

COPING WITH COVID-19
MAY 18TH, 2020 WEBINAR
HOSTED BY CINDY PEZZA,
PMAC
PINNACLE PRACTICE
ACHIEVEMENT
WWW.PINNACLEPA.COM






*Welcome to week 10 of our
Coping with COVID-19
Discussions*



Information is changing rapidly so we all must take personal responsibility and stay informed (i.e. Don't shoot the messenger!)



The worry and discussion continues about HHS Stimulus funds

**Article from PM News Online*

HHS Stimulus: Practices May Not be Eligible to Retain Funds- Part 5

Another very important consideration is whether a physician practice that accepts payment will be able to satisfy the record-keeping requirements. All relief fund recipients must maintain appropriate records and cost documentation, which must be submitted upon request to HHS. Providers must also agree to cooperate with audits to assure their compliance with the Terms and Conditions. I think we can assume that the Office of Inspector General will be looking carefully over the next couple of years at exactly how these relief funds were used by healthcare providers. We can also be certain they will seek repayment of any funds which were wrongly retained or used.

Funds retained improperly will also likely be considered a claim under the False Claims Act, which penalizes anyone who “knowingly presented or caused to be presented a false claim for payment to the government” and is subject to treble damages. Additionally, the False Claims Act prohibits “reverse false claims,” which occurs when a provider retains money that should have been returned to the government. For these reasons, extra caution should be used by physician practices when assessing their rights and obligations as it relates to retaining the relief funds.



<https://data.cdc.gov/Administrative/HHS-Provider-Relief-Fund/kh8y-3es6>

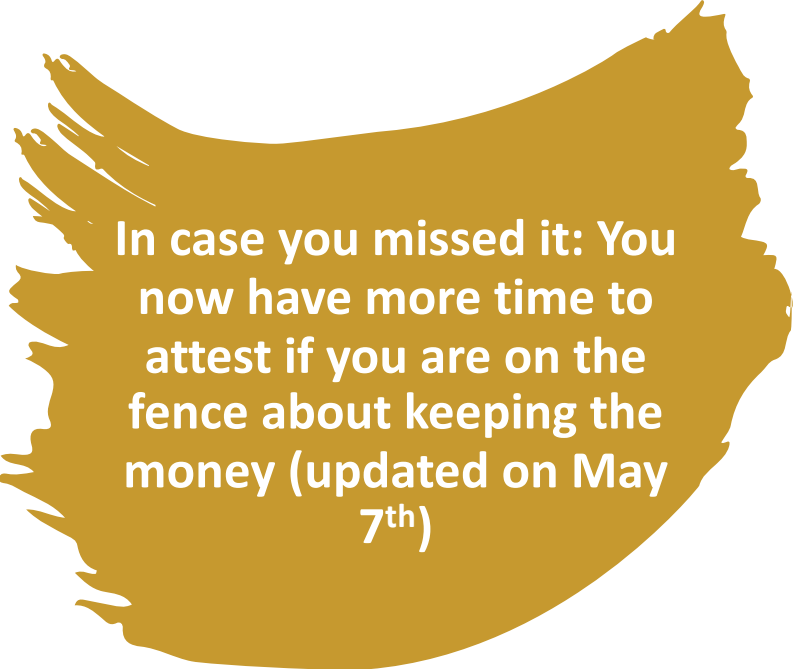
- HHS Provider Relief Fund
- The bipartisan CARES Act and the Paycheck Protection Program and Health Care Enhancement Act provided \$175 billion in relief funds to hospitals and other healthcare providers on the front lines of the coronavirus response. Payments from the \$50 billion general distribution, the \$12 billion targeted allocation to high impact areas, and the \$10 billion targeted allocation to rural providers are being distributed by the Department of Health and Human Services through the Health Resources and Services Administration. This dataset represents the list of providers that received a payment from the General Distribution, High Impact Targeted Allocation and/or the Rural Targeted Allocation of the Provider Relief Fund and who have attested to receiving one or more payments and agreed to the Terms and Conditions as of May 13, 2020.

*179,305
providers have
attested as of
5/13/20*

Table Preview [View Data](#) [Create Visualization](#)

Provider Name	State	City	Payment
Eastern Aleutian Tribes, Inc.	AK	ADAK	\$ 2,538
Elizabeth Watney	AK	ANCHOR POINT	\$ 724
A Joint Effort Physical Therapy Inc	AK	ANCHORAGE	\$ 5,953
Aa Pain Clinic, Inc.	AK	ANCHORAGE	\$ 69,976
Adl Inc	AK	ANCHORAGE	\$ 33,655
Advance Chiropractic Clinic P.C.	AK	ANCHORAGE	\$ 2,813
Alaska Cardiothoracic Surgery Pc	AK	ANCHORAGE	\$ 8,781
Alaska Center For Pain Relief Inc	AK	ANCHORAGE	\$ 27,497
Alaska Childrens Eye And Strabismus Llc	AK	ANCHORAGE	\$ 10,823
Alaska Digestive Center Llc	AK	ANCHORAGE	\$ 50,053
Alaska Emergency Medicine Associates	AK	ANCHORAGE	\$ 217,156
Alaska Eye Surgery And Laser Center, Inc.	AK	ANCHORAGE	\$ 39,435
Alaska Family Care Associates, Llc	AK	ANCHORAGE	\$ 9,561
Alaska Family Dermatology Llc	AK	ANCHORAGE	\$ 1,862

< Previous [Next](#) > Showing Providers 1-14 out of 179,305



In case you missed it: You now have more time to attest if you are on the fence about keeping the money (updated on May 7th)

- The Department of Health and Human Services has extended the deadline for healthcare providers to attest to receipt of payments from the Provider Relief Fund and accept the [Terms and Conditions](#). Providers will now have 45 days, increased from 30 days, from the date they receive a payment to attest and accept the Terms and Conditions or return the funds. As an example, the initial 30-day deadline for providers who received payment on April 10, 2020, is extended to May 24 from May 9, 2020. With the extension, not returning the payment within 45 days of receipt of payment will be viewed as acceptance of the Terms and Conditions.

Are you second guessing keeping the “free” money? This is what attorneys and accountants are saying to those concerned about the right to retain funds.



