



# Recovery Reboot

Your Path To Powering Up Your Practice

**2 Seven To Ten Days From Reopening**



**HEA**<sup>®</sup>  
Healthy Eyes Advantage

### Business Strategy

#### Initiate Collaborative Care With PCPs

- ☐ Reach out to local primary care offices to promote co-management opportunities.
  - Just as independent eye care professionals (IECPs) have a backlog of patients waiting for comprehensive exams, PCP offices have a backlog of chronic disease patients, especially diabetics, who represent a significant opportunity to expand your patient base.
  - HEDIS Scores and Star Ratings depend on these patients being seen.
  - Make sure PCPs know you will work to get their patients scheduled and the appropriate follow-up documentation back to the PCP in a timely fashion.

#### Schedule PCP Referral Patients

- ☐ Begin scheduling these medical referrals in week three or four unless medically necessary, urgent to prevent permanent vision loss or other morbidity, or to fill open appointment slots you cannot fill with comprehensive exams or out-of-pocket medical services.

#### Review Practice Financials

- ☐ Review your balance sheet and income statement.
  - Identify your liabilities and work diligently to optimize your monthly expenditures.
  - Leverage all the resources available to you, including enhanced unemployment and any funding you may have received through the CARES Act or other pandemic-related sources.

#### Set And Review Your Budget

- ☐ Set and review your budget for the next few months, focusing on your fixed and variable expenses. Take stock of the working capital you'll need during the next few months, giving consideration to the amount that can come from reserves and the revenue you'll need to produce. Revisit this at least every couple of days.



### Business Strategy

#### Boost Revenue And Relieve Patient Financial Stress

- Consider how you can help alleviate impact to your patients' ability to pay, boosting your revenue while helping relieve financial stress for your patients.
  - It is an understatement to say that consumers, likely including your patients, have also been hard hit by the pandemic, with many facing loss of income and the potential for diminished available credit.
  - If you don't accept CareCredit, consider implementing it as an additional payment method for your patients. HEA members have access to a significant discount when signing up. If you accept CareCredit, now is a good time to make sure you prominently display this in your office and that all staff are well-versed in offering this as a payment option. You'll find tools for your practice, team and patients [here](#).

#### Efficiently Verify And Optimize Available Benefits Coverage

- Leverage tools such as the ones listed below to efficiently verify your patients' routine vision plan and medical insurance benefits.
  - ABB Verify has a proven track record of identifying vision plan benefits that many patients don't realize they have, such as dual benefits under separate plans, increasing access to a second pair of eyewear. Proven data has demonstrated up to a 20X ROI using this tool. HEA members who sign up by May 30 pay no implementation fee and receive the first month free. Call ABB Verify at: 855.589.7913 or email: [abbsolutions@abboptical.com](mailto:abbsolutions@abboptical.com) for details. [Click here](#) to schedule a demo.
  - Leverage one of HEA's newest partners, Optometric Medical Solutions. OMS's Insurance Verification & Eligibility System (IVES) is a web-based solution that facilitates the verification of your patients' medical insurance benefits, increasing accuracy and utilization of benefits, all while freeing up your staff's time. Learn more at [optmedsol.com](http://optmedsol.com).





### Physical Space

#### Determine Waiting Room And Optical Modifications

- ☐ Evaluate and rearrange your waiting room and optical. Even if social distancing is no longer mandated, maintaining physical distancing between patients is expected to be the norm for the foreseeable future.
- Space your waiting room chairs appropriately.
- Use frame towers and/or potted plants in between chairs to eliminate odd spaces and increase visibility of your frame lines.
- Separate your optical desks or stations as much as possible.
- Post signs encouraging maintaining appropriate distance.
- Consider an area in your optical for dispensing only and another for styling/purchasing to limit patient cross traffic in the office.
- Place bins at each optical station and any other strategic points for patients to place frames after use for sanitizing prior to returning them to the frame board.



#### Provide Visual Cues For Office Flow

- ☐ Add tape lines and/or other visual cues to promote office flow that limits cross traffic.

#### Establish And Communicate Wait Time Protocol

- ☐ Consider having patients wait in their car or other location outside the office suite and use your patient engagement solution to text them when it's time to come in.

#### Limit Credit Card Handling

- ☐ Evaluate your credit card payment procedure.
- If you typically take credit cards behind the desk, move your terminal externally to allow patients to insert their own card.
- Consider covering the terminal in plastic to make cleaning easier.
- If you don't offer contactless pay (e.g., Tap To Pay, Apple Pay, Google Pay), contact your bank/merchant service company to consider adding this feature. This should be the preferred method of payment for all patients when possible.



### Staff

#### Communicate With Your Staff

- Connect again with your team to build enthusiasm for the reopening process.

