



**JUNE 1<sup>ST</sup>, 2020 WEBINAR**  
**HOSTED BY CINDY PEZZA, PMAC**



WELCOME TO WEEK 12 OF  
OUR COPING WITH COVID-19  
DISCUSSIONS





THIS EVENING WE WELCOME 3 GUEST  
SPEAKERS:

**JAIME JAY AND SARA KNOX OF  
BOTTLENECK MEDICAL VIRTUAL  
SERVICES**

**DAVID LAURINO, DPM OF  
MODERN FOOT & ANKLE CENTERS,  
CO-FOUNDER BOTTLENECK MEDICAL  
VIRTUAL SERVICES**



The graphic features three headshots of speakers against a blue background with a geometric pattern. The Bottleneck Medical Virtual Services logo is in the top right corner. Below each photo is the speaker's name in large blue letters, followed by their title in smaller white letters. A mission statement is in a white box, and the website URL is in a blue box at the bottom.

**Bottleneck Medical**  
VIRTUAL SERVICES

**JAIME JAY**  
OWNER AND FOUNDER OF  
BOTTLENECK VIRTUAL ASSISTANTS

**SARA KNOX**  
CO-OWNER OF  
BOTTLENECK VIRTUAL ASSISTANTS

**DR. DAVID LAURINO**  
CO-FOUNDER OF  
BOTTLENECK MEDICAL VIRTUAL SERVICES

Our mission at Bottleneck Medical Virtual Services is to help podiatrists build deep personal relationships  
with real human beings so they can get their time back and focus on what matters most.

[BOTTLENECKMEDICAL.COM/INQUIRY](https://BOTTLENECKMEDICAL.COM/INQUIRY)



INFORMATION CONTINUES TO CHANGE RAPIDLY SO WE ALL MUST  
TAKE PERSONAL RESPONSIBILITY AND STAY INFORMED  
(I.E. DON'T SHOOT THE MESSENGER!)

**AND NOW THE HOUSEKEEPING PORTION OF OUR PRESENTATION..**

.

# CHANGES ARE BEING MADE TO PPP LOAN FORGIVENESS REQUIREMENTS (BUT, IS IT TOO LATE FOR MOST?)

**Extra!  
Extra!**

*with Cindy Pezzon*

## **Good News, but is it too late?**

Yesterday (5/28/20), The House passed a bill designed to provide more flexibility on how PPP funds can be spent in order to receive forgiveness. The chamber approved the legislation in a nearly unanimous 417-1 vote. The Senate put forward a plan similar to the House bill but has not yet passed it. Senators will convene again next week.

The plan would:

- **Reduce the share of PPP money small business are required to spend on payroll from 75% to 60%**
- **Extend the window businesses have to use the funds from two months (8 weeks) to six months (24 weeks)**
- **Push back a June 30 deadline to rehire workers**
- **Extend the time recipients have to repay the loan**
- **Let companies that get loan forgiveness defer payroll taxes**



# DON'T LET VENDORS TAKE ADVANTAGE

Healthcare workers are classified as high risk. There are certain administrative and engineering controls that can help protect workers.

- Install barriers (such as clear plastic sneeze guards) at the front desk and wherever feasible
- Restrict number of patients in the waiting room
- Take patient temperatures before escorting patient to exam room
- Hang posters in your office reminding patients to stay 6 feet apart
- Report potential employee exposures to your Human Resources manager, so that they can help you keep accurate records (as required by OSHA)

Attachments:

- [New Poster - please display this in your office right away. This is required.](#)
- [Prevent Worker Exposure - this is for your information. It is not required but displaying this as additional information would be helpful.](#)
- [Guidance on Preparing Workplaces - review this guide for more information on administrative and engineering controls and other recommendations on how to protect your employees.](#)
- [Worker Exposure Risk - for your records to document the risk of healthcare workers](#)

## Updated OSHA requirements for COVID-19

OSHA has distributed a new poster that needs to be reviewed with your team AND displayed in an area where all employees can frequently review it (ex: breakroom, near regular OSHA poster). [Click here to view, download and print your new poster.](#) Please hang it up right away!