Work with legal and financial counsel to set up a tracking system and a process to confirm that all use of relief funds is legitimate.



HHS relief funds may not be used for the same purpose that a practice may receive other funds, such as through the Paycheck Protection Program (PPP) loan. This overlap must be carefully avoided. If a practice’s expenses have been covered by a PPP loan, there should be serious thought given to returning the HHS funds. **



There are certain compliance policies that must be developed as described in the Terms and Conditions. Work with legal counsel to make sure these policies are developed and retained.

Go right to the source and see
what you think:
hhs.gov/providerrelief.com

President Trump is providing support to healthcare providers fighting the COVID-19 pandemic through the bipartisan CARES Act and Paycheck Protection Program and Health Care Enhancement Act which provide \$175 billion in relief funds to hospitals and other healthcare providers on the front lines of the coronavirus response. This funding will be used to support healthcare-related expenses or lost revenue attributable to COVID-19 and to ensure uninsured Americans can get treatment for COVID-19.

In allocating the funds, the Administration is working to address both the economic harm across the entire healthcare system due to the stoppage of elective procedures and addressing the economic impact on providers particularly impacted by COVID-19, and to do so as quickly and transparently as possible.



My opinion

Be diligent in your record keeping in general (but especially when it comes to tracking expenditures of government grants and loans).

Use your common sense; Don't makeover your kitchen with the funds.

We have yet to see clarification of "legitimate" use of funds so keep watching. . .

The second round of HHS funds started to arrive

Cindy Pezza Admin · May 14 at 10:09 AM

Has anyone received their HHS round 2 stimulus money (the one you had to apply for)?

1 Like 32 Comments

Like Comment

Kristina Nicole We haven't
Like · Reply · 3d

Mitchell Barber Negative ghost rider (gut tells me you will get the reference.)
Like · Reply · 3d

Lance Hardison Applied. No deposit or response/communication
Like · Reply · 3d

Luke J. Hunter Negatory
Like · Reply · 3d

Erin Palmer No
Like · Reply · 3d

Cindy Pezza Admin Hmmm... that's what I thought. I'm usually first on the list to email or text when one of my docs receives "free" money so I'll keep you posted...

Like · Reply · 3d

Sara Karamloo Nope
Like · Reply · 3d

Cindy Pezza Admin · May 15 at 4:49 PM

If you think the HHS stimulus round 2 is like Santa then you are mistaken... my first doctor texted to say he received it today!

1 Like 😄 Kristina Nicole, Scott M. Aronson and 5 others 9 Comments

Like Comment

Shelly Sedberry I got mine today
Like · Reply · 2d

Luke J. Hunter Jealous!
Is it 2/3 proportional to the first stimulus payment? #cantwait
Like · Reply · 2d

Kelly Nicole Luke J. Hunter I got mine. It was a lot less
Like · Reply · 2d

Cindy Pezza Admin Luke J. Hunter it's government math so...
Like · Reply · 1d

View 1 more reply

Cindy Pezza Admin All of the second HHS stimulus payments (grants) will be less than the first (but at least it's something).
Like · Reply · 1d

Jordan Steinberg Got it today. Barely anything compared to first payment
Like · Reply · 1d

Darlo Vander Wilt My payment was substantial. I will have to think on how to spend it all according to the guidelines

A close-up, shallow depth-of-field photograph of a computer keyboard. The focus is on a few keys in the center, including one with a white 'X' and another with a white vertical line. A white, torn-edge callout box is overlaid on the right side of the image, containing text.

Any updates on tax deductions on PPP expenses?

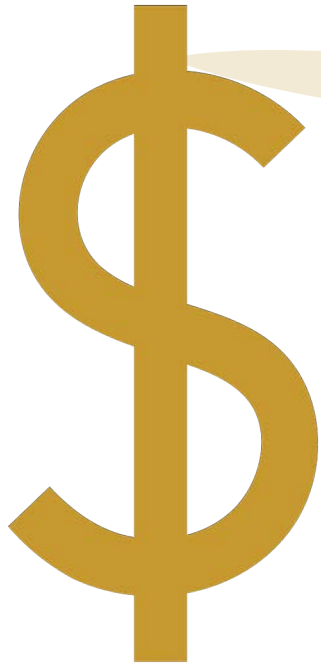
- It is still possible that Congress may pass a narrow amendment to Section 265 of the Code to specifically permit a deduction and double dip (based on loans provided being "Tax free", but for now, no deduction is allowed).

Loan forgiveness applications have been released

- The application is sort of like that Game show “Who wants to be a millionaire”
- Your name, address and EIN, as well as SBA PPP loan number and lender PPP loan number.

Next fill in your PPP Loan Amount

- This will serve as the maximum amount of loan eligible for forgiveness, as the application seems to stick to the CARES Act – and deviate from a previous Interim Final Rule – by limiting forgiveness to the principal of the loan, rather than any accrued but unpaid interest.



Followed by your PPP Loan Disbursement Date

- The date you receive the funds will generally signal the start of your 8-week period to accumulate expenses eligible for forgiveness, but as we'll see, there is 1) some flexibility in choosing the 8-week period specific to payroll costs, and 2) certain situations where expenses paid AFTER the expiration of the 8-week period will be eligible for forgiveness.

Next: Employees at Time of Loan Application



According to Forbes.com, "While this doesn't appear to have any specific application to determining forgiveness, we will see that since you're going to have to provide your number of employees for approximately 372 other periods, it can't hurt to provide that detail for the date of the loan application as well."



It is also asks for *Employees at Time of Forgiveness Application*: Same response as immediately above.

Economic Injury Disaster Loan Advance Amount



These amounts were generally capped at \$10,000, though later borrowers were often limited to \$1,000 per employee, not to exceed a total of \$10,000.



When you arrive at Line 11 of the application – the maximum forgiveness amount – the SBA will reduce the amount forgiven by any EIDL advance that was received.*

Economic Injury Disaster Loan Application Number




Any EIDL taken out after January 31, 2020, and used to cover payroll, was likely refinanced into your PPP loan. As a result, the SBA is looking to gather than information here.



Some had this automatically deducted from the approved PPP loan amount while others will have to give it back, maybe. . .

