



RECALLMAX™



RecallMax™ COVID-19
Recovery and Beyond

3 Step Action Plan

Management Guide

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Introduction - Our Commitment to Your Practice

At RecallMax™, we are committed to supporting dental practices to recover from the COVID-19 crisis and regain the financial viability of their clinics as quickly as possible.

Our 3 Step Action Plan, combined with RecallMax™ COVID-19 Recovery Features, will assist you in maximizing the re-scheduling of your patients and accelerating the overall recovery of your practice once bans are lifted.

This management guide is intended for owners or managers responsible for the recovery of their practices from the COVID-19 service bans. It provides detailed guidelines and recommendations to help you lever your recovery, give your team clear direction, and ensure your patients do not fall victim to attrition.

In addition to this management guide, we are also providing checklists, instructional videos, and other resources office staff can use to get re-started and maximize the scheduling of patients. These include the following resources that can be downloaded from our RecallMax™ COVID-19 resource web page or requested from RecallMax™ support:

- 1 COVID-19 Recovery Getting Started Resources** – checklists, instructional videos and other materials office staff can use to get re-started and maximize the scheduling of patients.
- 2 COVID-19 Patient Communication Guidelines** – call scripts and other communication guidelines offices can use to make COVID-19 related announcements; inform and reassure patients, properly confirm and schedule appointments, address COVID-19 related questions and concerns patients are likely to have once bans are lifted.
- 3 RecallMax™ Service and Support Teams** – are available to assist practices with the implementation of recovery strategies including providing instruction on the proper use of RecallMax™ COVID-19 recovery features.

Samples of announcements and other patient communication recommendations referenced in this guide are provided in the COVID-19 Patient Communication Guidelines information package located

at the RecallMax™ website address reference below. Also, a summary of RecallMax™ COVID-19 Recovery Features are enclosed for reference purposes.

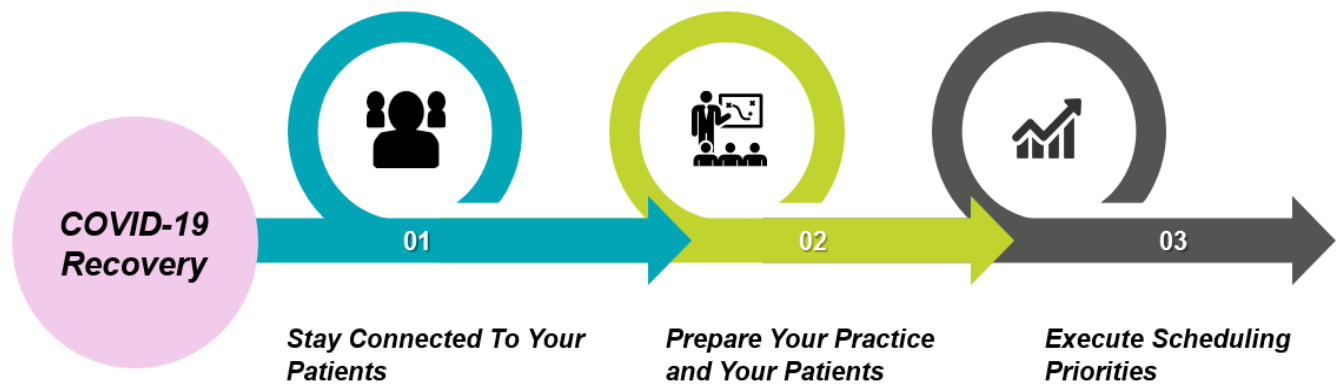
Although guidelines and resource materials reference the utilization of RecallMax™ features throughout, all practices interested in maximizing their recovery can follow the management guidelines regardless of your level of automation.

All practices are welcome to use RecallMax™ COVID-19 recovery guidelines and resource materials.

See www.recallmax.com/covid-19resources or contact support 1800-651-8603 Ext1



Action Plan Overview



Our 3 Step Action Plan outlined below, combined with RecallMax™ COVID-19 Recovery Features will assist you in maximizing the re-scheduling of your patients and accelerating the overall recovery of your practice once bans are lifted.

Step 1 – During bans – stay connected to your patients.

- 1 Recommendations to keep your patients informed and engaged while service bans are still in place.

