



A helpful checklist for your practice closure during COVID pandemic



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With medical practices across the nation shutting down, as a practice management consulting company we've spent the week assisting our clients in the process.

While this isn't a complete checklist, we recommend the following steps if your practice needs to temporarily close your offices due to COVID-19-related reasons:

- Call all patients with the following:
 - o Current appointments on your calendar during the period in which you must close.
 - o Do your best to reschedule instead of cancelling their appointment for the first available date after the office is currently scheduled to re-open. Work to keep them scheduled with virtual consultations as best as possible.
 - o Let them know you will stay in touch should the office re-open sooner or will be closed longer.
 - o Remind them that they are welcome to reschedule their appointment at that time should conditions not return to normal, but that you understand how important the treatments are for them and don't want this to fall off their calendar altogether.
 - o For recent procedure – both surgical and nonsurgical – make sure they have the phone number of the medical director or treating provider in case they have any questions, emergencies or concerns during the period in which you are closed.
 - o Follow-up and post-procedure care is key! This is simply practicing good medical care at any time.
- Transferring your line to a lead team member's cell phone. This may be the medical director, practice administrator, medical personnel on call, patient care coordinator or lead receptionist. Make sure the team lead understands the responsibilities associated with this: they must be available during standard business hours as normal, and therefore will be compensated for their availability.
- Ensure this team lead has HIPAA-compliant access to your scheduling software.
- Review with your team lead when they are expected to be available by phone, as well as how to handle questions regarding:
 - o When they can schedule again: The first available date after the office is currently scheduled to re-open. Let them know you will stay in touch should the office be open again sooner or closed longer.
 - o Why the office is closed: Inform the patient that due to city/state/federal guidelines/the safety of our patients and staff, our practice is closed until <INSERT DATE HERE>. However, how may I help you? Certain members of our administrative team are still working from home to ensure patients' needs are met.
 - o How to handle a complication: The team lead will call the medical director or treating practitioner as soon as this call comes in and have the treating practitioner or on-call personnel return the patients' call with <X> hours.
- Review with your team lead how soon voicemails should be answered, should the phone go to voicemail.
- Review with each team member how soon they are expected to answer email during the closure. We recommend positions continue checking email and voicemails throughout the day.

Finally, be sure to continue to market to your patients in the meantime. Going dark will do more harm than good!

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