

# COVID-19 Evolution Checklist for Community Practices

Considerations for practices emerging from  
COVID-19 closures or partial closures and tips  
on how to re-evaluate pandemic preparation

## Gather Requirements

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CDC criteria <https://www.whitehouse.gov/openingamerica/#criteria>

Criteria from your state and local government

Special procedures for COVID-19 related biohazard waste

Local health department reporting guidelines for COVID-19 cases

## Establish Protocols

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Establish a protocol for scheduling prioritization

- Consider canceled appointments that occurred as a result of closure

Determine the services you will be able to perform safely within the clinic and those best suited for telehealth

Create new protocols for when to implement telehealth

Adjust existing scheduling cancellation policies and fees to allow for more flexibility

Determine staffing protocols

- Leverage functions that can continue to work remotely to reduce the number of individuals in the practice

## Establish Protocols (cont.)

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Consider placing on-site personnel on rotating teams to ensure continuity

Outline health screening measures for employees as per CDC guidelines

Determine staff testing protocols and symptomatic staff protocols (temperature check policy)

Outline new cleansing and disinfecting regimens and infection control standards

### Tip for Establishing Protocols

- When implementing new telehealth protocols, specifically look at how it might be able to aid in scheduling efficiency

## Safety & Environmental Operational Considerations

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Determine the PPE needed for both your patients and staff and the rate at which you can stock

Consider storing a 6-month supply of PPE once shortages and allocations have eased

Source test kits and lab supplies or thermometers according to your new testing protocols

Map a social distancing patient flow and workflow

Inventory what may be needed to implement your solutions, such as supplies needed for triaging outside

Consider offering curbside care

Staff flow paths – how to keep workspaces and zones 6 feet apart

Review how patient scheduling will need to change and if you need to allocate more time in your schedule

Document and communicate new rules clearly

Limits on non-patient visitors

Separation of symptomatic patients

Establish office environmental changes

Determine the need to reconfigure your space (chair placement for patients in waiting room)

Evaluate the need to add barriers like screens or windows at counters to protect staff

Remove communal objects in waiting areas and exam rooms that cannot be cleaned (magazines, toys, etc.)

Leverage technology such as mobile payment apps, patient portal billing or online bill pay to allow for zero contact transactions

Adjust scheduling and office hours to limit the number of people in the office

## Financial Operational Considerations

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Assess patient assistance opportunities – research what manufacturers are doing with regard to expanding their programs due to COVID-19

Update your EHR for new codes and billing updates based on COVID-19 rules

Ensure coding and billing staff receive education on new/updated rules under COVID-19

Understand reporting requirements and deadlines for federal funds – review SBA 7(a) PPP loan (unforgivable portion)

- Set up separate checking accounts

- Do not commingle funds

- Set up separate GL accounts

- Keep detailed records

- Do not double account same expense for PPE and HHS

- Alert staff to phishing scams

- For PPP: 8 weeks to spend money on payroll (75%+) and rent/utilities (25%≤) from when money entered bank account (Note: discussion to extend past 8 weeks)

- HHS has less guidelines on regulations and requires attestation

Review processes on write-offs due to shifting payer mix/patients who are unemployed/uninsured

Review and adjust pro forma based on pre-COVID-19 assumptions

### Tip for Financial Operational Considerations:

- Approach patient finance matters with a high degree of empathy, they may have less disposable income or be suddenly uninsured/underinsured

## Telemedicine Considerations

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Ensure maximization of telehealth billing opportunities and train staff on coding

Begin looking for HIPAA-compliant format

- Use customizations for virtual waiting room, background, branding

Determine how you can incorporate telemedicine into day-to-day operations

- Utilize for after hour on-call providers; decrease hospitalizations

- Employ to help alleviate shortage of exam rooms and aid in scheduling efficiency

## Tip for Telemedicine Considerations:

- Survey patients to enhance patient experience (likes vs. dislikes); don't wait too long (bad experience may affect practice to utilize technology moving forward)

## Communications & Marketing Considerations

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Create a communications plan with your marketing team or vendor specifically for COVID-19 re-emergence

Identify effective touch-free modes of communication that work best for your practice and your patient population (i.e., patient portal website, telephone, e-mail, pre-recorded messages)

Produce and share information to keep patients informed on reopening with emphasis on policies and procedures that will reassure their safety

Educate patients on a consistent basis with updates on evolving changes related to COVID-19

Have in-office patient educational material on COVID-19 available (digitally if possible, posters or other touch-free, in-office postings also work well)

Update hold message (i.e., telehealth option, practice safety measures, new schedule, etc.)

Allow referral networks time to rebuild, be prepared and think creatively

- Communicate your re-open plans to your referring physician network

Review and update your digital presence

- Website: ensure it is updated post-COVID-19 (Does it address COVID-19 from a patient's perspective? Does it address how to solve patient problems/concerns?)

- Social media campaigns should be calm, transparent and confidently directed at patients

- Emails/text messages: leverage two-way texting to contact patients

Employ touch-free strategies; consider having patients use apps on their personal smartphones instead of in-office touch screens

## Tips for Communications & Marketing Considerations

- Utilize staff to build your database – it's worth time and effort to call patients to get emails and mobile numbers for texting; communicate changes for a new touch-free environment
- Use of video – authentic low-production pieces are a great way to do quick office walk-throughs for patients. Show the new measures in place so patients know what to expect on their visit and ease anxiety. Videos can be sent by text, email or through your patient portal before the visit.

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