

DMO Office Checklist for Adjusting Hours, Services, or Closure - Version 1.3

✓ Action	Owner	Comments
1 Communicate Decisions via Project Endure GoogleSheet		
<input type="checkbox"/> Determine if Open, Part-Time, Essential, Emergency, Closed, or Re-Open Status	DMO	Update Daily as Office Statuses Change
2 Update FINDA		
<input type="checkbox"/> Indicate hours, days, and key information to be updated - this is very important	DMO/Marketing	Required for Call Center/Website Accuracy. Must indicate which office patients are being referred to
3 Coordinate Schedules and Patient Communication		
<input type="checkbox"/> Block schedules so no new appointments can be booked;	DMO/Betsy/ Support	NOTE: OpenBook Offices, contact Betsy.Engel@smilebrands.com before proceeding with blocking schedules
<input type="checkbox"/> Place sign on door for patients and deliveries	DMO	Door Sign available on COVID-19 resource page https://smilebrands.com/covid-19/
<input type="checkbox"/> Phones need to be forwarded to Call Center (1-800 number)	DMO/Betsy	1-800 number to call center with Betsy, DO NOT FORWARD TO SISTER OFFICE
4 Reschedule Patient Appointments and Re-routing Patients:		
<input type="checkbox"/> PacWest: Call Center calls NPs and OM/DMO to call CPs	DMO/Betsy	
<input type="checkbox"/> CENTAC: OM/DMO to call both NP/CPs	DMO	
<input type="checkbox"/> Before closure, contact/reroute patient treatments to sister office; ensure patient charts and cases are shared	DMO	DMO to coordinate with current and sister office OM's to ensure continuity for the patient
<input type="checkbox"/> For urgent/emergency treatments, ensure patient knows which office to contact	DMO	
5 Team Member Updates		
<input type="checkbox"/> Ensure accurate eSmiles hours submission, PTO requests entered/approved, and unpaid time submitted/approved	DMO	DMO can coordinate with Payroll to ensure accuracy; if approvals need to be rerouted contact Payroll
<input type="checkbox"/> Make sure emergency contact list is up-to-date	DMO	
<input type="checkbox"/> Contact IT to load email OOO messaging and email is forwarded to correct person as needed	DMO/IT	Directions to be entered in the Comments section of your People GoogleSheet
<input type="checkbox"/> Confirm providers have their home address set for any Dental Board communication	Provider/DMO	
6 Support Revenue Cycle Management and Banking		
<input type="checkbox"/> Clear Collaboration Tool requests (e.g. provide attachment requests, narratives, etc)	DMO/OM	Coordinate with the CBO to ensure Collaboration Tool requests are complete before closing
<input type="checkbox"/> Provide required SBF credentials and documents	DMO/OM	Coordinate with the Patient Credit Services to ensure SBF requirements are complete
<input type="checkbox"/> Batch out all Checks and Credit Card Transactions	DMO/OM	Coordinate with banking/accounting team
<input type="checkbox"/> Take all bank deposits to bank (do not leave in safe) for deposit by day of close	DMO/OM	Coordinate with banking/accounting team
7 Supplies, Labs, and Facilities Services		
<input type="checkbox"/> Contact Cheri Batesole and Janine Pfister to redirect any supply or lab orders, including auto-fill orders	DMO/OM	
<input type="checkbox"/> Contact facilities services, or contact Janine Pfister to cancel any facilities services	DMO/OM	If services are managed by operations locally, please reach out to cancel; Janine can coordinate those services provided through her office
<input type="checkbox"/> DMO to transport cases and high value, scarce supplies to redirected sister facility	DMO/Ryan	Based on patients rerouting, ensure care is taken to transport the scarce supplies and necessary cases to the right referred sister facility
<input type="checkbox"/> Run cleaner in all lines to prevent build up or sediment from drying and clogging	DMO	Consistent with routine maintenance policy
<input type="checkbox"/> Walk office to make sure there are no plumbing leaks (sinks, toilets, etc.)	DMO	If any, report to facilities services team
<input type="checkbox"/> Make sure all medication and prescription pads are locked up and secured	DMO	
<input type="checkbox"/> Office lockup, windows/doors, secure entry/exit, set thermostats, and alarm	DMO	Normal operating procedure
8 Redirection of Mail		
<input type="checkbox"/> Package existing mail and necessary documentation including pre-authorizations, checks, payer documents, etc via Fedex/UPS to SBI:	DMO	Contact: bndmailroom@smilebrands.com Irvine Support Office Address and Contact: Shirley Boykin @ Smile Brands - 100 Spectrum Center Dr. Suite 100, Irvine, CA 92618
<input type="checkbox"/> PacWest QSI Offices mail will be directed to Irvine Support Office via USPS website;	DMO	San Antonio Support Office Address and Contact: William Borrego @ Smile Brands, 8415 Datapoint Dr. suite 1020, San Antonio, Texas 78229
<input type="checkbox"/> Non-QSI Offices mail to be directed to San Antonio		
<input type="checkbox"/> CENTAC mail will be directed to San Antonio Support Office via USPS Website	DMO	
<input type="checkbox"/> JFD offices mail will be directed to the Goleta Offices	DMO	Contact: Amy Buttery for JFD - abuttery@johnsondmc.com 7050 Hollister Avenue Ste. 101, Goleta, CA 93117
9 Systems and Reporting (For Non-QSI and Non-Ascend offices)		
<input type="checkbox"/> DMO/OM must run Month to Date reports at the end of last day of practice from legacy systems of Non-QSI and Non-Ascend practices	DMO/OM	Reports include Provider Production, Collections, and A/R Reports, consistent with reports traditionally run to support month-end needs of Finance team
<input type="checkbox"/> DO NOT TURN OFF COMPUTERS TO ENSURE REMOTE ACCESS OF NON-QSI and NON-ASCEND SYSTEMS	DMO/OM	Turning off the computers will disable necessary remote access to systems
10 Update Project Essential! Google Sheet with latest Practices and People Changes		
<input type="checkbox"/> Contact Joyce.Newman@smilebrands.com with questions		PacWest GoogleSheet
<input type="checkbox"/> Contact Julia.Breechen@smilebrands.com with questions		CENTACT GoogleSheet
<input type="checkbox"/> Contact mjettner@decisiononedental.com with questions		D1 GoogleSheet
<input type="checkbox"/> Contact Joan.Vandermeulen@smilebrands.com with Support questions		