- You must select the box that corresponds with your regular payroll schedule. This will help the SBA determine when payroll costs are paid or incurred and thus eligible for forgiveness. It will also drive the computation of full-time equivalent employees for several key periods, which will in turn be used to determine if a reduction in the amount eligible for forgiveness is required.

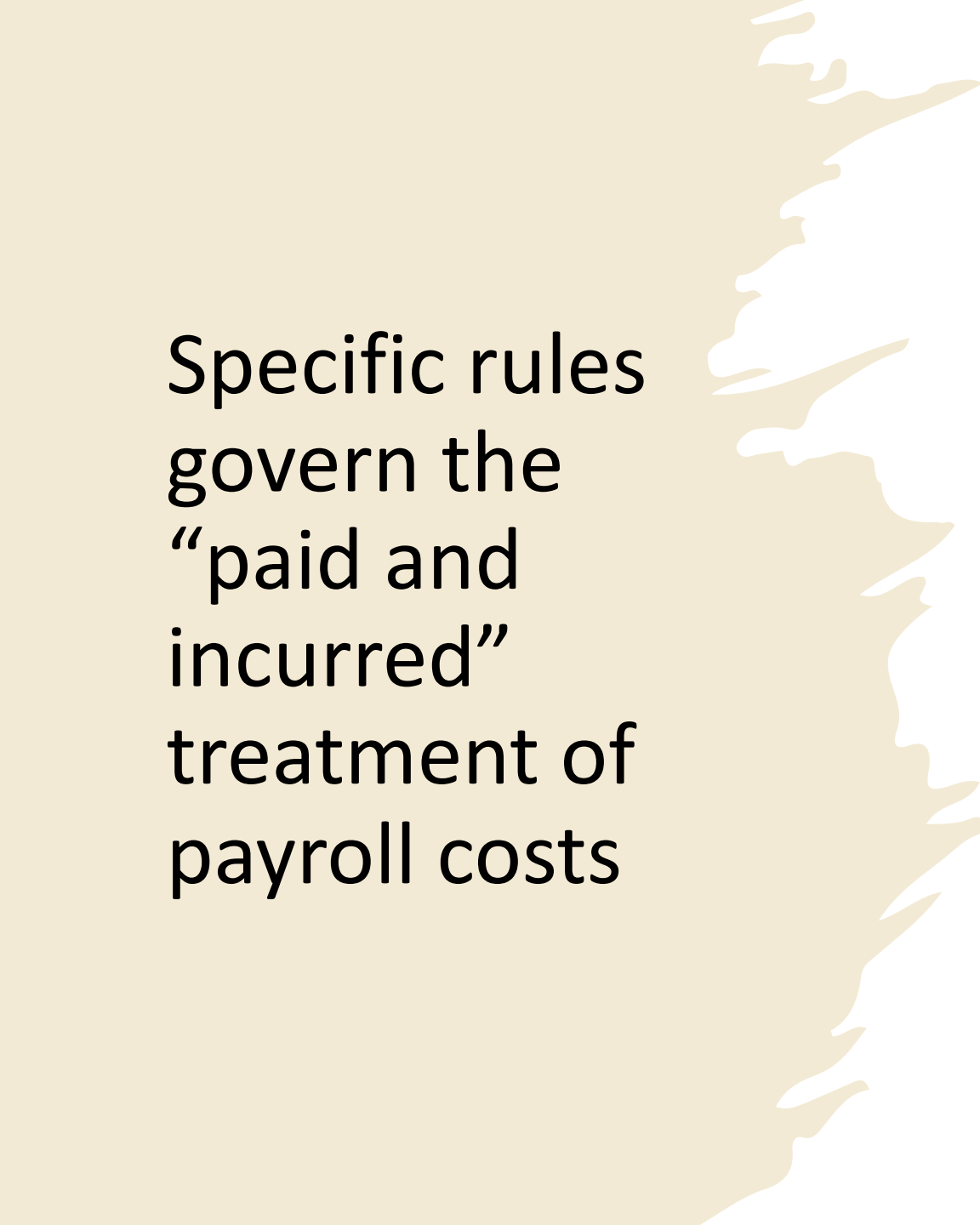


Payroll Schedule

Covered Period

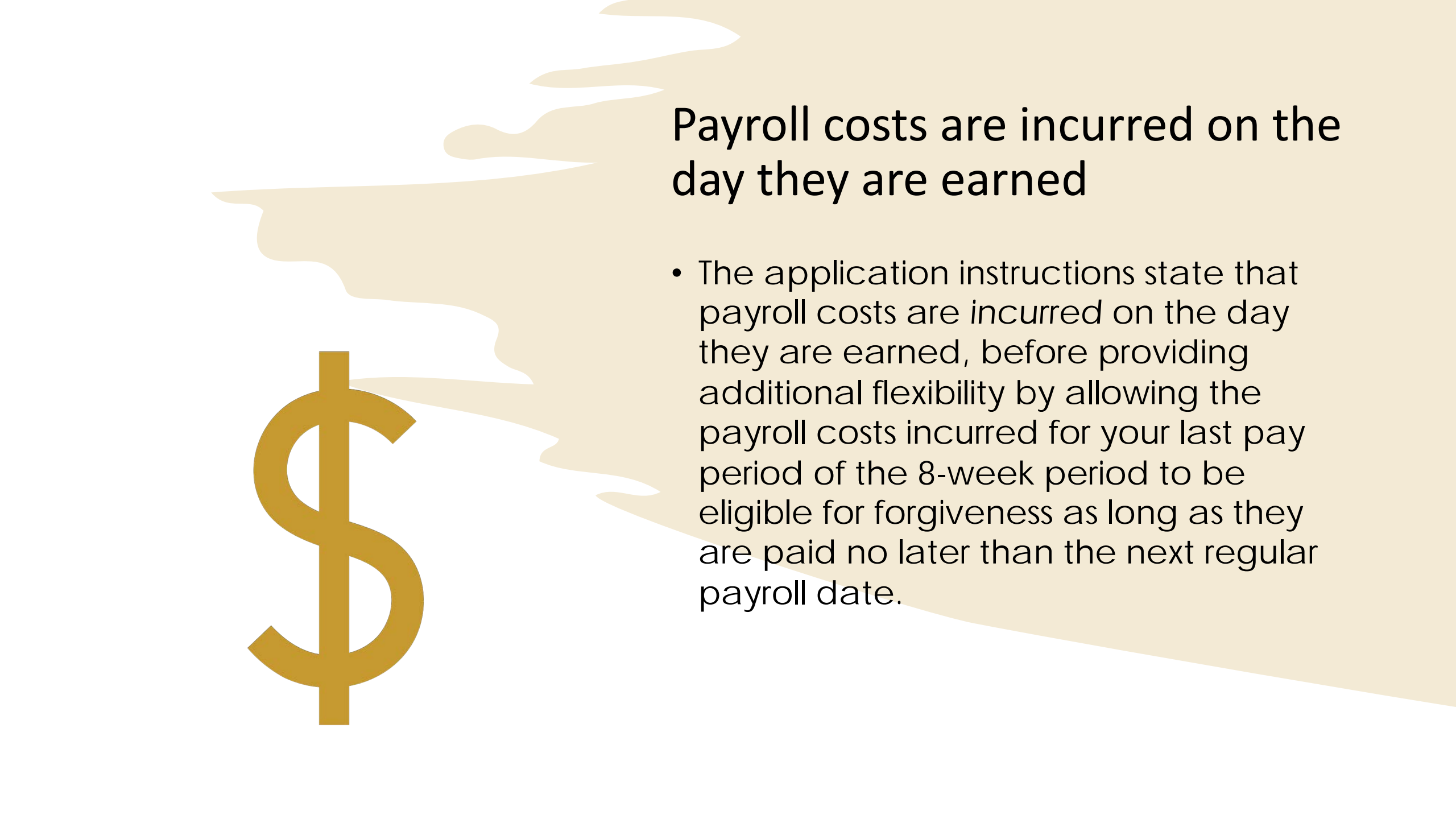
This is the first critical piece of information. The “covered period” is the 8-week period generally beginning on the date you received the loan disbursement. Only the costs paid OR incurred within the 8-week period are generally eligible for forgiveness.