You should review the following items with your team (be sure to document who was present for the demonstration and the date and time it took place).

1. Locations of all sinks, hand soaps, and alcohol-based hand rubs and how to use them appropriately.

- Alcohol rubs must contain at least 60% alcohol

2. How to properly disinfect surfaces, instruments, equipment, etc.

- Assume everything in the patient room is contaminated and must be wiped down after each patient.

3. Ensure that everyone is aware your practice uses EPA-approved cleaning chemicals

- Ensure proper use according to manufacturer guidelines

4. Train employees on how to properly don and doff PPE - and make sure they are wearing PPE at appropriate times.

5. Educate employees with job-specific education and training on preventing transmission

6. Encourage them to report safety concerns to the manager

7. Encourage them to stay home if they are sick

- Practices should establish a formal policy for employees returning to work.

8. Make certain that each employee is aware of their rights

- Employees have the right to be properly trained, work in a SAFE environment, be provided with appropriate PPE, protected from toxic chemicals, and should know that they can report concerns **without fear of retaliation**

(<https://www.osha.gov/workers/index.html>).

# CONTINUE TO EVALUATE, ADJUST YOUR PRACTICE SCHEDULE AND MAKE ACCOMMODATIONS FREQUENTLY

## 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”





What does your new normal look like?






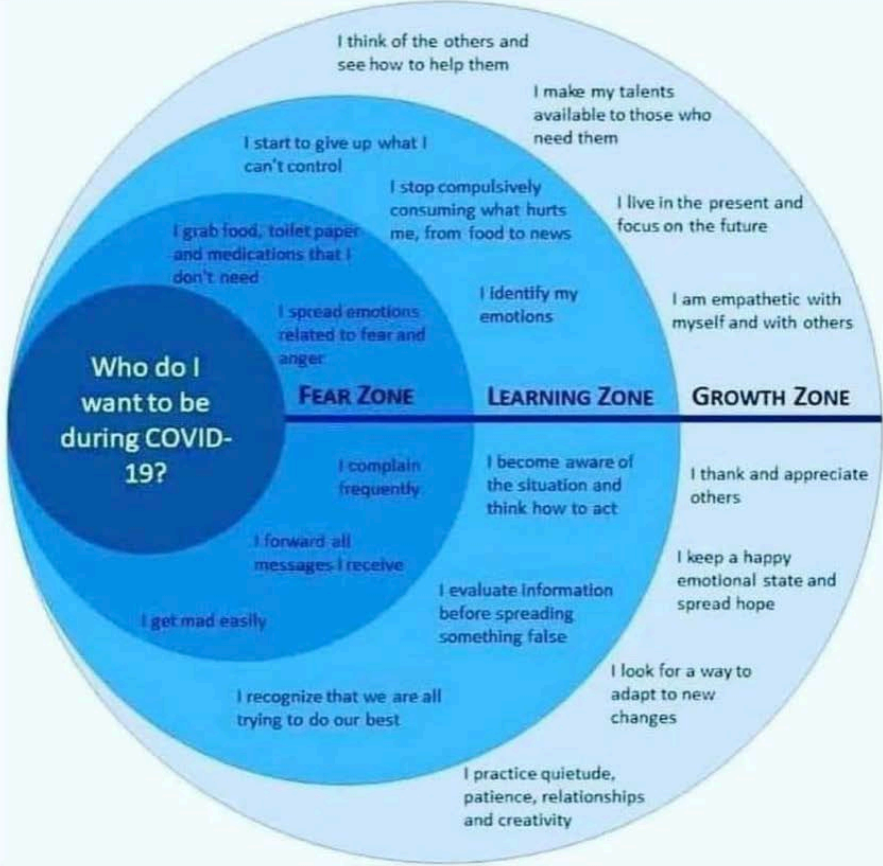
AS PATIENT VOLUME INCREASES,  
WE NEED TO ESTABLISH BETTER  
WAYS OF LIMITING CONTACT  
AND INCREASING SANITATION  
EFFORTS.

