



# How to Safely Reopen Your Practice During COVID-19

## with Digital Tools

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As you continue to ride the COVID-19 rollercoaster, one thing remains constant: your concern for your patients' health and your practice.

**But first: what is the state of primary care in the U.S. right now?**

The National Syndromic Surveillance Program (NSSP) found that [emergency department visits declined by 42% during the early phases of the pandemic](#).

The NSSP concluded that, "persons who use the [emergency department] as a safety net because they lack access to primary care and telemedicine might be disproportionately affected if they avoid seeking care because of concerns about the infection risk in the ED."

For dentists, it seems like patients are more willing to return – according to a [July 2020 survey by the Health Policy Institute \(HPI\)](#), "72% of adults are comfortable visiting the dentist right now and another 14% are willing to go if they had some reassurance from their dentist, the Centers for Disease Control and Prevention, or other authorities."

Access to primary healthcare is more important than ever. During the pandemic, when people are wary of hospitals, primary healthcare providers play an even larger role in supporting community health.

Difficult times pave the way for innovation, and primary care providers who implement technology as part of their reopening plans will better be able to serve patients until there is a vaccine for COVID-19. [HIPAA-compliant telehealth solutions](#) help providers fill in gaps in primary care when they reopen at reduced physical capacity.



Your practice can meet the needs of this new opportunity if you're able to build trust with patients through efficient communication, seamless telehealth practices, and end-to-end virtual experiences that reduce risk to staff and other patients. There is no better time to maximize your practice's use of telehealth and digital solutions to acquire new patients and create a better experience for your existing ones.

***Heads up: Every feature mentioned in this e-book can be seamlessly integrated with your EHR.***

But before you reopen your practice, you'll need to understand how COVID-19 is currently affecting your community. You're likely keeping an eye on local news and case counts, but here's a list of resources to help you keep up with ever-changing health guidelines.

## COVID-19 Information Resources for Primary Care Providers

- [Centers for Disease Control and Prevention \(CDC\) case count map](#)
- [CDC resources for health departments](#)
- [CDC's COVID-19 newsletter](#)
- [CDC State, Territorial, Local and Tribal Health Department Search](#)
- [Johns Hopkins University COVID-19 U.S. county map](#)
- Follow your region's health department on Twitter for real-time updates

While infection control and preparedness guidelines remain fairly consistent across the healthcare industry, administrative orders vary by region. Check your health department's website through the CDC and/or Twitter on a regular basis to keep up with the rapid flow of information.



# The COVID-19 Safe Patient Journey through Digital Tools

## Pre-appointment

- Patient books appointment online via website, Facebook, or Google listing.
- Patient fills out COVID-19 online screening form.
- Patient is triaged through online screening: staff determine in-person vs. virtual appointments.
- Patient receives automated appointment reminder with new safety protocol information.

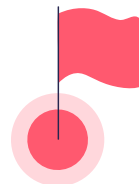


## During appointment

- Patient conducts virtual appointment via HIPAA-compliant telemedicine software OR patient sees staff member for an in-person appointment at reduced physical capacity at clinic.

## Post-appointment

- Patient pays for appointment online – no physical transaction with staff.
- Patient receives ongoing messaging re: at-home care, COVID-19 updates, and symptom management.



“This [technology] will totally transform the way you practice the administrative end of your business. Rather than having to do things manually, you’ll have the ease of automating your systems.”

– COO, Massachusetts-based dental practice

# Your COVID-19 Practice Reopening Checklist

## Hygiene, cleaning, and disinfection

In addition to your pre-COVID infection control protocols.

- Place alcohol-based hand sanitizer at all entrances and throughout the clinic
- Post reminders for staff and patients to apply hand sanitizer upon entering and exiting the clinic
- Identify all common areas and high-contact surfaces, and implement regular cleaning schedules for staff
- Conduct staff training for new cleaning protocols
- Provide staff with masks and other PPE as needed
- Conduct N95 respirator fit testing (if applicable)
- Train staff on how to report possible exposure to COVID-19 based on your region's guidelines
- Provide explicit instructions to staff on maintaining physical distance, such as avoiding shaking hands and other types of physical contact when possible

## Appointments and patient communication

- Stagger appointment times with a [controlled online scheduling system](#)
- Conduct online pre-screenings for COVID-19 symptoms with [customized patient forms](#)
- Send patients [email and/or text reminders](#) about protocols before their appointment, including mask policies, attending appointments alone if possible, and waiting in their car until it's time for their appointment
- Send patients a [text message](#) when it's safe for them to enter the clinic
- Communicate at-home care guidelines and protocol changes to patients on an ongoing basis [with text and email campaigns](#)