HOWEVER, whereby certain costs are eligible for forgiveness even though they were incurred BEFORE the covered period but paid DURING the period, while other costs may be eligible for forgiveness even though they were incurred DURING the covered period but paid AFTER the period.



Specific rules govern the “paid and incurred” treatment of payroll costs

- Payroll costs are paid on the day the paychecks are distributed or the borrower originates an ACH credit transaction. Thus, you could presumably receive PPP loans on April 26 and immediately pay – as part of your regular payroll process – wages that had been earned by the employees for the previous two weeks, and include the amounts in the forgiveness calculation because the amounts had been PAID within the covered period.
- What is not clear is how far in arrears you may pay wages with PPP funds and continue to count those wages towards forgiveness. If you had not yet paid your employees for March wages but did so immediately after receiving PPP funds in April, are those amounts eligible for forgiveness? Nothing appears to prevent such a result at this moment in time*



Payroll costs are incurred on the day they are earned

- The application instructions state that payroll costs are *incurred* on the day they are earned, before providing additional flexibility by allowing the payroll costs incurred for your last pay period of the 8-week period to be eligible for forgiveness as long as they are paid no later than the next regular payroll date.



Non-payroll costs

For non-payroll costs such as mortgage interest, rent and utilities, to qualify for forgiveness, these expenses must either be: 1) paid DURING the 8-week covered period, or 2) incurred during the 8-week period, and paid by its next regular due date, even if that due date is outside the 8-week period.



Once again, it would appear that by allowing all payments made DURING the period to be eligible for forgiveness, borrowers are permitted to pay rent, interest, or utilities related to periods prior to the 8-week period and have those expenses forgiven.



Alternative Payroll Covered Period, if applicable

- The instructions to the application allow for as-yet-unseen flexibility in choosing your 8-week covered period *specific to payroll costs*. You are permitted to choose an “alternative payroll covered period,” which is the 8-week (56 day) period beginning on the first day of the first pay period *following the disbursement date*, allowing a business to neatly align its covered period with the beginning of a pay period. Thus, if you received your PPP loan on April 20, 2020, and the first day of your next pay period is April 26, 2020, you may elect to count the payroll costs — and only the payroll costs — for the 8-week period beginning April 26, 2020, rather than the 8-week period beginning April 20, 2020.


**Next: If you
received PPP
loans in excess
of \$2 million,
check the box. . .
i.e. DON'T
CHECK THE BOX!**

- The SBA recently announced what is effectively – and perhaps literally — a get-out-of-jail free card by providing a safe harbor for those borrowers who received less than \$2 million in PPP funds. These borrowers will be treated as having made the required certification that the loan was necessary in good faith, and thus won't be subject to the same additional scrutiny from the SBA that borrowers of loan amounts in excess of \$2 million will face.

Now that you've entered your information, it's time to move on Line 1 of the Actual Application

- Line 1: Payroll Costs (Enter the amount from PPP Schedule A, Line 10).
- Line 1 directs you to Line 10 of Schedule A (which can't be computed until you've determined items on the Worksheet for Schedule A). As a result, it's best to start with the Worksheet for Schedule A, and then build your way back up to the application.

*The worksheet to
Schedule A looks
like this*



**Paycheck Protection Program
Loan Forgiveness Application**

PPP Schedule A Worksheet

OMB Control Number 3245-0407
Expiration Date: 10/31/2020

Table 1: List employees who:

- Were employed by the Borrower at any point during the Covered Period or the Alternative Payroll Covered Period whose principal place of residence is in the United States; and
- Received compensation from the Borrower at an annualized rate of less than or equal to \$100,000 for all pay periods in 2019 or were not employed by the Borrower at any point in 2019.

Employee's Name	Employee Identifier	Cash Compensation	Average FTE	Salary / Hourly Wage Reduction
FTE Reduction Exceptions:				
Totals:		Box 1	Box 2	Box 3

Table 2: List employees who:

- Were employed by the Borrower at any point during the Covered Period or the Alternative Payroll Covered Period whose principal place of residence is in the United States; and
- Received compensation from the Borrower at an annualized rate of more than \$100,000 for any pay period in 2019.

Employee's Name	Employee Identifier	Cash Compensation	Average FTE
Totals:		Box 4	Box 5

Attach additional tables if additional rows are needed.

