Sample Patient Communications

Patient communication has many layers to consider. Use the samples below to understand what communication looks like on various platforms. Additional patient communication tools and templates are available on the CDA Back To Practice page.

Communication During Shelter in Place

Update your Website:

- Add a “COVID-19” pop-up to your home page for easy access to information you want patients to be directed toward. The pop up might say
  - OPTION 1:
    
    Due to the COVID-19 crisis and stay-at-home orders in the State of California, our office is currently closed except for emergency care. If you are experiencing a dental emergency, contact our office at ______. We are eager to re-open and provide you with dental care. We will contact you as soon as we learn it is recommended by local and state authorities to re-open!

  - OPTION 2:
    
    We are eagerly preparing our practice to welcome patients back safely in the coming week. Here is a quick update about our practice hours and operations. As California begins to lift the stay at home order, we will start seeing patients for routine care, we anticipate resuming normal business hours on <DATE>.

    If you have any urgent questions or concerns, please feel free to call <INSERT PHONE NUMBER> or email <INSERT EMAIL> us. Doctor <DOCTOR NAME> and team members are available to help.

    We look forward to seeing you soon!

- Define your current practice protocol for seeing emergency care patients. (How does a patient make an emergency appointment in your practice)
- Add a section to the website on Infection Control and include links to relevant websites, such as the CDA, CDC, OSHA and the Dental Board of California, where patients can obtain information about the measures your practice will take once it re-opens.
• Write a Blog Post on the topic of “COVID-19 and the Safety of our Patients – What we are doing to prepare for your next visit”. Your website host may have a sample blog post for you to customize or see the sample blog below.

Sample Blog Post (link from the ‘website’ section):

**COVID-19 and the Safety of our Patients: What we are doing to prepare to re-open**

By Dr. [your name]

As the COVID-19 pandemic has unfolded and impacted all of our lives, we have been faced with questions about how to lead our daily lives through the stay-at-home orders. In recent weeks, the focus for many of us has shifted to asking how to get back to our routines and find a “new normal”, understanding that this pandemic has changed the way many of us will conduct our daily lives. We’ve all felt how uncomfortable and frustrating the uncertainty and restrictions can be. I want to make sure that your experience in our practice is not met with any anxiety and fear and is not an area of the “new normal” that causes you angst. My goal is to be as transparent as possible by answering your questions related to infection control and COVID-19, with the ultimate hope that you’ll feel more confident in visiting our practice when we are able to re-open.

We have been, and will continue to, communicate to our patients through a variety of communication methods. Such methods include our social media pages (link here), our patient newsletter (link here), and this website. We have added specific infection control information to this website, which we encourage you to read to ensure you of the measures we have implemented (link here).

We are open for dental emergencies only at this time. If you are experiencing a dental emergency, call us and we can assess your oral health concern. We are following the recommendation of (list authorities here such as CDA, ADA, CDC, Dental Board of CA) to guide the date in which we re-open. The closure of our office not only will help limit exposure to and transmission of the virus for patients and staff, but it also helps preserve and extend the supply of personal protective equipment that is badly needed in hospitals.

I cannot tell you how much I appreciate your continued support, your compassion and your understanding of the changes that have and will occur in our office due to these troubling times.
Communicate through Social Media:

- Post weekly to the practice’s social media platforms leading up to the practice’s re-open date. (See samples below)
- Consider posting a video from the practice owner(s) to thank patients for their support, reassure patients that you will re-open when it is safe, and inform them of the extra precautions you and your team will be implementing.
- Post updates related to infection control – take a picture of the new PPE that will be worn, show a video of how you and your team disinfect surfaces, sterilize instruments, screen patients for infectious diseases, etc. Keep the videos short and to the point.

Communicate through e-mail and digital newsletters

There likely is a COVID-19 newsletter template offered through your Patient Communication System or see sample newsletter on the following page:
Dear PATIENT,

We hope that this letter finds you and your family in good health. Our community has been through a lot in the last few months, and all of us are looking forward to resuming our normal routines. While many things have changed, one thing has remained the same at [insert practice name]: our commitment to your safety.

Infection control has always been a top priority in our practice, and you may have seen this during your visits in the past. Our infection control processes are made so that when you receive care, it is both safe and comfortable.