WHAT ELSE CAN/SHOULD WE BE  
DOING TO BETTER OUR  
PRACTICES AND OURSELVES?

THIS WILL BE THE FOCUS OF OUR  
DISCUSSION THIS EVENING

 **David Laurino**  
Admin · May 23 at 1:08 AM

What is something positive you have seen, felt or heard during this time? Thanks for sharing!



**Who do I want to be during COVID-19?**

**FEAR ZONE**

- I think of the others and see how to help them
- I start to give up what I can't control
- I grab food, toilet paper and medications that I don't need
- I spread emotions related to fear and anger
- I complain frequently
- I forward all messages I receive
- I get mad easily
- I recognize that we are all trying to do our best



**LEARNING ZONE**

- I make my talents available to those who need them
- I stop compulsively consuming what hurts me, from food to news
- I identify my emotions
- I become aware of the situation and think how to act
- I evaluate information before spreading something false
- I practice quietude, patience, relationships and creativity

**GROWTH ZONE**

- I live in the present and focus on the future
- I am empathetic with myself and with others
- I thank and appreciate others
- I keep a happy emotional state and spread hope
- I look for a way to adapt to new changes

You, Jaime Jay, Michele Poccia Kurlanski and 3 others    2 Comments

 Like     Comment

AND NOW OUR  
FIRST TWO GUEST  
SPEAKERS WILL  
PROVIDE INSIGHT  
FROM THEIR OWN  
PERSONAL  
EXPERIENCE







## 10 REMOTE WORK STATISTICS TO KNOW IN 2020

**SOURCE:**  
<https://justremote.co/articles/10-remote-work-statistics-to-know-in-2020>





REMOTE WORKERS ARE  
**35-40%**  
MORE PRODUCTIVE



SOURCE:

<https://justremote.co/articles/10-remote-work-statistics-to-know-in-2020>

A man with dark hair, wearing a black t-shirt and large black headphones, is sitting at a desk. He is looking at a silver laptop screen with his hands clasped under his chin, appearing thoughtful or focused. The background is a blurred office or cafe setting. The image is framed by a blue border with white circuit-like patterns on the left and right sides.

# 2. 96% of Workers Want More Flexibility

**SOURCE:**  
<https://justremote.co/articles/10-remote-work-statistics-to-know-in-2020>





**3.82%**  
of Remote Workers  
**Have Less  
Stress**

**SOURCE:**  
<https://justremote.co/articles/10-remote-work-statistics-to-know-in-2020>





# 60% of Employers Save Money Thanks to Remote Work

SOURCE:

<https://justremote.co/articles/10-remote-work-statistics-to-know-in-2020>

# 5.

Remote Work Saves  
**54 Million Tons**  
of Greenhouse  
Gas Emissions

SOURCE:

<https://justremote.co/articles/10-remote-work-statistics-to-know-in-2020>





A man with dark hair and a beard, wearing a light blue button-down shirt, is sitting at a dark wooden desk. He is smiling and looking down at a notebook in his left hand, which he is holding with a blue pen. His right hand is holding a clear glass of water. On the desk, there is a silver laptop with a red circular sticker on the bottom left corner, a brass desk lamp, and several papers and notebooks. In the background, there is a white wall with a framed poster of various insects, a potted plant, and a window with sheer curtains. A large blue semi-transparent box is overlaid on the right side of the image, containing the number '6.' and the text '99% of Remote Workers Want to Continue Working Remotely'. The image is framed by a blue border with white circuit-like patterns on the left and right sides.