FTE Reduction Safe Harbor:

- Step 1. Enter the borrower's total average FTE between February 15, 2020 and April 26, 2020. Follow the same method that was used to calculate Average FTE in the PPP Schedule A Worksheet Tables. Sum across all employees and enter: _____.
- Step 2. Enter the borrower's total FTE in the Borrower's pay period inclusive of February 15, 2020. Follow the same method that was used in step 1: _____.
- Step 3. If the entry for step 2 is greater than step 1, proceed to step 4. Otherwise, the FTE Reduction Safe Harbor is not applicable and the Borrower must complete line 13 of PPP Schedule A by dividing line 12 by line 11 of that schedule.
- Step 4. Enter the borrower's total FTE as of June 30, 2020: _____.
- Step 5. If the entry for step 4 is greater than or equal to step 2, enter 1.0 on line 13 of PPP Schedule A; the FTE Reduction Safe Harbor has been satisfied. Otherwise, the FTE Reduction Safe Harbor does not apply and the Borrower must complete line 13 of PPP Schedule A by dividing line 12 by line 11 of that schedule.

SBA Form 3508 (05/20)
Page 9

On the worksheet you will compute eligible compensation for each employee (Making sure to cap the compensation of employees at \$100,000 on an annualized basis)

- First determine the number of full-time equivalent employees (FTEs) for the covered period (or alternative payroll period, if elected), and then use the FTEs to determine if a reduction in the amount eligible for forgiveness is required because FTEs were reduced during the covered period.

Begin by identifying each employee, but do NOT include:



INDEPENDENT
CONTRACTORS



OWNER-
EMPLOYEES



SELF-EMPLOYED
INDIVIDUALS



PARTNERS



Table 1; Cash Compensation

The CARES Act stated that the amounts spent on “payroll costs” during the 8-week covered period are eligible for forgiveness. Included in payroll costs are the sum of payments of any compensation with respect to employees that is a:

- Salary, wage, commission, or similar compensation
- Payment of cash tip or equivalent
- Payment for vacation, parental, family, medical, or sick leave OR
- Allowance for dismissal or separation.

Calculating/determining the average FTE employees for the 8-week covered period (or, if elected, the alternative payroll covered period)



For each qualifying employee, determine the average number of hours worked per week and divide by 40, before rounding to the nearest tenth.



The maximum amount for each employee is 1.0.



Or, you can skip the math and use 1.0 for every employee who worked 40 hours per week and 0.5 for every employee who didn't meet that standard.

- The reduction in forgiveness amount is required if the reduction in wages over the 8-week period is in excess of 25% of the total salary or wages of the employee during the period from January 1, 2020 through March 31, 2020.



Reduction in
forgiveness

To determine the amount of reduction required, you must go through the following steps for EACH employee:

- Step 1: Determine the average annual salary or hourly wage for each employee during the covered period (or alternative payroll period, if elected).
- Step 2: Determine the average annual salary or hourly wage for each employee during the period from January 1, 2020, through March 31, 2020.
- Step 3: Divide Step 1 by Step 2.
- Step 4: If Step 3 is greater than 75%, no reduction is required. Do not fill out the column in Table 1 for this employee.
- Step 5: If Step 3 is LESS than 75%, a reduction is required, but as we'll see shortly, the reduction may be reinstated. The reduction is tentatively determined by multiplying the amount determined in Step 2 by 75%, and then subtracting from that result the amount from Step 1. For a salaried employee, take this result and multiply it by 8. Then divide the amount by 52. This is the amount of the required reduction.



Confused yet?

- For an hourly worker, the amount of the reduction is determined by first multiplying the average number of hours worked per week from January 1, 2020, through March 31, 2020, by the amount determined by subtracting the amount determined in Step 1 from 75% of the amount determined in Step 2. The result is then multiplied by 8 to arrive at the total reduction in forgiveness.


Establishing
whether the safe
harbor is met is
determined via
the following
steps:

- Step 1: Determine the employee's annual salary or hourly wage as of February 15, 2020.
- Step 2: Determine the average annual salary or hourly wage for the period from February 15, 2020 through April 26, 2020.
- Step 3: If Step 2 is greater than Step 1, the safe harbor does not apply. Compute the reduction in forgiveness as determined in Step 5, above. If Step 2 is less than Step 1, proceed to Step 4.
- Step 4: Determine the average annual salary or hourly wage for the employee as of June 30, 2020. If that amount is equal to or greater than Step 1, the safe harbor has been met. In other words, the SBA will ignore a reduction in salary during the covered period relative to the 1st quarter of 2020, but ONLY IF that salary is restored to what it was on February 15, 2020, by June 30, 2020.



Math is not my
strong suit but. . .

- According to my accountant who spends his days researching the ins and out of PPP forgiveness and assisting clients with collection and calculation of data. . . “If the numbers aren’t adding up for me, how do they expect everyone else to do this?”



What is my lender contact saying?

- WAIT to complete your forgiveness application as it will become less and less complicated with each version (yes, like every other loan or grant associated with the CARES Act there will be significant revisions in order to simplify the process and to accommodate for “adjustments” in guidelines.

Interesting facts about smaller lenders who participated in PPP loans



If you worked with a smaller community bank or credit union to obtain your PPP loan and it was a slow process to underwrite, close and fund (not that larger lenders weren't slow as well) . . . This may have been the reason:



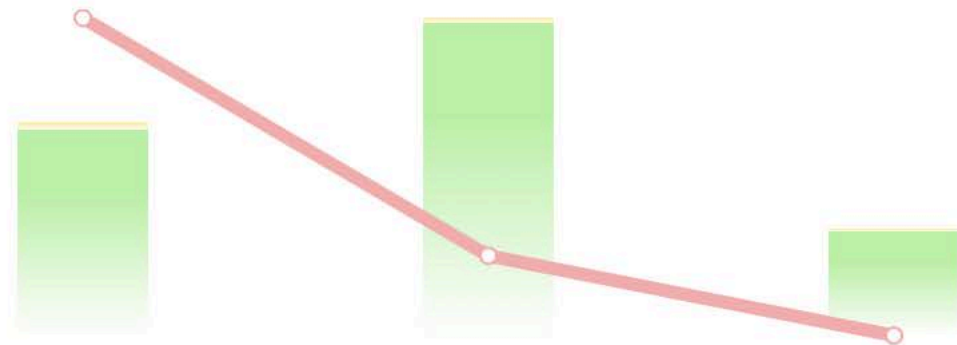
Since smaller banks don't have the funding in house to meet the needs of a program like the PPP, they had to draw on their own lines of credit from SBA (at a rate of 3.25%)

In vetting and approving recipients for PPP, smaller lenders were hoping 1 of 2 things would happen:

- You would meet the standards and be 100% forgiven so they could stop losing money
- You would default on the loan completely (\$250K); out of business, etc.

