

Opening Day Check List

Peniche & Associates

Business Efficiency During Closure

- Insurance Accounts Receivable:
 - Audit, billed & updates
- Insurance credit balances:
 - Transferred to patient accounts, refunds
- Update insurance fee schedules:
 - Contact insurance company for the most recent fee schedule
- EOB's scanned
- Status code clean-up:
 - OBS, active, retention, Phase I/II
- Inventory; administrative & clinic:
 - Reorganize, purge, audit
- Stock Units
- Organize drawers and cupboards
- Patient education:
 - Update with Brand Deck, remove outdated materials
- Clean staff lounge:
 - Refrigerator, cupboards, lockers
- Cord management – Seriously
- Rate active patients' appointments 1-4
 - 1 = essential Doctor
 - 2 = virtual Doctor
 - 3 = virtual Assistant
 - 4 = phone conference

Patient Connections

- Updates from the doctor to build confidence
- Office signage supporting local hero's
- Fun social media posts from the team
- Virtual appointments:
 - Master New Patient Exam/active patients
- Drive-bys: Birthdays, Starts, debonds

Professional Connections

- Personal calls:
 - What can I do to help?

Updating Digital Media:

- Clean-up your digital presence:
 - Brandyourself.com
- Branding content:
 - Colors, fonts, filters, layout, storytelling
- Create or update your brand deck:
 - Landofyogg.com or Houmanity.com
- Put together your content creation guidelines
- Set up your ring light photo station

Maximize Your Virtual Schedule

- Choose your platform
- Create a virtual consultation space
- Set up online scheduling
- Create photo instructions:
 - Video, widget, written
- HIPAA compliant online forms
- Update your Welcome Letter/Email
- Create virtual exam/appointment codes (link with Gaidge)
- Master your Virtual New Patient Process

Opening Day Rehearsal:

- First day – Reunite, regroup, rehearse!
- What is the new norm?
 - Provide comfort
 - Build verbal and visual confidence.
 - Uniforms, laundry
 - Masks, gloves, shields
- New schedule
 - How many chairs will we schedule?
 - Where will we debond?
 - Do we need a production day?
- Virtual appointments going forward?
 - What is the new schedule template?
 - Virtual OBS appointments?
 - Aligner Checks, retainer checks, SOS appointments
- In Office Appointments:
 - What will be our braces on/off celebrations?
 - Do we need a reception shield?
 - How will we greet patients?
 - How will patients check in?
 - What are the off-limit conversations?
 - Do we keep the beverage station?
 - Will patients wait in the car?
 - Will we walk patients to the car?
 - Progress reports?
 - How will we communicate the changes to the parents?
 - Will we use the waiting area?
 - Game room / iPads / theaters?
 - Changes in the New Patient Process:
 - Greeting, tours, records, financial parameters?
 - Will we still do Same Day Starts?
 - New Patient Success Agreement:
 - Do we include information on virtual appointments?
- Team goals: Be realistic and celebrate wins!
 - New Patient Exams/Starts
 - Notes/Care Calls
 - Wins
- Be the best part of the patient's day!