# 6.

99% of Remote Workers  
**Want to Continue  
Working Remotely**

**SOURCE:**

<https://justremote.co/articles/10-remote-work-statistics-to-know-in-2020>





# 7.

**44% OF REMOTE  
WORKERS  
TRAVEL OFTEN**

**SOURCE:**

<https://justremote.co/articles/10-remote-work-statistics-to-know-in-2020>

# 8.

**75% OF REMOTE  
WORKERS  
REPORT FEWER  
DISTRACTIONS**

**SOURCE:**

<https://justremote.co/articles/10-remote-work-statistics-to-know-in-2020>





# 9.

76% of Remote Workers  
**Will Stick  
with Their  
Employer**



**SOURCE:**  
<https://justremote.co/articles/10-remote-work-statistics-to-know-in-2020>

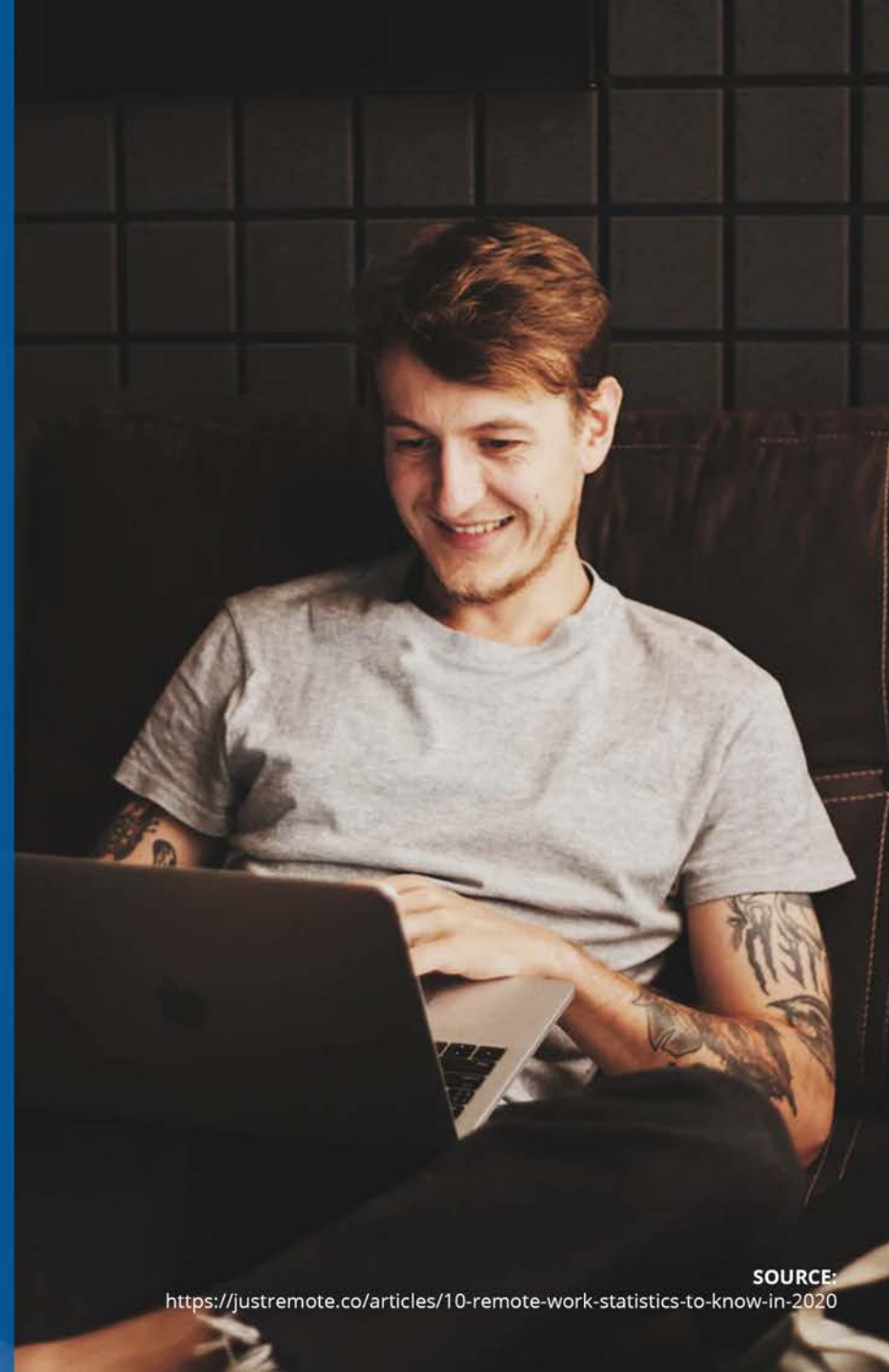


# 10.

Employers That Allow  
Remote Work See a

# 25%

**Reduction in  
Employee Turnover**

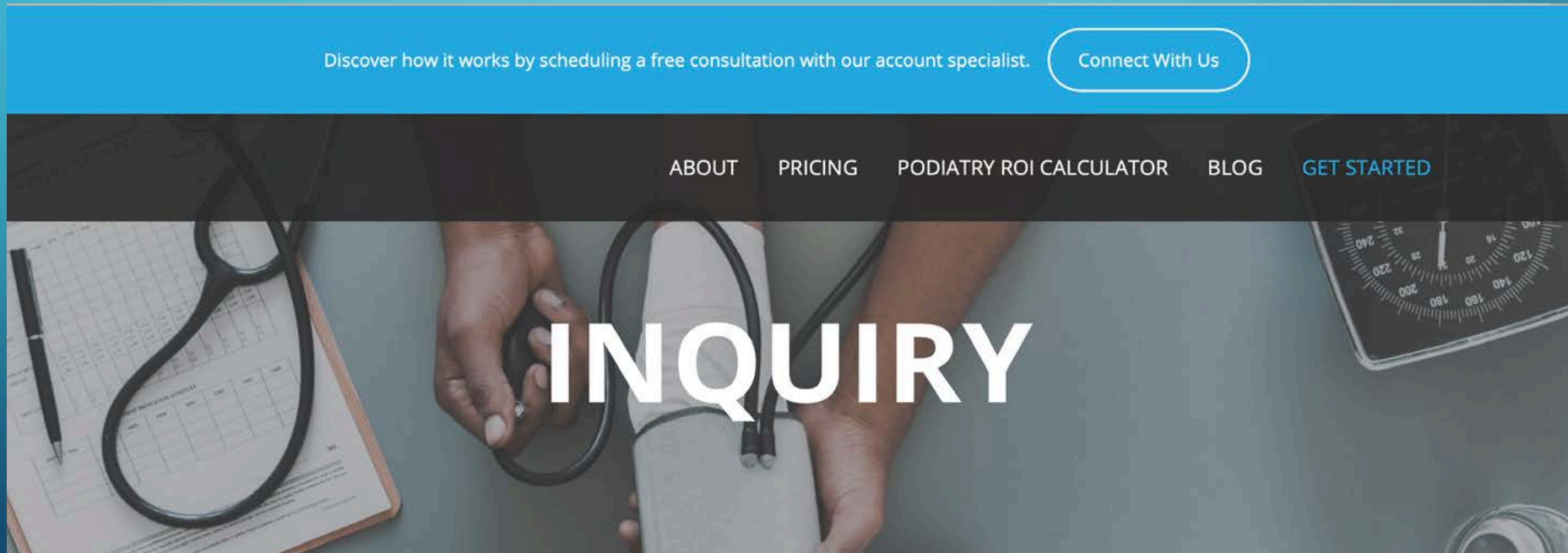


SOURCE:

<https://justremote.co/articles/10-remote-work-statistics-to-know-in-2020>

# THANK YOU JAIME AND SARA!

To set up a consult with BVMS, visit  
<https://bottleneckmedical.com> and click “Get Started”