Preparing for your return.

Step 2 – Once bans are lifted – get your practice and your patients prepared to recommence with treatment.

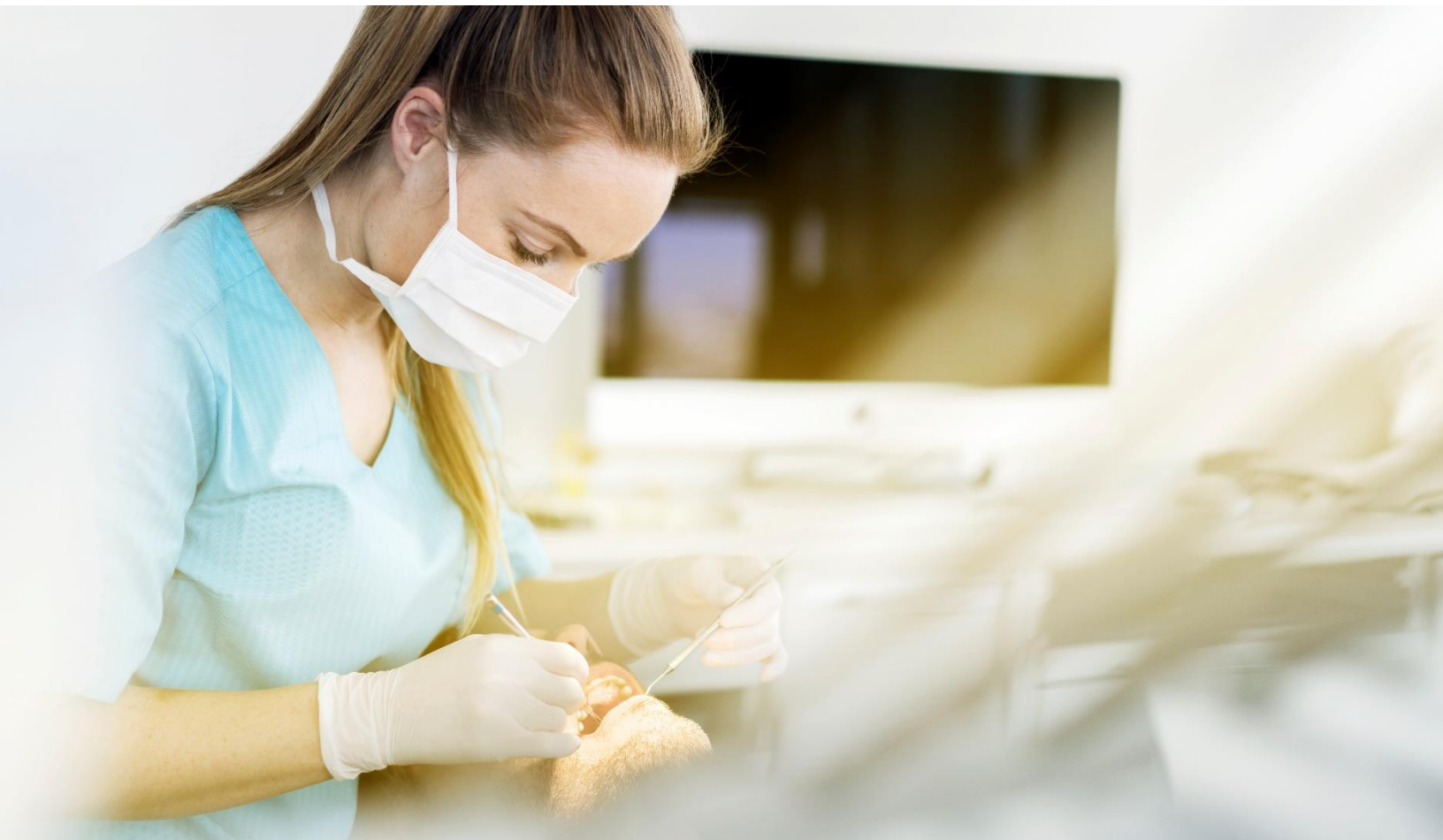
- 1 Essential steps in getting your practice prepared.
- 2 Essential communications to your patients.