## Patient care

- Use [telehealth software](#) to conduct virtual appointments when possible
- Instruct staff to position themselves at least six feet from patients when possible
- Require staff and patients to wear masks when interacting
- Consider treating only one patient at a time to reduce risk of transmission between treatment rooms

## Staff areas and workflow

- Encourage remote work when possible
- Remind staff to stay home when they feel sick
- Conduct virtual staff meetings
- Stagger in-person staff start times
- Arrange office furniture to ensure staff are six feet apart
- Stagger staff break times
- Acquire dedicated staff work clothes and shoes
- Provide storage for staff street clothes and a dedicated changing area

## Reception

- Post signage to communicate protocols for masks, hand hygiene, physical distancing, and reporting illness or travel history
- Place lines on the floor to mark a six-foot distance from the reception desk
- Erect a transparent barrier, such as a plexiglass shield, around the reception desk
- Adopt [online payments](#) for a contactless billing experience

## Waiting area

- Create limited waiting room capacity based on a six-foot physical distance between patients
- Remove unnecessary items such as magazines, toys, candy, etc.





# Section 1: Pre-Appointment Best Practices

## Online booking

Your practice may be operating at reduced capacity with remote staff.

Online booking is low-hanging fruit for increasing practice efficiency during the pandemic.

Even before COVID-19, 43% of patient appointments were booked after hours. Patients don't want to book their medical appointments when they're working – they want to book after their kids are in bed or while drinking their morning coffee before work.

Moreover, COVID-19 has created new norms for performing tasks online/remotely, including mundane errands like booking medical appointments. Beyond convenience, however, online booking paves the way for other safe reopening best practices.

**Fact: Almost 50% of last-minute cancellations are filled with online bookings.**

### Online booking COVID-19 best practices

- Triage emergency appointments with online booking screening questions
- Maintain reduced physical capacity at your clinic by limiting in-person appointments through your online booking system
- Reduce remote staff workload by automating online booking and appointment reminders
- Increase patient volume by removing barriers to care for all those patients who are afraid to visit the emergency room





## Online booking implementation checklist

Integrate online booking software with your EHR and practice management software

Add an online booking widget to your website, Facebook profile, and Google listing

Set appointment availability to reflect reduced physical capacity at your clinic

Check real-time calendar sync for last-minute cancellations and rescheduling capabilities

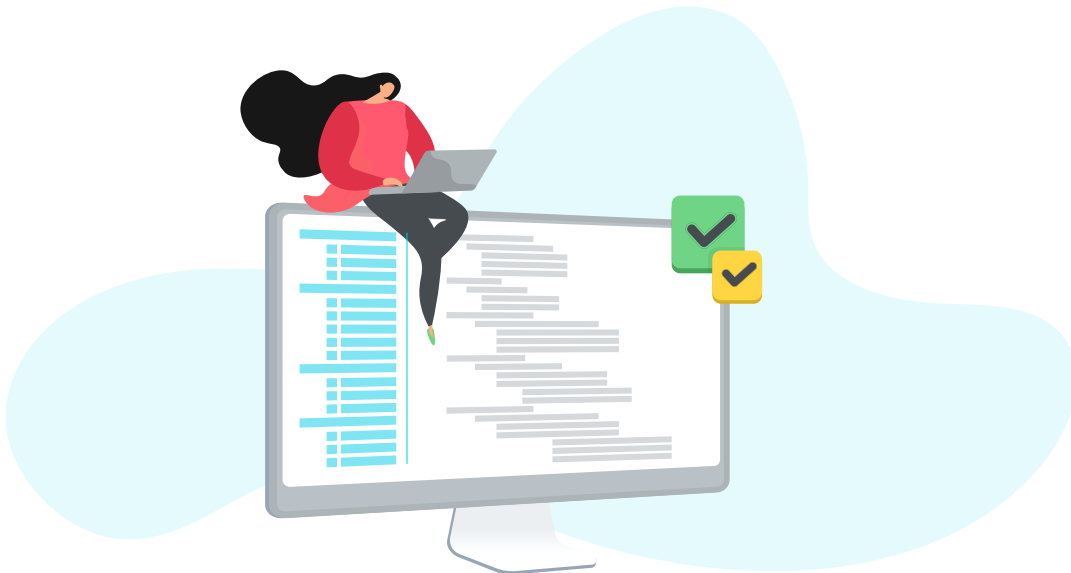
Add COVID-19 screening questions to your online booking experience

Triage appointments according to in-person vs. virtual care requirements during online booking

Remotely walk through online booking solution and screening questions with staff

Ask staff to quantify time spent on booking patients pre-online booking

Reassign staff duties and reduce workload based on time saved with online booking



“With online booking I can specifically block out my availability, if I don’t want a patient to be able to book me in the morning or in the afternoon. **I’m able to curate my schedule and who can have control over it.** Especially right now with COVID-19, it’s been a lifesaver.”