WE WELCOME OUR FINAL  
SPEAKER OF THE EVENING  
TO DISCUSS:

**The Difference  
between Running  
Lean & Depriving  
yourself of Success**



**Dr. David Laurino**

# INTRO

## Bio:

David Laurino, DPM

20 years in practice

Multiple locations/Multiple Doctors

Systems Driven vs. Staff Dependent  
Practice (pre & post covid)

## **What's this presentation about?**

### Topics:

Lean & Mean Practices

T.I.M.E. (Time, Independence, Money, Energy)

Systems (Brief overview)

Quality of Life



## COLLEAGUE QUOTE

“Everything would be great if I didn’t have any employees”

How many of you feel this way?

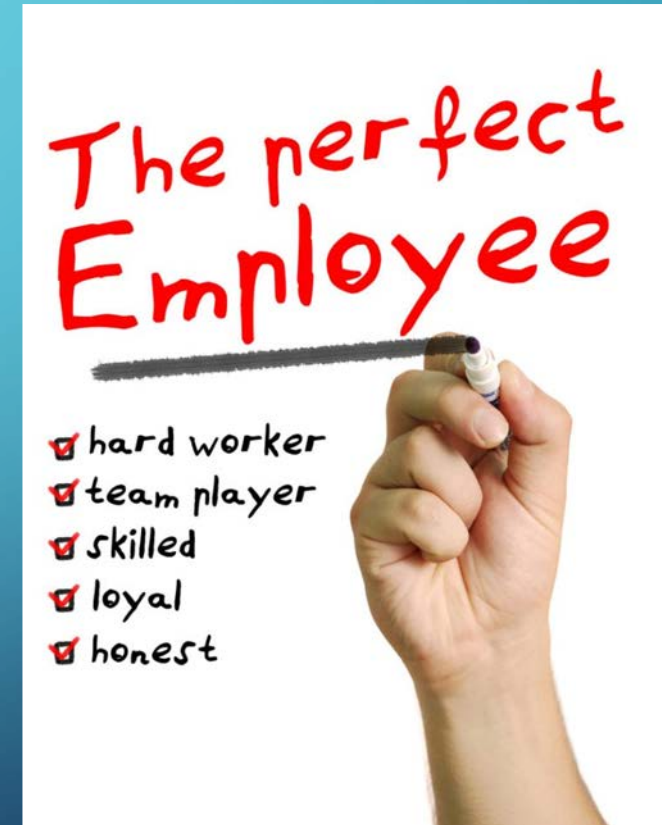
Employees can be good or bad:

# GOOD/GREAT EMPLOYEES: MANAGING MOVERS

Causes of joy, happiness, freedom,  
increase of productivity & revenues.

Low to no turnover - High retention

Team focused, On time, Skills  
Master, Time Maximizer (Clocks  
Don't Matter)





# BAD EMPLOYEES: MANAGING MISFITS

Causes of stress, anxiety, drama,  
depression, loss of productivity &  
revenues

Costs of employee turnover

Egotists, Absenteeism, Skills Gap,  
Time Wasters (Clock Punchers)



# LEAN & MEAN FOR PRACTICE SUCCESS

How to run lean and be a successful practice?

1. Lean systems
2. Lean operations
3. Lean staff

Lean methodologies all around = Podiatry Practice Success



# LEAN & MEAN FOR PRACTICE SUCCESS

How to run lean and be a successful practice?

## 1. Lean systems:

Defined: A systematic approach to the identification & elimination of waste & non-value added activities through employee development & continues improvement in all products & services.

# LEAN & MEAN FOR PRACTICE SUCCESS

How to run lean and be a successful practice?

## 2. Lean Operations:

Defined: A means of running an organization by focusing on providing greater patient satisfaction while using as few resources as possible. The objective of lean operations is twofold:

1. Creating value for patients
2. Eliminating waste

Practices that use lean operations are highly concerned with efficiency

# LEAN & MEAN FOR PRACTICE SUCCESS

How to run lean and be a successful practice?