Step 3 – As soon you have completed preparing, execute the scheduling priorities outlined below to maximize filling your schedules.

- 1** Confirm upcoming appointments still existing in your schedule.
- 2** Reschedule missed COVID-19 hygiene and restorative appointments.
- 3** Incorporate / use short notice appointment lists to catch up on potential backlogs of missed COVID-19 appointments.
- 4** Reactivate the follow-up and scheduling of regular unscheduled hygiene and recall patients.
- 5** Reactivate the follow-up and scheduling of unscheduled restorative treatment patients.

Scheduling
priorities
once bans
are lifted.

Detailed information related to each step is provided on the following pages.



Step 1 - Stay Connected to Your Patients

Staying connected to your patients, while service bans are in place is an essential part of your overall recovery. Responding to patient questions and concerns and keeping patients informed of pertinent COVID-19 related developments, serves to reassure patients in uncertain times and builds trust in your expertise and commitment as their care provider.

Recommendations related to keeping your patients informed and engaged while service bans are in place include:

1 Send out an initial announcement / newsletter informing your patients.

- a Practice wide announcement / newsletter / social media postings / website page updates.
- b Content / messaging recommendations:
 - Thinking of you and re-assurance – this will end.
 - Situation update – actions your office and profession is taking.
 - What to do in the event of a dental emergency.
 - How to get a hold of us if you have questions or need advice – contact instructions (call / email / text) and when patients can expect a response.
 - Reassure patients – send positive / uplifting communications.

2 Promptly respond to patient questions or concerns.

- a Set up a daily routine to monitor and respond to patient questions, concerns or enquires.
- b Advise your patients of your routine in newsletters, announcements, social media postings, website page updates, and add this information to voicemail messaging as well.
- c Use personalized email and text chat to stay connected to your patients – emails and texts are an efficient way to respond to patients and track communications.

3 Send out regular announcements / newsletters updating and connecting with patients.

- a Practice wide announcement / newsletter / social media postings / website page updates.
- b Send regularly – once every two to three weeks.
- c Content / messaging recommendations:
 - Thinking of you / positive reinforcement / re-assurance.
 - Situation update – relevant dental information / practice plans.
 - Reminders – what to do in the event of a dental emergency, have questions, or are in need of advice.
 - Homecare tips – what you can do to protect your dental health during bans.
 - Other information patients would find helpful and / or uplifting.

RecallMax™ provides a complete suite of patient communication tools including practice wide announcements and newsletters as well as fully integrated email and text chatting that can be remotely accessed from the comfort of your home.



Step 2 - Prepare Your Practice and Your Patients

Once bans are lifted – get your practice and your patients prepared to recommence treatment by following the guidelines and recommendations outlined below:

- 1 Once the ban in your area is lifted – sort out your post COVID-19 clinic, scheduling and appointment protocols.** Dental Colleges will issue guidelines governing the treatment of patients once non-essential COVID-19 treatment bans are lifted. Determine the changes you will need to make to your clinical, scheduling and appointment protocols to accommodate guidelines in your area.
 - a** Adjust your schedules to accommodate health guidelines and get prepared to send out an announcement to your patients and turn on automated appointment confirmation and reminder systems (see Item 9 for advanced scheduling considerations).
- 2 Get ready to announce your return and sort out all essential patient communications.**
(See COVID-19 Recovery Resources – Call Scripts and COVID-19 Patient Visit Guide for samples.)
 - a** Prepare scripts and communication guidelines staff can follow to inform and reassure patients related to essential health information; properly confirm and schedule appointments given health requirements and changes in your protocols, and address COVID-19 related questions and concerns patients are likely to have. These are all essential communications and should not be left to staff “winging” it in the moment.
 - b** Prepare scheduling and confirmation scripts outlining essential health and procedure information as well as responses to questions and concerns patients are likely to have. Review these with your staff and enter this information into RecallMax™ automated call scripts and communication coaching outlines for quick access.

3 Announce your return and turn on all automated appointment confirmation and reminder systems.

(See COVID-19 Recovery Resources – Re-opening Announcement for sample.)