– Dr. Jennifer Plotnick, Grand Street Dental

## Online forms

While automated reminders push information to your patients, [HIPAA-compliant online forms](#) and online booking work together to pull in information about your patients.

During COVID-19, you'll need to collect more information about your patients online to eliminate paperwork and allow staff to remain informed when they're working remotely outside your clinic.

If you're operating at reduced capacity, online forms will eliminate the need to collect this information over the phone and allow your staff to focus on implementing and maintaining safety protocols instead.

### Online form COVID-19 best practices

- Screen patients for COVID-related symptoms prior to their appointment
- Reduce exposure for staff and other patients by triaging in-person vs. virtual appointments
- Determine PPE needs for staff prior to a patient's in-person appointment

### Online form implementation checklist

Integrate online forms with your online booking software and EHR

Digitize all existing medical forms: consent forms, medical history, mental health screening, etc.

Develop COVID-19 online screening form: symptoms, possible exposure, medical history, etc.

Send COVID-19 online screening forms to all patients as part of their online booking experience

Verify that all online form data is syncing with your EHR and other practice management software



## Automated reminders

When you're operating at reduced capacity and trying to improve patient experience during the pandemic, **automated reminders** eliminate the following tasks for staff who may still be working remotely:

- Playing phone tag
- Leaving voicemails
- Manually confirming appointments through text message

During COVID-19 your practice may instead redirect that brainpower to communicating important information to patients before their appointment. Automated reminders are part of a suite of tools you can use to improve communication with your patients during difficult times like these.

**Fact: Clinics who use automated reminders save 15 hours per month.**

### Automated reminder COVID-19 best practices

- Build trust with patients by communicating safe reopening practices through automated reminders
- Communicate new intake procedures, mask requirements, and hygiene practices prior to appointments
- Educate patients about COVID-19 symptoms, at-home care, and local administrative orders

### Automated reminder implementation checklist

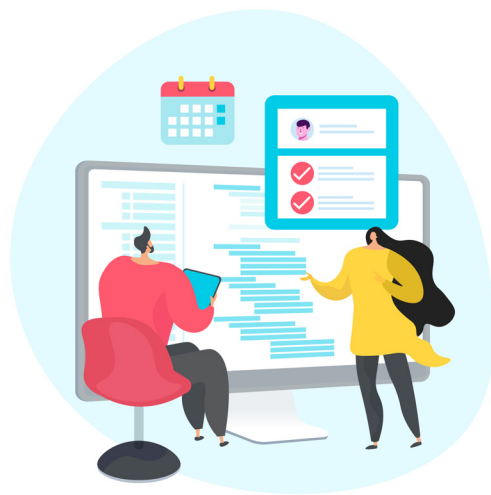
Integrate automated reminders with your online booking software and EHR

Draft new COVID-19 patient reminders with staff

Remotely walk through process for drafting and deploying new automated reminder messages with staff

Ask staff to quantify time spent on patient reminders

Reassign staff duties and reduce workload based on time saved with automated reminders



## Section 2: During the Appointment

Note: This section covers virtual appointment best practices. For guidance on in-person clinic safety protocols, refer to the COVID-19 Practice Reopening Checklist.

### Virtual appointments

The use of telehealth software has skyrocketed since the beginning of the COVID-19 pandemic.

While patients are hesitant to seek medical care at a hospital, they may be just as reluctant to visit your clinic in person for primary healthcare services like:

- Symptom evaluations
- Diagnosis and treatment of common minor conditions such as yeast infections, rashes, allergies, etc.
- Prescription drug refills
- Sick notes
- Medical referrals
- Lab work orders
- At-home care advice
- Mental health assessments

**The good news is that you can provide these services online.**

Clinics don't need to sacrifice on patient volume due to fear of COVID-19. Primary healthcare providers can instead increase patient volume by offering robust telehealth services that replace in-person appointments with HIPAA-compliant video chats.