## **3. Lean Staff:**

Defined: It simply means to analyze staff based on processes, tools, training or performance to determine what is really happening and how to make it better.



# BENEFITS OF A LEAN PRACTICE

1. Manage Team/Process Complexity
2. More efficient Business Processes
3. Better Management of Changing  
Priorities
4. Better Project Visibility @ The Team  
Level
5. Increased Team Productivity

6. Reduced Lead Time

7. Increase Team Morale

8. Improved Vision for All

9. Reduced Costs

10. Predictable Delivery of Patient Value

\*Lean methodologies all around = Podiatry  
Practice Success

# SHOULD I OUTSOURCE/LEVERAGE MY PRACTICE/TIME?

**Ask yourself these questions?**

**Where Will Your Best Employee Be 1 Year From Now?**

**Do I Run My Practice, or Does My Practice Run Me?**

**Do I Have The Freedoms I Want & Deserve?**

# WHAT'S YOUR TIME WORTH?

What do we all want more of but CAN'T have it?

**TIME**



What do we all want more of and CAN have?

**T.** Time for yourself, friends, family

**I.** Independence (Autonomy)

**M.** Money

**E.** Energy

**QoL** = Quality of Life

**QoL** = Quality of Leverage





>60%

More than 60% of physicians surveyed nationwide said they value their personal time as much or more than they value their work.

M3 Global Research in August 2017

# WHAT IS A SYSTEM?

Defined:

Simply put, a system is an organized collection of parts (or subsystems) that are highly integrated to accomplish an overall goal. The system has various inputs, which go through certain processes to produce certain outputs, which together, accomplish the overall desired goal for the system.

# PRACTICE SYSTEMS?

- ❑ How we answer the phone
- ❑ How we process new patients
- ❑ How we present tx plans
- ❑ How we make financial arrangements
- ❑ How we schedule patients
- ❑ How we set up/break down rooms
- ❑ How we make sure stuff happens on time
- ❑ How we sterilize instruments
- ❑ How we open and close the office
- ❑ How we hire and train new employees
- ❑ How we pay bills, issue refunds, post EOB's



# A PODIATRY PRACTICE WELL-OILED MACHINE

- ❑ Increase efficiency
- ❑ Prevent mistakes, lost opportunities, and bad Google reviews
- ❑ Save Time
- ❑ Keep the Team Accountable
- ❑ Ensure Consistency & Consistency leads to Customer Satisfaction
- ❑ Encourages Teamwork
- ❑ Reduces Conflict
- ❑ Simplify Employee Onboarding & Training
- ❑ Create better Leaders
- ❑ Create Freedom

# 7 STEPS TO SCALABLE SYSTEMS

1. Allocate Time
2. Identify Core Processes
3. Apply 80/20 Rule
4. Define & Document Each Process
5. Eliminate, Automate, Delegate, Simplify
6. Implement & Retrain
7. Refine, Rinse & Repeat

**“94% OF PROBLEMS IN ORGANIZATIONS ARE  
CAUSED BY SYSTEMS, NOT PEOPLE.”**

- W. Edwards Deming





# THIS IS THE MOST IMPORTANT TAKEAWAY:

Why are we doing this practice thing?

To support our emotional & financial stability for us and our families.

Our practices are a vehicle to fun, happiness, relationships, freedom, and total quality of life.



A scenic view of a mountain valley. On the left, a tall, narrow rock formation rises steeply. The valley floor is covered in greenery, and the background shows more mountain ranges under a hazy sky. The quote is overlaid on a dark rectangular background in the center.

Our job is improving the quality  
of life, not just delaying death.