- a** Let your patients know when your ban has been lifted and that you're happy to be able to see everyone again. Reassure your patients you are taking proper precautions and ensure your announcement contains essential health and appointment information. Modify automated confirmation and reminder messages to include appropriate COVID-19 appointment information and pre-visit instructions (see item 4).
- b** Practice wide announcements can be made through RecallMax™ Announcement Features and also posted to social media sites and practice website pages.
- c** Announcement message content recommendations:
 - Provide details – re-opening of your office / re-instatement of services.
 - Reassure patients – steps you are continuing to take to protect patients.
 - Provide post COVID-19 Dental College clinical procedures and guideline requirements.
 - Provide post COVID-19 appointment procedures and instructions.
 - Please let us know if you have any dental concerns and we will get you scheduled ASAP.
 - Invitation – your dental health is important to us, please call and we will make every effort to get an appointments scheduled for you ASAP.

4 Recommended changes to automated confirmation and reminder messages.

(See COVID-19 Recovery Resources – Auto Messaging Recommendations for samples.)

- a** Add appropriate COVID-19 appointment information and pre-visit instructions to automated messages including;
 - Health screening questions and notification to contact office to re-schedule if necessary.
 - Modifications to appointment procedures and other pertinent health procedure instructions.
 - Reassure patients of precautions being taken – invitation to call with questions or concerns.
 - Request confirmations ASAP – so you can make appointments available to other patients.
- b** These notifications can be quickly added to existing RecallMax™ automated messages through settings.

- 5 What is the best scheduling strategy to follow?** The scheduling priorities outlined below and detailed on the following pages will allow you to maximize the re-scheduling of your patients and accelerate the recovery of your practice. These recommendations incorporate priorities based upon maximizing existing schedules, which patients are most likely to re-schedule once bands are lifted, and proven sources of patient scheduling based upon extensive recall experience. Results are further enhanced by making best use of RecallMax™ COVID-19 recovery and automated messaging features, which also save valuable time.
- a** Confirm upcoming appointments still existing in your schedule.
 - b** Reschedule missed COVID-19 hygiene and restorative appointments.
 - c** Incorporate / use short notice lists to catch up on backlogs of missed appointments.
 - d** Reactivate the follow-up and scheduling of regular unscheduled hygiene and recall patients.
 - e** Reactivate the follow-up and scheduling of unscheduled restorative treatment patients.
- 6 Key scheduling tips.**
- a** Personally confirm all appointments a minimum of 3 days in advance for the first 60 to 90 days once bans are lifted – **do not rely on automated messaging alone**. Patients will require reassurance and support in re-commencing treatment. This will also enable you to screen patients for potential health issues, ensure patients understand changes in procedures, and enable you to answer patient questions or address patient concerns.
 - b** Once bans are lifted, you may find yourself in a position where you have trouble scheduling patients that have missed hygiene and recall appointments due to upcoming pre-appointed patients filling your schedule and/or reductions in the number of patients you are able to schedule due to the implementation of health guidelines. This could result in backlogs of patients needing earlier appointments (requiring urgent care) or patients wanting earlier appointments. Incorporating/using short notice lists is an effective means of capturing and catching up on backlogs of missed hygiene and recall appointments and is highly recommended. RecallMax™ provides customized COVID-19 short notice lists to do so.
- 7 Consider changing or increasing your hygiene schedules on a short term basis** to make appointments easier for patients to attend and catch-up on backlogs of patients that may need appointments.
- a** Later day and weekend appointments will assist patients who are concerned with appointments interfering with their work schedules to return for treatment.

- b** Consider increasing your hygiene schedule on an interim basis to catch up on potential backlogs of patients. List counts can help determine how much more hygiene may be required to catch up.
- c** Any increases in hygiene schedules should be implemented slowly. Add one or two extra hygiene days per week to start and monitor your teams ability to fill these appointments before extending your schedule further.

8 Consider offering patients payment options. Many patients will experience financial difficulties due to closures of non-essential business and/or may lose dental benefits entirely. To assist patients in acquiring treatment, consider offering monthly payment terms at no interest or signing up to a patient finance credit service.

- a** This could involve offering patients payment terms over two or three months on preventive services so patients can keep up with preventive care. Restorative terms could be offered over longer periods depending upon the amount of treatment involved.
- b** In all situations, show your patients empathy and support for their circumstances. Offering additional homecare instructions for patients that are needing to suspend treatment until their financial circumstances change can be very helpful.