Our office follows infection control recommendations made by the California Dental Association, the U.S. Centers for Disease Control and Prevention, and the Occupational Safety and Health Administration. We closely follow the activities of these agencies so that we are up to date on any new rulings or guidance that may be issued. We do this to make sure that our infection control procedures are current and adhere to each agencies’ recommendation.

You may see some changes when it is time for your next appointment. We made these changes to help protect our patients and staff. For example:

• Our office will communicate with you within 48 hours before your appointment to ask some COVID-19 screening questions. You will be asked these same questions again when you arrive at our office in a special “Patient Screening” location which will be clearly marked outside our office. A member of our team will be stationed there to greet you and ask the screening questions.

• We have hand sanitizer that we will ask you to use before you enter the office, after the screening is conducted. You will also find hand sanitizer in the reception area and other places in the office, for you to use as needed. We will take and record your temperature upon arrival at our office as a part of the screening process.

• Masks must always be worn by all persons for the entire visit. We will have you remove your mask for your procedure only.

• We will ask you to text us when you arrive so that we may let you know when we are ready to see you at the screening area. We will only see one patient at a time in our screening area.

• You may see that our waiting room will no longer offer magazines or reading material. We will further minimize paperwork in our office and conduct as much business as possible through our digital patient management system.

• Appointments will be managed to allow for social distancing between patients. This might mean you are offered fewer options for scheduling your appointment, and this is the means we must take to ensure everyone’s safety. We appreciate your understanding.

• We may ask that you wait in the car before / after your screening to control the patient traffic in our office.

• We will do everything possible to make sure you feel safe and welcome in this new environment. We so look forward to opening our doors soon, but of course, we are awaiting further communication from our local, state and federal components. We look forward to seeing you soon.

Should you have any questions or concerns, please reach out to our office at ____________.

Sincerely,

Dr. ____________
Send a brief questionnaire to your patients to assess the following:

- Interest in scheduling an appointment when office re-opens.
- Interest in scheduling an appointment a few months after office re-opens.
- Not interested in scheduling at this time for 6 months or longer.
  - Follow-up with questions to assess specific concern: such as concerns about infection control, exposure, financial, etc.
  - Follow-up with a personal phone call to the patients who express concern to reassure the patient and be a source of comfort. See sample scripts below:

**Patient Concern Script #1: Patient concern about Infection Control / Exposure**

Hello Mrs. Smith, this is Jane from Dr. Dentist’s office. I’m calling to see how you are doing through the stay-at-home orders. I also saw that you responded to our questionnaire and I appreciate your honesty in telling us you have some concerns about scheduling your next dental appointment once we re-open. Infection control has always been a top priority in our practice, and you may have seen this during your visits in the past. Our office follows infection control recommendations made by the California Dental Association, the U.S. Centers for Disease Control and Prevention, and the Occupational Safety and Health Administration. We always follow the activities of these agencies so that we are up to date on any new rulings or guidance that may be issued. We do this to make sure that our infection control procedures are current and adhere to each agencies’ recommendation. We have implemented some additional procedures with the concern of COVID-19 exposure to further enhance our infection control procedures. If you'd like to read more about those procedures, I am happy to e-mail or fax you a fact sheet, so you know exactly what to expect at your next visit in our office. You have always been, and will always be, safe in our care.

**Patient Concern Script #2: Patient concern about Financial Obligation as result of COVID-19**

Hello Mrs. Smith, this is Jane from Dr. Dentist’s office. I’m calling to see how you are doing through the recent stay-at-home orders. I understand from your e-mail response to our questionnaire that you have some concerns about scheduling your next dental appointment once we re-open. I know this has been a challenging time for many members of our community and am sorry to hear your job (or your business) has been impacted. We certainly understand if you need some time before you can return to our office for care. We do offer (insert your payment options here – such as third-party financing, payment plans, membership program etc.) to make it as comfortable as possible for you to maintain your dental health. Your oral health is important to us, and we don’t want any of the areas we’ve been watching to develop further without treatment. Thank you for informing us of your concern and please call us if you have any additional questions.
**General tips for comforting your patients with concerns:**

- Conduct your research on the patient before you call
  - are they in a high-risk category?
  - do they care for someone who is high-risk?
  - do they have children living at home who are out of school?
  - are they normally compliant/not compliant with dental appointments and treatment?
  - are they essential workers or provide a service deemed essential?
  - have they been furloughed or laid off and may be concerned financially?
- Ask the patient how they are doing with the current stay at home orders.
- Explain that you are doing your part to flatten the curve to prevent the spread of Covid-19 and ensure hospitals have the necessary PPE.
- Patients appreciate knowing that you haven’t shut the doors permanently and that you are anxiously awaiting their return to your practice.
- Tell patients that you are looking forward to seeing them when they are ready to come back and when it is safe to resume business.
- Ensure all staff are on the same page about patient concerns and frequently asked questions. Reference the CDC Guidelines for Infection Control in Dental Settings and print out the frequently asked questions page on Covid-19.