Robin Williams

“ quote fancy

# K.I.S.S.S.S.

Keep It Simple with  
Stupidly Simple Systems





Task	Does the DPM need to do it?	Does (or should ) staff perform the task (with explanation)	Does it need to be performed in the office?
Answer the phone/schedule appointments	NO	Yes (Scripting and essential information to capture is established)	NO
Review the schedule to flag New Patients or New Est. Patients	NO	Yes (this allows us to perform eligibility and benefit checks)	NO
Add comments to scheduler (high deductible, balance owed, etc)	NO	Yes (it should be clearly marked if a patient will owe any monies at TOS)	NO
Call New Patients to perform a pre-visit interview	NO	Yes (if all demographic, medical information and reason for visit is entered prior to visit, encounter times in the office are dramatically reduced)	NO
Review clinic patients and comments prior to office hours	YES (with staff)	Yes (front and back office staff and doctors should huddle prior to clinic hours to prep for day)	YES
Printing of statements for patients with balances prior to check-in	NO	Yes (having statements ready for patients to review regardless of if one or multiple have been sent is key to collecting at TOS)	YES
Readying of these statements for printing prior to clinic day	NO	Yes (it should be easy and quick for in office staff members to access these statements in order to print on demand)	NO
Prior-Authorizations for specialty services and products dispensed	NO	Yes (calling insurance companies or obtaining information on coverage on insurance websites prior to visit is essential) Ex: Orthotic Coverage	NO
Maintaining inventory (never running out but not having too much)	NO	Yes (we need to make sure all of the required or potentially required devices and supplies in the front and back office are stocked)	YES
Ordering of office and clinical supplies	NO	Yes (working with vendors to establish streamlined ordering processes while receiving best pricing and watching for hidden fees is essential)	NO
Charting and documentation of office visits and procedures	NO (DPM has to review and sign prior to not being "closed")	Yes (staff/scribes should be able to assist with encoutner documentation and be familiar with required verbiage built into templates/blueprints)	NO
Readying DME compliance documents, ABNs, Consents, etc.	NO	Yes (staff members should be aware of documents required depending on services and which require patient and witness signature)	YES
Patient related communications to referring providers	NO	Yes ("Thank you for your referral" letters and progress notes on existing patients should be sent to referrng providers within one week of visit)	NO
Follow up with No Shows	NO	Yes (we must document when New and established patients fail to present for their visit and what action was taken/attempt to reschedule)	NO
Attempts to collect past due balances	NO	Yes (after sending multiple statements, a staff member should call the patient to assure we have correct mailing or email address and then attempt	NO
Scheduling of surgeries in outside facilities	NO	Yes (after conservative care has been exhausted and patient is scheduled for surgery, staff member should coordinate pre-op visit, schedule surge	YES
Medical Record Requests	NO (DPM has to review prior to releasing to patient or insurer)	Yes (no staff member should ever send records or requested documents prior to DPM reviewing all information)	YES
Performing medical treatments and services	DPM with staff assistance	Yes (all staff members should understand what is required for all commonly treated conditions per written treatment protocols)	YES
Monthly reporting	NO	Yes (a member of staff or billing team should be providing monthly reports clearly depicting metrics on a monthly basis)	NO
TEAM meetings	YES (DPM should always participate)	Yes (all staff members, remote and in-office should participate in team meetings with structured agendas and notes taken)	NO (using Zoom to include virtual staff)
TEAM inservices	YES (DPM should always participate)	Yes (all staff members should participate in regular in-services/trainings to review protocols and new concepts; this is a learning session)	NO (using Zoom to include virtual staff)

THANKS!

[DRLAURINO@YAHOO.COM](mailto:DRLAURINO@YAHOO.COM)



LET THE CHAT  
QUESTIONS AND  
OPEN  
DISCUSSIONS  
BEGIN





THANK YOU FOR JOINING!  
IF YOU HAVE A COLLEAGUE WHO NEEDS SUPPORT, PLEASE CONTACT  
[INFO@PINNACLEPA.COM](mailto: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](http://www.pinnaclepa.com)

Visit [www.pinnaclepa.com](http://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😊