9 Advanced scheduling considerations.

- a** You may need to adjust your existing pre-appointed hygiene and recall schedules to accommodate guidelines. If so, make schedule adjustments before you commence confirming upcoming appointments or reactivating automated confirmation messaging systems.
- b** Depending upon your confirmation notification settings, adjust your hygiene and recall schedules 2 to 3 weeks in advance and continue to monitor Dental College notifications for guideline changes that may affect your schedule.
- c** If guidelines require you to extend appointments, the time in-between appointments, or stagger appointments, you may need to find openings for patients that no longer fit into your schedule. This can be further complicated if your schedules are heavily pre-appointed and you need to find appointments for patients that missed appointments during shutdowns.
- d** Assigning patients to short notice lists is a way of capturing patients and finding openings for them as you proceed after bans are lifted. Other options include increasing hygiene schedules on an interim basis to provide appointments. RecallMax™ provides customized COVID-19 short notice lists to assist practices with scheduling backlogs of patients.

Step 3 - Execute Scheduling Priorities

Execute the scheduling priorities outlined below to maximize the re-scheduling of your patients and your recovery. These recommendations incorporate priorities based upon maximizing existing schedules; which patients are most likely to re-schedule once bands are lifted; and proven sources of patient scheduling based upon extensive recall experience.

- 1 Start By Confirming Upcoming Appointments Still Existing In Your Schedule.** This will ensure that anyone who is booked in the future is reminded they have an appointment and does not fall behind in their hygiene and recall schedule. Every effort should be made not to move these patients other than for scheduling adjustments to accommodate health guidelines.
 - a** Also, **personally confirm appointments** in your schedule for first 60 to 90 days a minimum of 3 days before appointments. **Do not rely on automated messages alone.**
 - b** Use RecallMax™ automated appointment confirmation lists for this task.
- 2 Reschedule Missed COVID-19 Hygiene and Restorative Appointments.** Contact and re-schedule patients that missed appointments due to COVID-19 bans. These patients are more likely to schedule given they previously had appointments scheduled.
 - a** You can find these patients on RecallMax™ Missed / Cancelled Appointment list which can be chronologically sorted back to when bans began (up to 180 days).
 - b** Contact and schedule patients on this list – leave messages and quickly send personalized email or text messages to patients that you are not able to connect with.
 - c** Re-attempt scheduling of these patients every two weeks for 4 to 6 weeks calling, leaving messages and sending personalized emails and texts.
 - d** Remove patients from this list after three or four attempted contacts and remember, as patients are removed from this list, they will not be lost as they will be captured by due and late patient lists and fall into their regular hygiene and recall follow-up queue.

- 3 Incorporate / Make Best Use Of COVID-19 Short Notice Appointment Lists.** You may find yourself in a position where you have trouble scheduling patients that have missed hygiene and recall appointments due to upcoming pre-appointed patients filling your schedule, and or reductions in the number of patients you can schedule due to the implementation of health guidelines. This could result in backlogs of patients needing earlier appointments (requiring urgent care) or patients wanting earlier appointments.
 - a** Capture and catch up on backlogs of patients needing or wanting appointments by assigning them to RecallMax™ short notice list that have been enhanced to identify missed COVID-19 appointment patients.
 - b** Offer patients an opportunity to be added to a COVID-19 short notice list and be notified of openings that occur.
 - c** Easily identify and prioritize urgent COVID-19 appointment patients on these lists.
- 4 Reactivate the Follow-Up and Scheduling of Regular Unscheduled Hygiene and Recall Patients.** Review your hygiene bookings for the next 4 weeks to get a sense as to how many openings you are needing to fill. From there you have two sources of scheduling patients outside of missed COVID-19 appointment list patients;
 - a** Check for regular, non COVID-19 related patients on your short notice hygiene and short notice recall lists – send notifications to these patients.
 - b** Re-activate the follow-up on your due and late lists – these lists are all pre-organized to give you the best scheduling results when you work them from the top down (patients coming due, patients most recently due, patients longest overdue).
 - c** Auto messaging is going to assist in scheduling due and late patients – however, most patients book from personal contact so it's best if you connect with these patients on a personal level.
- 5 Re-activate the Follow-Up and Scheduling of Unscheduled Restorative Treatment Patients.** Focus on filling restorative chairs as a priority once hygiene and recall chairs start to fill.
 - a** If you have patients on treatment short notice lists – send out notifications appointments are available.
 - b** Contact most recent unscheduled restorative treatment patients on your list – leave personalized messages, emails or text messages for patients you are unable to reach.