**Communication Post Shelter in Place**

Refer to “Back to Practice – Preparing the Practice to Re-Open” for checklist of items.

- Prepare your communication system, turn on appointment confirmations with COVID-19 protocols in the emails.
- If you have a firm open date, begin enabling your patient communication system for two weeks out (popular communication systems include: Demandforce, Yapi, Solutionreach, Weave, and NextHealth).
- Add the most important new protocols directly to the confirmation email (do not add it to the confirmation text, this may cause the text to send as multiple entries).

  **Examples:**
  - Example: GP practice, only the patient can attend the appointment unless special arrangements are made
  - Example: Pediatric Practice: only the patient and one guardian can attend the appointment unless special arrangements are made
  - Patients will be required to wear a mask in the reception area and upon exit
Sample appointment confirmation email:

To J Rogers@gmail.com

Subject Your Upcoming Dental Appointment

Hello James,

You have an upcoming dental appointment on [Appointment Date] at [Appointment Time]. Per new health and safety recommendations, we will require all patients to wear a mask and limit the number of people in our reception area. If you have any questions please email or call us.

If you need to reschedule, please call us today at XXX-XXX-XXXX.

Thank you,
Bright Smile Dentistry
Scheduling Patients - COVID-19 Precautions

Patient Triage to Assess Appointment Need and Procedure Type

- Start with the list of patients who missed appointments during COVID-19 precautions.
- Triage those “missed appointments” into categories and prioritize based on patient need.
- Divide the “missed appointments” first by appointment type, then separate by treatment necessity. Create a list of patients who should be seen in the next month, next two months, next three months and next six months.
- Consider “Day One” of resuming patient care as a soft rollout. Schedule fewer patients to give you and your team time to become comfortable with the extra steps for infection control, patient screening, PPE changes and additional disinfection time.
- Start with the patients who you have identified as “priority,” including those with urgent dental needs or who are in temporaries.
- Estimate how much chair time is needed in units. (Units can be 10- or 15-minute increments.) See Back to Practice – Staging the Dental Practice for staging considerations that may add time to the patient appointment.
- Determine if aerosols will be generated for each patient procedure.
- Print an empty page from your appointment scheduler or make a schedule showing time in units.
- If aerosol generating procedures (AGP) are anticipated, schedule those patients as the last appointments of the day to allow aerosols to settle.
- Consider conducting similar appointment types on the same days of the week (i.e., Monday/Tuesday for restorative appointments and Wednesday/Thursday/Friday for hygiene appointments).
- Consider scheduling an extra 15 minutes for each appointment for the patient screening, hand hygiene and disinfection of touched surfaces, as well as to allow social distancing in reception area.
- Schedule patients in higher risk groups (those older than 60 and/or those with underlying health conditions) early or late in the day or when office traffic is minimal.
- Using your printed schedule, pencil in the appointments using the criteria above.
- Contact the patients and begin to populate your schedule with highest-priority patients.
- Have the schedule template for the entire first week ready in the event a patient cannot come on the day or time you offered.
- Once the “first priority” patients who missed appointments have been contacted, follow the same process to triage patients with future appointments. Most practices will need to adjust the future schedule to manage social distancing and patient traffic.
Front Office Scheduling Considerations with COVID-19 Precautions

- Front office staff can wear a mask or face covering.
- If feasible, install a clear plastic barrier at the front desk where patient encounters occur. If not feasible, front office staff can wear goggles or face shields in addition to masks.
- Individual portable or Bluetooth telephone headsets will eliminate sharing of headsets and facilitate better hearing for telephone conversations when a face shield is worn.
- If comfortable, front desk staff can wear gloves if they are removed and discarded after handling patients’ transactions, such as payments and patients’ charts or other records.
- Front desk staff are required to perform hand hygiene before and after any contact with patients and every time gloves are removed.
- Front office staff are responsible for disinfection of any surfaces that the patient encounters prior to another patient approaching same area.