\$10,525.52 Monthly Payment
\$252,612 Total of 24 Payments

\$2,612 Total Interest Paid
Apr, 2022 Pay-off Date



Takeaway



Don't get too overwhelmed about completing the application for forgiveness just yet. . . Give it a little time and wait for the Cliffsnote version.



The only constant in this situation is change.



Lenders have 6 months post receipt of application to forgive the loan (or calculate the amount that is not forgiven).

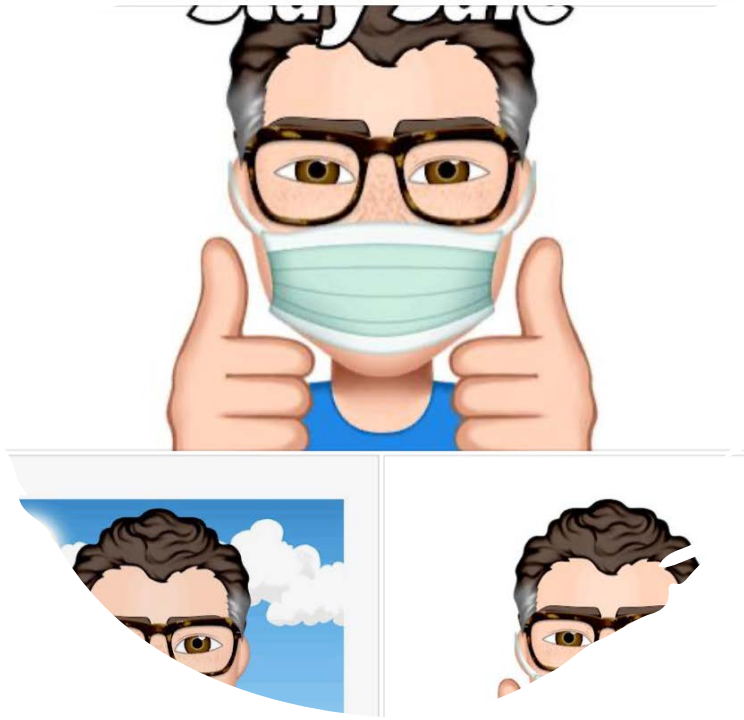
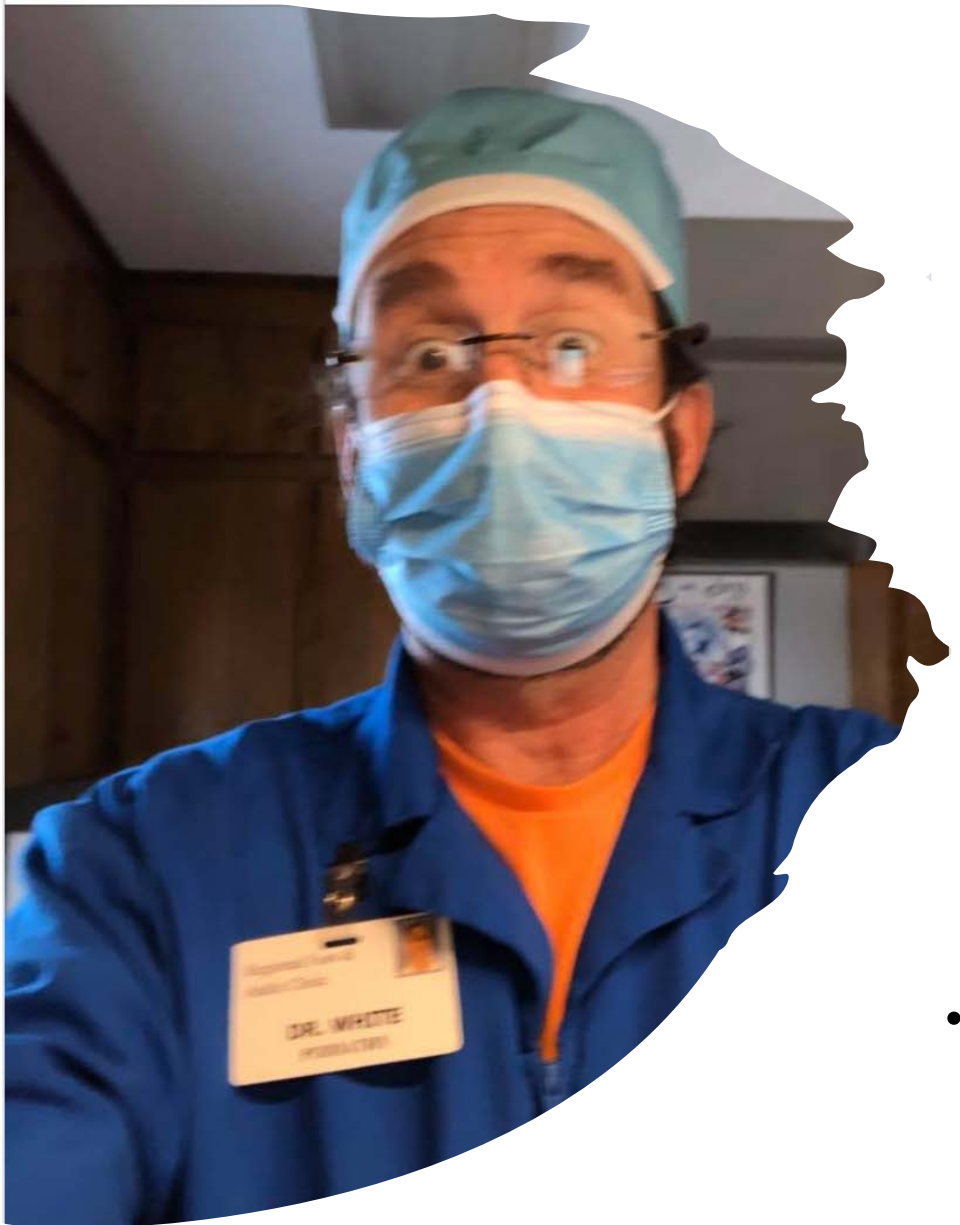
Just when you forgot
you ever applied. . .