# How to conduct a virtual appointment

The use of telehealth software has skyrocketed since the beginning of the COVID-19 pandemic.

While patients are hesitant to seek medical care at a hospital, they may be just as reluctant to visit your clinic in person for primary healthcare services like:



## Before consultation:

- Triage virtual patients through **online booking**
- Ask pre-screening questions via **online forms**, such as reason for visit
- Ask patient for photos of symptoms
- Collect consent for video conferencing for new patients via online forms
- Test your webcam, microphone, and wireless connection
- Read patient history



## When consultation begins:

- Open the patient's EHR
- Ensure video chat is being recorded
- Obtain verbal consent to virtual appointment recording
- Confirm patient's identity and that they are situated in a private location
- Run through the same clinical guidelines as you would during an in-person visit



## When consultation is ending:

- Recap the appointment assessment and plan, and confirm that the patient understands
- Send prescriptions to the patient's pharmacy
- Send requisitions or referrals to the patient or appropriate office
- Complete appointment notes in EHR
- Complete and submit any necessary forms
- Collect online payment

## Virtual appointment implementation checklist

- Choose a [HIPAA-compliant telehealth provider](#) that integrates with your EHR
- Develop patient triage selection criteria for virtual appointments
- Determine mechanism for patient photo submissions
- Communicate patient triage protocol to clinic staff
- Test all staff webcams, microphones, speakers, and wireless internet connections, at their respective locations (at clinic and remote)
- Develop standard virtual appointment scripts for staff
- Practice virtual appointment flow with staff

**Fact:** Many states [now require private insurance companies to reimburse providers for care via telemedicine](#).





## Section 3: Post-Appointment Best Practices

### Online payments

In 2019, [one in three Americans](#) said they skipped medical treatment because of the cost.

***Fact: 80% of patients make their payment within 10 business days through NexHealth.***

While [online billing](#) may not remove financial barriers to healthcare, it does create new avenues for flexible payment plans that make it easier for patients to access a primary healthcare provider. And during COVID-19, online payments mean contactless transactions – keeping both your staff and your patients safe from disease transmission.

#### Online payment COVID-19 best practices

- Collect payment immediately after in-person and virtual appointments via text and/or email
- Set up special payment plans for patients affected by COVID-19
- Reduce number of reception staff required in-office as you eliminate physical methods of payment

#### Online payment implementation checklist

Integrate online payment with your EHR – effective software reads treatment plans and bills patients based on their records

Verify that electronic transfers are complete with your online banking portal



## Ongoing messaging

The patient experience doesn't end when your patient completes payment. [Ongoing patient communication](#) is essential during the pandemic, when information is flowing almost too quickly to keep up with.

Post-appointment patient communication can mean sending your patients email and/or text messages before they even reach the parking lot, or immediately after a virtual visit.

If you don't know what to communicate because there is simply too much to sift through during the pandemic, here are some topics to consider.

### Communication messages for patients during COVID-19

- Your timeline for re-opening your practice
- Sanitization and PPE protocols at your clinic
- Whether a patient at your clinic has contracted COVID-19
- What to expect during an in-person appointment
- Patient procedures that will still be taking place at your clinic
- Patient procedures that may be postponed due to COVID-19
- How to reschedule appointments that were postponed during the first phases of the pandemic
- At-home care guidelines after virtual appointments
- Requests for feedback from patients so you can improve safety and overall experience
- Preventative care best practices to eliminate the need for in-person appointments



## I If you read nothing else: Key takeaways

- During the pandemic, when people are wary of hospitals, primary healthcare providers play an even larger role in supporting community health.
- COVID-19 has created new opportunities for primary healthcare providers to build trust with patients through efficient communication, seamless telehealth practices, and end-to-end virtual experiences that reduce risk to staff and other patients.
- COVID-19 has created new norms for performing tasks online/remotely, including booking medical appointments.
- During COVID-19, you'll need to collect more information about your patients online to eliminate paperwork.
- Automated reminders eliminate manual tasks for staff who may still be working remotely.
- Primary healthcare providers can increase patient volume by offering telehealth services that replace in-person appointments with HIPAA-compliant video chats.
- Online payments mean contactless transactions, which keep your staff and your patients safe from disease transmission.
- Ongoing patient communication after appointments includes sending patients information about safe reopening practices, clinic hygiene protocols, preventative care, at-home care guidelines after virtual appointments, and more.



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