Schedule Planning and PPE Considerations

- Ideally, patients are screened outside of the reception room. Once granted entrance to the office, they should be immediately escorted to the treatment room.
- Consider staggering patient appointment times to reduce traffic in the office.
- Schedule patients who require AGP near the end of the day and do not use those treatment rooms until the next day.
- Consider the types of Personal Protective Equipment required and the time it takes to properly don and doff.
- Dental workers must use proper PPE when exposed to patients. PPE for aerosol-generating procedures differs from PPE for non-aerosol generating procedures, with higher respiratory protection required when dental devices, such as ultrasonics, rotary instruments or an air-water syringe, are used.
- OSHA recommends PPE for dentistry during the COVID-19 pandemic as detailed in the table below. Consult CDC recommendations and OSHA guidance 1 for PPE recommendations. (See Personal Protective Equipment). Also note that the California Department of Public Health advises dentists to postpone dental treatment for COVID-19 positive or suspected positive patients until their infection has resolved. For patients needing emergency care, CDPH guidance recommends palliative interim care or working with the patient’s medical provider to locate an appropriate location for dental treatment.
• Using an empty page from your appointment scheduler, plot out the kinds of procedures performed in a typical day.
• Calculate how much PPE will be used and if you have an adequate supply of PPE.
• Use the CDC’s PPE Burn Rate Calculator.
• Allow extra time for the following:
  ◦ Screening patients
  ◦ Changing PPE
  ◦ More frequent hand hygiene
  ◦ Disinfection of treatment rooms
  ◦ Disinfection of non-treatment areas
  ◦ Escorting patients in/out of the practice
  ◦ Re-processing instruments
• With all the above considerations, you can begin to set up patient appointments in your schedule. It is better to allow more time then you think is needed. If not enough time is scheduled, missteps in infection control may happen.

### Well patients

<table>
<thead>
<tr>
<th>Dental procedures not involving aerosol-generating procedures</th>
<th>Dental procedures that may or are known to generate aerosols</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Work clothing, such as scrubs, lab coat, smock or gown</td>
<td>• Gloves</td>
</tr>
<tr>
<td>• Gloves</td>
<td>• Gown</td>
</tr>
<tr>
<td>• Eye protection (goggles or face shield)</td>
<td>• Eye protection (goggles or face shield)</td>
</tr>
<tr>
<td>• Face mask (surgical mask)</td>
<td>• NIOSH-certified, disposable N95 filtering facepiece respirator or better*</td>
</tr>
</tbody>
</table>

### Patients with confirmed or suspected COVID-19

<table>
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</tr>
</tbody>
</table>
Staging the dental practice for physical distancing and safe patient flow

Interim Back-to-Practice Guidance

Patient Screening

☐ Request patients contact your front office upon arrival.
  • Post additional communication on the front door

☐ Post COVID-19 signage as required by city/county and CDC at front entrance (check local health department website for posting requirements)

☐ Direct the patient to the area where they will be greeted by a staff member and patient screening will take place

☐ Patients should be asked to perform hand hygiene and patients without masks should be given a mask

☐ Staff member responsible for patient screening should be wearing gloves, mask and eye protection

Supplies:

☐ Table and chair for staff member and shade structure if outside

☐ Patient screening form

☐ Laser or touch thermometer with cover

☐ Disinfectant wipes

☐ No touch trash can

☐ Clipboard

☐ Patient updated medical history and Consent Forms for today’s treatment

☐ Recommend all forms be completed electronically before visit

☐ Pen (disinfected when handed to patient); consider gift pen

☐ Masks

☐ Gloves

☐ Hand sanitizer

Notes:

Consider setting up a laptop / tablet with Wi-Fi and a connection to the practice’s Patient Management Software. This will allow the staff member to check the schedule, check the patient’s chart, and send a message the staff in the front office when the patient has been cleared to enter the practice.
Patients who pass screening and will proceed to care should be directly escorted to the treatment room. If administrative business is required prior to treatment, patients should be escorted to consultation or front office area as appropriate.