More and more docs
are just hearing about
the status of their
EIDL loan applications.

Q: What if I just received my EIDL loan and I already have a PPP?

A: That's okay but you cannot use them for the same purpose.

- What are the terms of the EIDL?
 - Low fixed interest rates: 3.75% or 2.75% for non-profits
 - Long-term repayment of up to 30 years
 - No prepayment penalties
 - Payments deferred (interest accrues)
 - EIDLs are working capital loans that may be used to pay fixed debts, payroll*, accounts payable, and other bills that could have been paid had the disaster not occurred. *The loans are not intended to replace lost sales or profits or for expansion. (*but NO double dipping)*
 - *Funds cannot be used to refinance long-term debt (read the fine print)

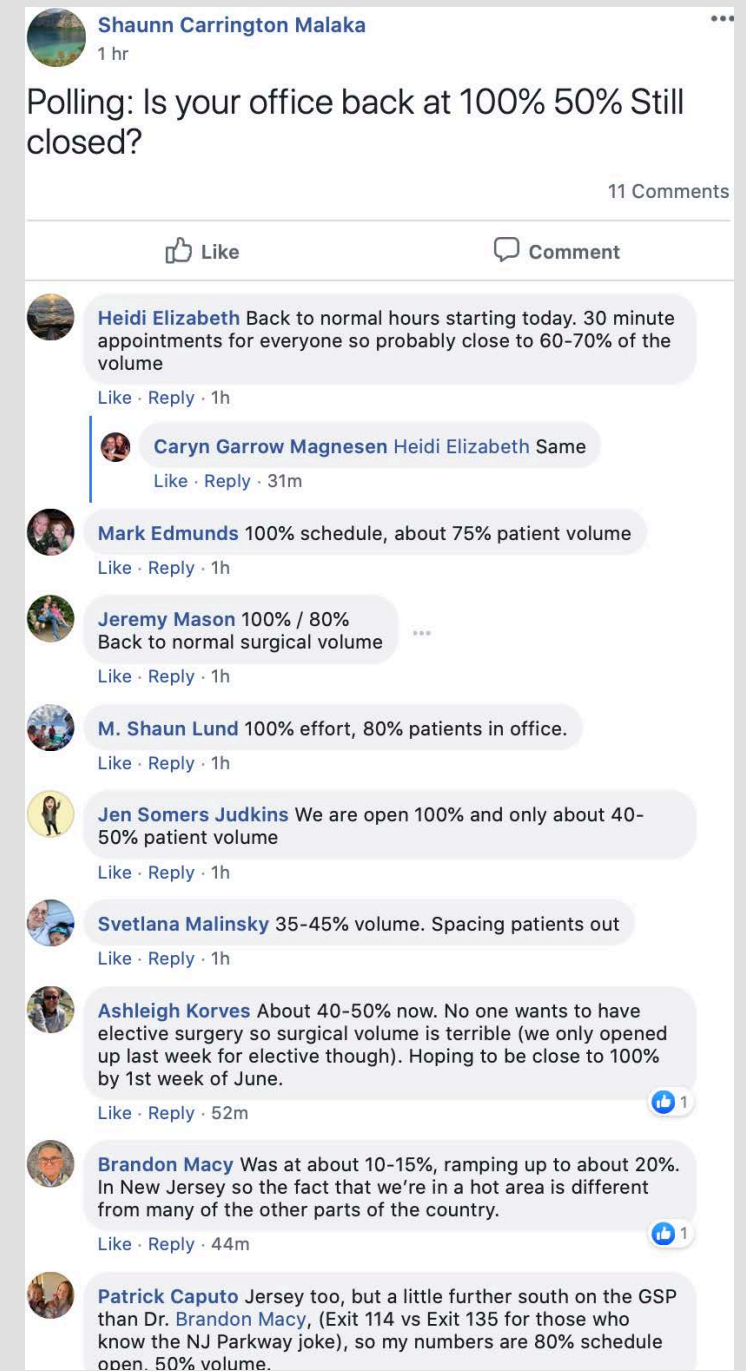


Center, PLLC
10:52 AM · 🌐
...ents in this Era takes a lot of effort and
...y looks 😬 getting ready to do an #ingrownail
...rixectomy with my one and only #m... See More



- Defining the new normal and getting back into the swing of things...

Phase one has begun in many areas and is just now beginning for some (it's so helpful to know what others are experiencing but don't let it get you down)

A screenshot of a Facebook poll titled "Polling: Is your office back at 100% 50% Still closed?". The poll was created by Shaunn Carrington Malaka 1 hour ago and has 11 comments. The comments are as follows:


- Heidi Elizabeth**: Back to normal hours starting today. 30 minute appointments for everyone so probably close to 60-70% of the volume. (1h)
- Caryn Garrow Magnesen** **Heidi Elizabeth** Same. (31m)
- Mark Edmunds**: 100% schedule, about 75% patient volume. (1h)
- Jeremy Mason**: 100% / 80% Back to normal surgical volume. (1h)
- M. Shaun Lund**: 100% effort, 80% patients in office. (1h)
- Jen Somers Judkins**: We are open 100% and only about 40-50% patient volume. (1h)
- Svetlana Malinsky**: 35-45% volume. Spacing patients out. (1h)
- Ashleigh Korves**: About 40-50% now. No one wants to have elective surgery so surgical volume is terrible (we only opened up last week for elective though). Hoping to be close to 100% by 1st week of June. (52m)
- Brandon Macy**: Was at about 10-15%, ramping up to about 20%. In New Jersey so the fact that we're in a hot area is different from many of the other parts of the country. (44m)
- Patrick Caputo**: Jersey too, but a little further south on the GSP than Dr. Brandon Macy, (Exit 114 vs Exit 135 for those who know the NJ Parkway joke), so my numbers are 80% schedule open. 50% volume.

increase patient volume in the office...this is what we have to look forward to, welcome back 😊

Are you slowly getting caught up with patients who are way past due for routine care?