Our service and support teams are available to assist you with implementing recovery strategies including providing instruction on the proper use of RecallMax™ COVID-19 recovery features.

Implementing Your Plan

To assist you with implementing your plan – we have provided an overview of the of the key action steps and resource coaching tips below.

- 1 Once the ban in your area is lifted** – sort out your post COVID-19 clinic, scheduling, and appointment protocols; get your patient communications and instructions sorted out; send out a practice wide announcement and turn on all automated appointment confirmation and reminder systems; schedule the first wave of patients that respond.
 - a** Time spent on preparing your practice and your patients is time well spent – proper preparation will provide significant returns.
- 2 Once the first wave of patients have responded** – work missed COVID-19 appointment lists and scheduling priorities for the next 30 to 60 days – reschedule as many appointments as possible during this time.
 - a** Maximize the number of administrative staff working the recovery plan for the first 30 to 60 days until schedules start to fill – cutback resources from there. With RecallMax™ call list features, hygiene staff can also assist in contacting and scheduling patients.
 - b** Make sure to put short notice lists to use to capture and catch up on backlogs of patients needing appointments.
- 3 Assess results after 60 to 90 days** – based upon dashboard analytics, reset your plan and resources as needed from there.
 - a** Adjust administrative resources based upon remaining number of patients requiring appointments and rescheduling opportunities for your practice.

In addition to this management guide, we have also provided getting started resources consisting of checklists, instructional videos and other materials office staff can use to get re-started and execute the strategies continued herein.

Our service and support teams are available to assist you with implementing recovery strategies including providing instruction on the proper use of RecallMax™ COVID-19 recovery features.

We are committed to supporting practices make a full recovery – do not hesitate to contact support if you need assistance.



RecallMax™ COVID-19 Recovery Features

RecallMax™ COVID-19 Recovery Features will assist your practice to capture and re-schedule missed COVID-19 appointments as well as maximize the overall scheduling of your patients once bans are lifted. Features include:

- 1 **RecallMax™ Announcement Features** – make practice wide COVID-19 announcements to keep your patients engaged during shutdowns and provide important appointment information once bans are lifted.
- 2 **Missed COVID-19 Appointment Lists With Personalized Messaging Features** – RecallMax™ captures and provides automated lists of missed COVID-19 hygiene and restorative appointments making it possible to quickly identify, contact and re-schedule patients. Personalized email and text chat messages can be quickly sent to patients from these lists to assist in re-scheduling.
- 3 **COVID-19 Virtual Waiting Rooms** – protect your patients and easily establish virtual waiting room procedures with automated text reminders and arrival notifications.
- 4 **Enhanced COVID-19 Messaging** – easily modify automated messages to reassure your patients and provide important post COVID-19 appointment information.
- 5 **Enhanced COVID-19 Short Notice Scheduling** – automatically alert missed COVID-19 appointment patients of openings and quickly fill your schedule while finding appointments for patients that may have difficulty getting back in.
- 6 **Automated COVID-19 Call Scripts** – acquire instant access to call scripts and other COVID-19 communication guidelines to properly inform and schedule patients, and address COVID-19 related questions and concerns once bans are lifted.

RecallMax™ provides a complete COVID-19 recovery solution that can accelerate your recovery and allow your practice to come back stronger than before.

Not a Customer?

If you'd like further information or a demo of how RecallMax™ can assist your practice, email sales@recallmax.com or call 1.800.651.8603.

We're here to help you navigate COVID-19 and to help you get started, you can try RecallMax™ for free while service bans are in place. We will also waive the set-up fee and once service bans are lifted, you will have an additional 60 days to trial RecallMax™ at no cost and with no obligation.



No Contract
or Obligation



No Set-Up Fee



60-Day Free Trial
Post-COVID-19