

# CRISIS MANAGEMENT CHECKLIST

## EYE RECOMMEND MEMBER OPTOMETRISTS

Updated: April 6, 2020

During these unprecedented times, many, if not all of us were caught off-guard with the mandates, new procedures and decisions that had to be made quickly. Outlined below is a list of items to consider in various areas to support your practice operations and navigate through these challenging times.

### Office Closure

- Take down, document, store inventory so it is out of sight to reduce any chance of theft
  - Ensure you keep the inventory in a secure place and record who has access
  - Set times to check on the inventory to reduce any potential theft
- Security
  - Step up security with cameras or re-position cameras to specific angles
  - Change your alarm codes and only give access to those necessary
  - Re- consider your lighting during the closure and timing
  - If no one is at the office, plan to go in every 3-4 days to check on the space, run the taps, water plants etc.
  - Remove any valuables from the premises
- Documents
  - Do a back-up of all computer files
  - Make sure you take all important documents home or have copies at home
- Unplug any equipment that does not need to be plugged in
- Redirect couriers or any shipments to home or active working staff members
- Communication
  - Post signage on the front door with contact information and closure information
  - Change your voicemail message including how to contact you, regularly checking phone/email, who to contact/where to go for emergencies
  - Send out a notice/email to your current patients with updates
- Update your Digital Presence
  - Consider a pop-up or banner with contact information, updated hours, definition of what is emergency eye care, how to contact someone or where to go with an emergency
  - Update your Eye recommend clinic locator
  - Update your google business page with hours and contact details
  - Post on social media accounts with updated hours or notification of closure
- If your practice is not seeing patients, talk to other colleagues in the area and see if you can join forces to help look after patients

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## Human Resources (HR)

- Keep in touch with personal messages to your staff and associates including:
  - Staff working virtually from home
  - Staff that have been temporarily laid off
- Support your team with applications for EI and any questions they may have
- Continue weekly staff meetings
- Preserve your culture
- Build team skills for a fast re-start
  - Specialized online training
  - Rotate phone coverage
  - Introduce special projects
  - Tackle projects you haven't been able to check off your list
- Make sure you have up-to-date contact information
  - Email and phone number for all staff and associates
- Create a communication plan with associates
  - Include them on staff communications
  - Invite them to participate in virtual calls you have with staff
- Create a communication plan with staff
  - Let staff know when to expect emails from you
  - Set a schedule such as every Wednesday morning or every other day
  - Communication may need to be more frequent at first
  - Suggest weekly touch bases at minimum as this stretches out
  - Reach out and/or have a check-in plan to connect with any staff that live alone and are isolated from family
- Look into some communication platforms to stay connected
  - Zoom
  - WhatsApp
  - Private Facebook Group
  - Microsoft Teams
  - Skype

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## Financial

- Prepare a cash flow and income statement with a minimum of 6 months (preferably until end of the year: April-Oct)
- Cut all operating and non-essential expenses to zero
  - Reduce buying
  - Reduce corporate expenses
  - Maintain essential expenses if possible (IT, security, mandatory building maintenance, etc.)
- Understand and reconcile your credit and banking statements
  - Bank balances
  - Auto payments
  - Credit cards
- Manage receivables
- Look at possible deferrals
  - Credit card payments (interest only)
  - Leases (equipment, building, vehicles, etc.)
  - Mortgage deferrals available for real estate owners or Rent Relief for tenants
- Look into temporary benefit suspension to save on premiums (ex. stop coverage for dental until dentist are open, but maintain medical)
- Equipment options
  - Leasing companies may be able to buy back equipment less than a year old and lease back under good terms
- Contact your financial institution(s)
  - Discuss 4-6 months deferment of all commercial and personal loans and mortgages
  - Apply for extended line of credit for start-up cash flow
- If you haven't already, investigate any provincial and federal government subsidies, Interest free loans, deferments including, but not limited to:
  - ➔ **CEBA – CANADA EMERGENCY BUSINESS ACCOUNT** (up to \$40K) – Apply Now (contact your bank)  
*0% interest | Loan forgiveness up to \$10,000 provided balance is paid on or before December 31, 2022*
  - ➔ **BDC – SMALL BUSINESS LOAN** (up to \$100K) – Apply Now ([BDC.ca](https://www.bdc.ca))
    - Business credit availability program
    - GST/HST deferral programs
    - Income tax deferrals
    - Wage subsidies
    - Business income tax payment deferral
- If necessary, look at other cashflow and credit options including:
  - Credit cards
  - RRIF withdrawals (can indirectly be pulled from a parent or family member and loaned to the practice)
- Connect with your financial advisor, accountant or lawyer for additional information
  - Prepare for best, worst and probable scenarios and ask the questions
  - Understand there could be a backlog in applications, so plan ahead
  - Don't be afraid to ask for help and advice
- Follow your financial institution and accounts website for updates on programs and taxes

## Marketing/Alternate Revenue

- Stay connected with patients
  - Weekly eblast with updates, links, articles, key contacts - that shows you care and are available
  - Provide guidance on emergency care
  - Be Social: Facebook/Instagram/Twitter – tips to stay safe, fun pics, fun things to do
- Offer community delivery at no cost
  - For those who need items such as eyedrops, eyewear cleaning supplies
  - Or have a 'curbside' pickup that you can schedule and arrange following social distancing practices
  - Arrange for at home delivery for contact lenses (or arrange for them to pick up as per above if they prefer)
- Set up an e-commerce platform and start 'marketing' and creating awareness of what you offer (Sightly)
- Evaluate telemedicine options
  - Patient to Optometrist: Doxy, Eyecare Live, GetSetPro, Livecare, Zoom Health
  - Optometrist to Ophthalmologist: Care1 platform, reach out to a local OPMD, test as an emergency pandemic service
- Look and plan for alternative revenue streams - some available virtually to support your patients, others start building the plan now for when you re-open
  - Dry Eye
  - Vision Therapy
  - Myopia Control
  - Cosmetics
  - Aesthetics
  - Accessories

## Process to Re-Open

- Develop your Start Up Plan for when you re-open:  
Plans should include OD hours, priority of patient recalls, social distancing policies, infection control, no waiting protocols etc.
  - Partial, full, extended clinic hours
- Source and inventory personal protective equipment (PPE)
  - Understand your minimum requirements to re-open
  - Determine the ideal protection
  - Ensure you plan ahead to have required PPE on hand for when you resume patient care
  - Provide links and support for proper gloving/de-gloving, masking/de-masking
- Develop and train for disinfection
  - Establish a protocol
  - Look into video/online/phone training with staff

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## Personal

- Limit your exposure to media, once a day, reputable links and sources, Be Mindful
- Reduce your stress
  - Stay active
  - Healthy diet
  - Regular sleep
  - Plan your day
  - Read a book
- Personal expenses
  - Stay lean at home
  - Limit online purchases to necessities
- Learn something new or pick up something you haven't done in a while including hobbies, puzzles, baking, needlework, painting, reading/audiobooks, outdoor activities, gardening, new language etc.
- Stay connected virtually with friends and family and those you have been meaning to re-connect with
  - Virtual social event
  - Virtual coffee meetup
  - Online game night