#### Identify Team Needs

- Be sure to consider which members of the team may need special accommodations due to schools being closed, any concerns surrounding high-risk individuals in the household, and other special considerations.

#### Extend Work From Home Where Possible

- Consider which team members, if any, may be able to continue working from home as you reopen. While the team will no doubt be eager for the office to reopen, now is the time to consider any special arrangements that may be necessary to ensure that all areas of your business are covered.

#### Schedule First Team Meeting

- Schedule the first team meeting to be held next week and build your meeting agenda. The first meeting should focus on reconnecting with your team and casting the vision of your recovery. *See the following page for a suggested meeting template.*



### Staff

#### Sample Team Meeting Template #1 | 30-45 minutes

The focus of this first team meeting will be to reconnect the team.

##### 1. Reconnect

- Allow your team the first 5-10 minutes (or more as needed) to reconnect with each other.
- Ask each team member the biggest positive they encountered during their time off (e.g., reconnecting with friends/family members via video conference, house projects, books read).
- Ask each team member to share the biggest challenge they faced during their time away from the office.

##### 2. Promote Trust Among The Team

- Acknowledge the challenge that reopening will present. Feel free to share one concern you have for reopening, while being thoughtful about your comments. You want to promote trust and honesty among your team without instilling fear.
- Ask each team member to share their biggest concern for reopening. Acknowledge and recognize the validity of each concern.
- Reassure the team you have devised a comprehensive sanitation and safety protocol to protect them and each patient they care for. Let them know you will be reviewing the protocol and walking through each step together as a team during the next team meeting prior to reopening.

##### 3. Cast The Vision For Recovery

- Remind the team of the practice's vision: why the practice exists and why providing the best eye care and patient experience is vital to the bigger picture.
- Why is reopening and recovery so important for the patients you serve?
- Why is reopening and recovery important for your community and other healthcare providers?

##### 4. Highlight Next Steps

- Next team meeting date
- Topics to cover
  1. Sanitation protocol
  2. Staff scheduling
  3. Patient scheduling
  4. Practice goals

### Patients

#### Begin Scheduling And Setting Patient Expectations

- Begin scheduling patients per your plan established last week, being sure to educate patients on those safety measures they need to be aware of before they walk through the door (this is especially true if you will be using a system that calls for patients to wait in their cars or otherwise outside the office until you are ready for them).



#### Prioritize Highest Impact Patients

- Immediate cash flow is essential for recovery, so when possible, try to fill your reduced schedule with the highest impact patients. Focus on scheduling comprehensive exams and out-of-pocket medical services for the first 1-2 weeks.

#### Update Insurance Information

- Keep in mind the current economic environment and update all insurance information ahead of the appointment.
  - A number of your patients may have lost their insurance. Others may be relying on their benefits more strongly than ever due to a need to limit personal spending.
  - Use secure messaging to capture insurance information and insurance card images to limit handling.

#### Clearly Communicate Who May Attend Appointments

- Be clear as to who may or may not attend the appointment. Limit family members to one guardian or advocate only and no siblings unless also scheduled for an exam.



### Vendors

#### Optimize Every Dollar Spent

- ☐ Ensure that every minute and every dollar is spent in a way that will help your practice power back up.
  - Take the time to assess the vendors you work with and ensure you are optimizing your cost of goods sold. Consider steps to streamline your operations to make point-of-sale easier.
  - In the recovery phase, how you invest your time will be just as important as how you spend your money because reopening will occur in the middle of a severe financial downturn, necessitating an especially strategic approach to every decision you make.
    1. Consolidate as many vendors as possible under your HEA membership to make statement reconciliation less time consuming and ensure you're getting the best discounts on your goods.
    2. If you have not yet had your annual **HEA Business Review**, schedule one today by calling our Solutions Specialist team at **800.959.2020, Option 3**.



#### Review Contact Lens Trials

- ☐ Review your contact lens trials. Make sure your fitting sets are full. Minimize the need for additional trial ordering or contact lens patients returning to the office as much as possible.

### Coming Next Week!

#### Three To Four Days From Reopening

As each day passes, it's ever more important to build the momentum for a successful reopening. Be sure to download next week's checklist, focusing on the three to four days prior to reopening. This checklist will give you tools to further expand your emergency/urgent care referrals, communicate the importance of comprehensive vision care despite COVID-19 effectively to your patients, schedule your staff appropriately, and lead your scheduled team meetings. As always, you won't want to miss it!

*The information and opinions contained herein are not intended to serve as the sole source of information or professional advice with respect to the material presented. Healthy Eyes Advantage encourages you to also consult with your state and local governments, as well as eye care professional organizations, for additional guidance.*

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