. Publish the plan to all staff. The CDC has good guidelines to use for this. The ADA also published a series of dental specific guidelines. If you have any questions about how to enforce policies of this kind in your office, we recommend seeking the appropriate professional/legal advice.

In response to this, some of our clients have reported that they are now seeing only one patient per hour with a 15-minute window in between to sterilize the whole office. In any event, follow the posted advice and recommendations from the CDC and ADA. And of course, keep to the letter of the law with your state dental board and any directives/laws and Executive Orders published by your state or local governments.

8. **Stay in Communication with Your Patient Base:** Even if your office is **not** open except for emergency treatment, **STAY IN COMMUNICATION WITH YOUR PATIENTS.** We cannot stress this enough. This can be via email, mail, phone, text, etc. While we mention “Outflowing” in several points of this checklist – this regular communication with patients is **KEY.** Let them know you are available for emergencies and so on. Make sure they know you haven’t just disappeared. You could let them know what’s happening in the office, why you’re not there and what you’re doing with appointments that have to be pushed into the future. Some type of communication should be sent on a regular basis to your patient base until you resume normal operations. Of course, you would also regularly communicate with your patients after things return to normal. But it’s just as if not more critical to do so now.
9. **Again, remember there will be an end to this.** So, when life starts again, whether that’s in 30 days, 60 days or 90 days, you don’t want to find yourself at a point of starting from square zero.
10. **Outflow.** Even if you and your team are homebound, work with them to contact all patients that are scheduled for the next few weeks and reschedule them for when you will resume normal operations. Chances are you may already have a full schedule at that time, especially for hygiene. Don’t schedule patients in the “next available opening” as you will create a situation where some patients are going to be scheduled out too far. Instead, open another hygiene column to deal with the extra traffic. When you return you can run assisted hygiene or get a temporary hygienist.

As soon as you have completed this, get onto calling patients that are overdue for hygiene and get them scheduled for when you resume regular patient hours. You have A LOT of patients that are currently not scheduled. Take advantage of the time you have now to finally get your recall and reactivation handled. This is the time to finally open up those extra days of hygiene.

11. **Do not leave a patient unscheduled.** When cancelling appointments – ensure the patient is rescheduled for some point in the future. In some cases, states have a specific date they will resume normal operations, some others don’t. If you don’t have a specific date, you could always estimate a date in the future and have the patient schedule for then. Worst case scenario, if operations are not back to normal by that time, you can reschedule the patient again. Conversely if

they return to normal sooner, you can move these people up. The point: No patient goes unscheduled.

12. **Increase your marketing budget.** If you don't know what or how to do this, or what marketing you should start/increase, set up a free consult with our Dental Marketing Expert, Dan Brown. He will evaluate your location, current marketing and budget, and will help you decide which one is best for you right now. Again, **DO NOT CUT YOUR MARKETING BUDGET.** Dan can also help you evaluate if you need to change your marketing to better suit the situation you are in at the moment.
13. **Put extra special focus on getting in more New Patients. Including on free or low-cost actions.** You're going to be making a lot of phone calls, so put a killer new patient special in place and schedule family members of existing patients for when you return. Take this opportunity to ask your patients if they have anyone else at home that currently is not seeing a dentist. Ask the patient to set up an appointment for them as well for when you resume normal patient hours. And ensure that all of the patients you call are aware of what you can do (for example, you might be available for emergency care and so on).
14. **Increase your staff training.** Most offices have woefully inadequate staff training time. This is the time to set a little bit of time aside each day to work with your staff on our online training platform, **DDS Success**. DDS Success has sample videos on how to do all these things, so have them watch the video and drill, drill, drill. If needed, you could have your team install the application Zoom and drill and discuss these things on webcam.
15. **Keep Patients Moving on their Treatment Plans.** Print a copy of your incomplete treatment plan list and get those patients scheduled for either their recall appointment (if they are overdue) or a consultation with the doctor when normal patient hours resume. This is your future production. Let them know you are not seeing patients right now except on an emergency basis, but the doctor was going through their chart and saw that they have ____ (active infections, cracked teeth, whatever is appropriate). The doctor does want to keep an eye on this until they decide to proceed with the treatment and therefore asked you to reach out to them to schedule a complimentary consultation. Then get that patient scheduled for when you are open for patients again.
16. **Renegotiate Your Fees:** If outflow and staff training are rolling, and you have the time, renegotiate with your PPOs. This is usually a time-consuming process but

very well worth it. Pick the most common procedures you do and call the insurance company to renegotiate those to within 10% of your private fee. If you are unsure of how to do this, need help or wish for a referral to a company who does this professionally and is reasonably priced, please give your Power Program Manager a call and we will be happy to assist you.

17. **Cut the fat out of your overhead.** The only thing you want to spend money on right now is what's vital to patient care, your basic overhead (rent, utilities, debt service, etc.), staff training, marketing and outflow. Cut out any unnecessary expense. We can help you with this as needed.
18. **Contact your local hospitals, nursing homes, assisted living facilities etc.** If you are still seeing emergency patients, contact your local hospitals, nursing homes, assisted living facilities, etc. Most hospitals are not seeing emergency dental patients right now. Get yourself put on the list that you will be receiving those patients for treatment. We have had reports from clients that people living in those facilities have no access to emergency care right now and that this is creating problems.
19. **Stay informed of relief packages that are being offered for small businesses.** There is legislature being passed that will help you and your staff. For example, with everything going on, the SBA is now offering a low interest express emergency relief loan. If you are at all concerned you can go to SBA.gov and turn in an application online. That gives you a "back-up plan" if it makes you more comfortable to have that in place. You don't have to take the money if you don't want to and it's nice to have in place. You never want to apply for a loan when you need one - you want to already have it in place by then.
20. **Use your time productively.** Take this time to do the things you've been meaning to do. Write manuals, train staff, any implementation of the Power Program you've been meaning to do, get through your courses when they go online, get through the DDS Success videos, get your recall lists, reactivation lists and patient addresses correct in the computer, get your OSHA regulation reviewed and make sure they are fully followed, clean up that incomplete treatment list etc. etc. etc. Remember: this will pass, and you will be in so much better shape if you do these things now.
21. **Take this time to look ahead.** Really examine your future and what you want it to look like. Work out a plan on what you are going to do to get there when you reopen. We are always happy to help you with this.

22. **And most importantly.** Stay well, be kind, enjoy your family. Play games together, go for walks etc. and take advantage of the time you have been given to spend time with the people you love most.

END OF CHECKLIST - Please contact your MGE consultant to run through these steps if you have any question or concerns regarding execution.