

Getting Started Checklist

Once you get back to the office you may feel overwhelmed with where to even start. Below is a checklist for the initial weeks back from the service ban that will have a big impact.

To support your office to make a full recovery, we have also provided call scrips, messaging recommendations, and other resources supporting the checklist recommendations which can be downloaded at www.RecallMax.com/COVID-19resources.

Phase 1: Prepare to Open

- ☑ **You've Planned a Re-Open Date – Announce You're Back!** Communicate with your patients that the ban has been lifted and you're happy to be able to see everyone again.
 - Include details of any changes your practice has made to enhance the safety of your patients.
 - This can be done with the RecallMax Announcement feature (mass email).
 - Post your announcement on your website or any social media forums your practice also uses.
 - (See [COVID-19 Recovery Resources – Re-opening Announcement for sample.](#))

- ☑ **Scripts – Prepare Your Admin Team For Engaging Patients:** Ensure that you have scripts/ talking points prepared for the admin team. You will have instructions and guidelines from your college that need to be communicated to patients prior to an appointment.
 - **Patient Safety Measures:** Patients may have questions about what measures are being taken to ensure their safety.
 - Ensure all admins are aware and can communicate what the practice has in place to ensure a low risk/exposure visit.
 - **Health Screening Questions When Confirming Appointments:** In addition to ensuring patients are aware of their appointments, you will need to ask health screening questions.
 - Any COVID symptoms – fever, cough, shortness of breath, flu like symptoms?
 - Have patients been in contact with anyone who has symptoms or tested positive?

- **Virtual Waiting Room/Other Reception Procedures:** What is the protocol or process for patients when they arrive for appointments?
 - To initiate Virtual Waiting Room procedures, go to “Today’s Patients” feature on the RecallMax toolbar and modify day of reminder messages to patients i.e.: “To ensure social distancing is observed, please remain in your vehicle and text us upon arrival and we will text you back when you should enter the building.”
 - If you’ve made other changes to your reception procedures, make sure patients are informed prior to arriving.
- **Sensitivity In A New Economic Climate:** As you reach out to currently booked patients, rebooking those who missed appointments due to closure, or anyone who has unscheduled treatment, you will want to bear in mind that they may no longer have dental insurance or may have faced a job loss.
 - Your practice may want to consider offering no interest monthly payment terms for both hygiene and restorative care to assist patients.
 - Be sure to empathize with patients in these situations and offer extra homecare recommendations for patients that are not able to return.

(See COVID-19 Recovery Resources – Call Scripts and Patient Visit Guide for samples.)

- ☑ **Auto Messages Off?** Be sure to contact support to turn your auto messaging back on once you have made any necessary adjustments to your hygiene schedules to accommodate health guidelines. This will ensure that anyone who is booked in the future is reminded they have an appointment and will also get reminders out to patients who are overdue.
 - If you made changes to your messages regarding the COVID-19 service ban, you will need to modify your messages now that you have reopened and include appointment instructions i.e.: virtual waiting room instructions.
 - Go to settings ➔ messages ➔ modifications on your RecallMax™ toolbar to modify your messages.
 - Contact support for assistance with any of these procedures.

(See COVID-19 Recovery Resources – Auto Messaging Recommendations for samples.)

*** DO NOT RELY ON AUTO MESSAGING AS YOUR ONLY METHOD OF RECOVERY. Ensure you are using RecallMax™ features to connect with patients who have not responded to auto messages, or have not received auto messages and connect with a phone call.**

- ☑ **Update** your practice voicemail message and email auto reply message.

Phase 2: Rebuild Your Schedule

Follow the scheduling priorities outlined below to maximize the re-scheduling of your patients and your recovery (see [COVID-19 Recovery Resources – Rebuilding Your Schedule](#) for detailed information).

- 1 Confirm existing appointments in your schedule as the first order of business after re – opening.** This will ensure that anyone who is booked in the future is reminded they have an appointment and does not fall behind in their hygiene and recall schedule.
- 2 Missed & Cancelled:** Contact and re-schedule patients that missed appointments due to COVID-19 bans. These patients are your best bet to getting to book as they are more likely to book than someone who wasn't booked in the first place.
 - You can find all these patients under your toolbar → patient lists → Missed and cancelled.
 - We have extended the list beyond our default 60 days to 180 days to ensure that no opportunities are missed. Patients can be sorted chronically to when bans started.
- 3 Use Short Notice Lists to Catch Up On Backlogs:** Once bans are lifted, you may find yourself in a position where you have trouble finding openings for patients that have missed hygiene and recall appointments due to upcoming pre-appointed patients filling your schedule.
 - Capture and catch up on backlogs of patients needing appointments by assigning them to RecallMax™ short notice lists that have been enhanced to notify missed COVID-19 appointment patients.
- 4 Hygiene & Recall:** Review your hygiene bookings for the next 4 weeks to get a sense as to how many openings you are needing to fill in short order.
 - Check your patients on short notice lists for hygiene and send a blast to everyone
 - Your recall scheduling opportunities are all pre-organized and ready for you on patient lists → starting at due & unscheduled down to 24 months overdue. The list is designed to get you the best booking results when you work them from the top down. Yes, auto messages are going to the patients with cell and email, however most patients book from personal contact not auto messages so it's best if you connect with them on a personal level.

- 5 **Unscheduled Treatment:** Once you have caught up on your missed appointments and your hygiene chairs start to fill, focus on filling your restorative chairs as a priority. If your hygiene chairs tend to be well booked in advance, you can start focusing on your unscheduled treatment sooner than later.
- If you have patients on short notice lists for treatment send out a blast for your openings to let those patients know you can now see them.
 - Unscheduled Treatment is organized in most likely to least likely to book → toolbar → patient lists → Unscheduled Treatment → the list is organized in a most recently in/diagnosed to oldest treatment and should be worked top down for best results.