- Schedule them some extra time, you may need it!
- Now is the time to “look past the nail groove”





*As we have been
saying for the past
10 weeks, Make
plans and re-
evaluate weekly*

THE OFFICE “NEW NORMAL”

- **MAKE A PLAN:** re-evaluate daily/weekly
- **OPEN INCREMENTALLY (GRADUAL)**
- **SIGNAGE:** Comply with governmental guidance (MA?) for entrances and exits. Many states are requiring signage at all doors. Plus, having safety signage can help patients and employees feel safer in your office/clinic
- **SCHEDULING** (decreased per hour): Modified, Be flexible for patients
- **PRE-REGISTRATION** (Tele-Triage): Phone call 2-3 days prior to appointment
- **PRE-SCREEN:** Ask for signs and/or symptoms of COVID-19 (day before appointment)
- **SCREENING:** Questions above (patient signs form), Temperatures performed
- **PAYMENTS:** Cash, Check or Charge
- **WAITING AREA:** *Limit non-patient visitors*. Remove all magazines, brochures, kids toys
- **FRONT DESK:** Germ Barriers
- **TREATMENT ROOMS:** Extra Hand Sanitizer (for patient use)
- **CHECK OUT:** Germ Barriers
- **ANCILLARY TESTS** (CT Scan, MRI, Ultrasound)
- **FOLLOW-UP APPOINTMENTS**
- **WHERE DOES TELEHEALTH FIT IN?**

Additional office suggestions:

1. Doors that can remain open...DO! (less to touch)
2. Patients may remain in the cars until a treatment room is ready for them
3. What if a patient arrives without a mask?
4. What if patient arrives with (unnecessary guest)?
5. “Use a pen, keep the pen”

WOW, it's really catching on. . .

The New Patient Coordinator (NPC)

This person (or individuals trained to perform the same function) serves as the primary liaison to the practice for new patients and referring physicians, working in conjunction with scheduling and clinical staff to improve efficiency and work-flow.

Scripts are
important (for
every staff
role)



"Mr. Green, we ask that you either complete and submit your intake paperwork ahead of time OR if you prefer, we can set up a pre-visit interview with our New Patient Coordinator. This allows us to keep wait times down and to limit contact with other patients and staff members.



If the patient chooses to complete paperwork on their own, an email is sent immediately following the call with portal log in instructions or a direct link to your website.



A very small % of practices have patients who log in to the portal and COMPLETE all required info

Insert practice logo here

Dear Patient,

Thank you for choosing _____ for your foot and ankle care needs. We look forward to meeting you and would like to review a few things prior to your appointment.

Information Processing:

Our New Patient Coordinator will attempt to contact you via phone to obtain your medical information and to confirm the reason for your visit on the Thursday prior to your appointment date between the hours of 9:00 a.m. – 11:00 a.m. If this time frame is not conducive to your schedule, please call our office and we will do our best to accommodate your needs. If for some reason, our New Patient Coordinator is not able to reach you, please take the time to complete your new patient paperwork, in its entirety, prior to your appointment date and time. This allows us to keep wait times down and to limit your contact with other patients and staff members throughout your visit. Again, we ask that you make every attempt to complete your intake paperwork or to speak with our New Patient Coordinator ahead of your visit. Otherwise, we reserve the right to reschedule your appointment for a later date.

Appointment Arrival:

In order to allow for proper sanitation between visits and to keep as few patients in the waiting area as possible, we ask that you arrive as close to your actual appointment time as possible. If you arrive and the door is locked, please wait in your vehicle, call the office and one of our staff members will let you know when we are ready for you.

Thank you for your understanding and patience during these unprecedented times. We are looking forward to serving your foot and ankle needs now and well into the future. If you have any further questions or concerns, please call our office at (____) ____-____.

Sincerely,

TEAM _____



Confirmation of reason for visit/chief complaint



Personal and family medical history



Medications and allergies



Vital Signs



Most MIPS measures (Height, Weight, Smoking Status, Immunizations, etc.)



Financial policy, HIPAA and consent to treat will need to be signed at the time of visit (if forms are not completed via the portal)

During the pre-visit interview, all remaining demographic and clinical information will be recorded directly into the patient's chart including:

Additional NPC Tasks



The NPC is responsible for following up/rescheduling missed new patient appointments and after 2 no-show incidences communicating with referring providers via professional communication (documenting the practice's efforts in coordinating care).



The NPC ensures that patient updates and consult visit notes are e-faxed to PCP/Referring providers within one week of new patient visits or procedures.



The NPC could perform insurance E & B checks. Information obtained will be discussed during the phone interview or in addition to the reminder communication (in order to inform and prepare patient for any monies that may be owed during visit).

A final thought. . . Now is the time to save on products or ancillary services you have been thinking about for “a while”

- Vendors are offering best possible pricing (ever) and long payment deferrals
- Others are offering direct ship to patients and additional discounts.
- So take advantage!

Dr. Jill's ^{happy feet} GELS
gel foot pads

Created & Designed by a Podiatrist

Gel Dancers Pads
(Sesamoid Pad)

- Designed to shift weight bearing away from the big toe joint
- Cut-out area surrounds the area under the big toe on the ball of the foot to re-distribute weight onto the pad and away from the ball of foot which relieves all stress and discomfort

2 Non-Medicated Re-usable Self Sticking Gel Cushions



Even on big ticket items!

Examples of 2 of my preferred vendors:

- Zimmer Medizin Systems (RSWT): NO PAYMENTS FOR 12 MONTHS and super affordable monthly lease payments (less than 1 patient treated per month)
- Erchonia Lasers: \$6000 off FX-635 pain laser and \$5000 of Lunula (nail fungus laser)

Contact me if you are interested and I will connect you: Cindy@pinnaclepa.com



Thank you for joining and keep watching for emails and posts.
If you have a colleague who needs support, please contact info@pinnaclepa.com so we can add them to our email list.

“Extra Extras” will be sent as frequently as possible with helpful tips and information. These are also archived in the Extra Extra tab of www.pinnaclepa.com

Visit www.pinnaclepa.com for more information on how to become a PEP member and stay up to date on everything PODIATRY!

Stay tuned and stay safe😊

