



# SPRING INTO ACTION: HOW SHOULD YOU PREP FOR A PRACTICE WARM UP?

WITH MARA SHORR, BS, CAC XIV; JAY A. SHORR, BA, MBM-C, CAC XIV; ALLYSON AVILA, JD, AND WENDY LEWIS



## UPDATE EVERYTHING

Now is the time to reevaluate what to change in your practice... and how. Make sure that all of your marketing material now includes images that represent the world in 2021. Show diverse photos of patients and images of your team in their personal protective equipment. If you've only been holding a team meeting monthly (or not at all), make sure you're switching to weekly huddles. Use this time to talk about the latest CDC guidelines as well as weekly specials. Let staff know the updated policies on calling out sick, how long they need to be out of the office if they

develop COVID-19 symptoms, and how these policies differ depending on vaccine status. Take a long, hard look at each of your technology platforms to determine what's working, what's not, and why. Before ditching the platform, set up a meeting with the company's rep to determine if you're fully utilizing the software. If not, pick a team captain to get the practice updated. If you are fully utilizing it and the software just hasn't kept up with the times, make a note when the contract expires and cancel it. Chances are that your team members and the overall structure of who is on your practice changed this past year. Take the time to review each team member's job description. Then, look at what is getting done in the practice, where efforts are being doubled up, and what is missed. That is truly the best way to review your team.

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#### BY THE BOOK

Whether you have an existing employee handbook that needs sprucing up or are looking to create a handbook, this spring is an ideal time to get it done. There are still so many uncertainties in the workforce amid COVID-19, and more and more regulations are being written every day. Every employer must protect themselves and have written guidelines that make all employees aware of what is expected of them.

I often get asked, “Why do I need a handbook?” The answer is usually pretty straight forward. It’s because you, as an employer, have numerous duties and responsibilities to the people you employ. These duties arise from the labor boards, the licensing boards, the Occupational Safety and Health Administration (OSHA), and other federal and state regulations.

We also have a new president who is creating additional requirements for employers.

For example, Joe Biden ordered the offices of OSHA to consider whether emergency temporary standards were necessary to protect workers.

Although COVID-19 is an emerging area of concern in what is essentially uncharted waters, there are still myriad legal mandates when it comes to employer responsibility to protect workers, which must be in writing and given to employees. One such example is sexual harassment. For several years, the “me too” movement was at the forefront of employer litigation. COVID-19 has most assuredly superseded that concern for now, but it still exists. What most people do not realize is that most states require a written policy detailing the employer’s sexual harassment policy and the steps that an employee can take to formalize their complaint.

Every employer must review their current policies and make sure they have a handbook. If a policy is

required by law to be in writing and provided to the employee and no such policy was provided, the employer faces liability that could have been avoided.

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**“TAKE A LONG, HARD LOOK AT EACH OF YOUR TECHNOLOGY PLATFORMS TO DETERMINE WHAT’S WORKING, WHAT’S NOT, AND WHY. BEFORE DITCHING THE PLATFORM, SET UP A MEETING WITH THE COMPANY’S REP TO DETERMINE IF YOU’RE FULLY UTILIZING THE SOFTWARE. IF NOT, PICK A TEAM CAPTAIN TO GET THE PRACTICE UPDATED.”**



#### DECLUTTER YOUR PRACTICE

If COVID-19 taught us anything, it’s that we need a lot less stuff to

bog us down in all aspects of our lives. So, keep your practice nimble, efficient, and updated to focus on what really matters: taking great care of patients, delivering superior outcomes, avoiding

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staff turnover, and preventing physician burnout.

Getting rid of clutter can be a cathartic experience.

Start by going through your file drawers to transition everything possible from paper to digital. Paper takes up room, ink fades, and pages can get misplaced. Download a scanner app and take a picture of the documents you need and save them indefinitely as a PDF, JPEG, or image. Try AdobeScan or Swiftscan. Ask your accountant how far back you still need to keep your tax returns and receipts. Save your digital documents and files in a universal file format, such as PDF, to be consistent and maximize usability.

Take a look through your office. Is there a stack of journals from the last decade piling up in the corner by your desk? Get rid of them and subscribe to the online version of the journals you still

want to read instead. Ditto for newspapers and magazines. Are you still hanging on to slides from the year of the flood? These can also be converted into digital files by using a slide-scanning service.

In the age of COVID-19, it's time to dump your clipboards, lose the copies of copies, and wave farewell to glossy handouts. File these under the things you will never need again, too: printed brochures, sign-in sheets, embossed folders and business cards that are missing your email, URL, and social handles.

Patient forms should be digitized and updated frequently to stay current with your practice, as well as the laws and regulations pertaining to your specialty and geography. This may include pre/post procedure instructions, consents, fee quotes, patient intake forms, teleconsult instructions, etc. Making sure that your practice is up to date on all things HIPAA will be a lot simpler this way. Adding a password protected

Patient Portal on your website landing page is another huge time and clutter saver. Patients can access the forms and information they may need 24/7 by using their own personalized code.

Take a deep dive into what is happening (or not happening) in your treatment rooms. If you're hanging on to lackluster energy-based devices, a clunker facial machine, or skincare products patients aren't buying anymore, turn them over STAT! Anything that doesn't generate revenue or add value to your practice should be on the chopping block. ■

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