Reception Area

- Stage reception room furniture 6 feet away from front desk. Tape off seats that are connected to ensure the 6-foot distance between patients in the area. Inform patients that the goal is to minimize their exposure to other patients, and thus, lingering in common spaces will not be permitted. (i.e. a line at the restroom, a line to check-in or check-out).
- Post signage from CDC on how to stop germ spread, hand washing, and COVID-19 symptoms
- Remind patients to wear their mask at all times outside of treatment room
- Remove all magazines, reading materials (including patient brochures/handouts) and children’s toys
- Consider having one staff person as a designated “floater” responsible for the additional cleaning and decontamination that is required with COVID-19.

**Supplies:**

- Tissues
- Hand sanitizer
- No touch trash can

**Notes:**

Patients should not be allowed to congregate in the reception area. If a screened and masked patient cannot be escorted directly to the location for service (e.g. treatment, consultation or front desk), they should wait in their car until the appropriate location becomes available.

Staff Area

- Establish start of day/end of day protocol for clinical staff for donning/doffing scrubs, shoes, etc.
- Establish staggered seating or work schedules to allow for physical distancing
- **Employee screening for COVID-19**

**Supplies:**

- Appropriate PPE based on roles/treatment scenarios (N95 masks, surgical masks, face shields, eye protection, gowns, head cover, shoe covers)
- Hand sanitizer
- Disinfectant Wipes
- No touch trash can
- Single use utensils/plates/napkins
Treatment Rooms

- Align patient scheduling and operatory use with planned treatment
- Consider modifying practices and use of office space to manage aerosols from aerosol-generating procedures (AGP). Options to consider include:
  - Using a room with a closed door for AGPs
  - Scheduling AGPs at the end of the day
  - Placing plastic or acrylic barriers between operatory chairs if open floor plan; leave open chairs between scheduled patients
  - Using best practices for aerosol reduction, including HVE, rubber dam, other engineering controls for AGP management
  - Covering items in the treatment area (Zones 1-3) that are difficult to disinfect later, including such things as glove boxes and computer screens
  - Keeping drawers and cabinets closed during treatment
  - Setting out supplies and materials in the amount required for scheduled care
  - Utilizing non-treatment personnel to retrieve equipment, materials or supplies from outside treatment area and deliver to treatment personnel

Supplies

- No touch trash cans
- Disinfectant wipes
- Tissues
- Hand sanitizer
- Foot-operated PPE receptacles (one for cleanable PPE, one for disposable PPE)
- Pretreatment viricidal mouth rinse (optional)

Front Desk

- Set up front desk disinfecting station with gloves, surgical masks, disinfecting wipes, and hand sanitizer. Assign a front office staff to stock this area and the patient screening area every morning.
- Install a clear plastic barrier (sneeze guard) if feasible at front desk where patient encounters occur. If not feasible, front office personnel can wear goggles or face shields in addition to a mask.
- Consider using individual portable or blue tooth telephone headsets if feasible to reduce sharing of telephone handsets and facilitate telephone conversations when face shields are worn
- Use keyboard covers that can be wiped down
Perform hand hygiene before and after each patient encounter. If gloves are worn, hand hygiene should be performed after gloves are doffed at the completion of patient contact.

Disinfect surfaces that the patient contacts prior to another patient approaching the same area.

**Supplies:**
- Keyboard cover
- Gloves
- Surgical masks
- Disinfecting wipes
- Hand sanitizer
- Tissues
- No touch trash cans
- Sneeze guard or face shields or goggles
- Consider keeping prepackaged OH take-home product bags at front desk

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**Administrative Patient Services**

Patient arrivals, flow and dismissals should be managed so that patients do not congregate at the front desk waiting for staff to assist them.

Considerations for front desk efficiencies include:

- Have enough personnel on duty to accommodate patients and incoming telephone calls.
  - Consider using an answering service or answering machine to take calls to reduce staff multi-tasking at front desk. Patient Communication Systems (Weave, SolutionReach, DemandForce) often have the capability to send a customized text message to the patient informing them that you are sorry you missed their call and will call them back shortly.

- Front office personnel can post charges and have a walk out statement ready for the patient upon completion of treatment.

- If a treatment plan or financial arrangements need to be prepared, have the patient remain in the treatment chair if schedule permits, until the treatment coordinator has prepared the treatment plan or estimate and is ready to present to the patient. If this is not feasible, have the patient wait in a consultation room or other unoccupied area while this paperwork is completed.

- Consultations should take place in a room designated for that purpose and in compliance with physical distancing. If the room designated for this purpose is too small, and patient scheduling permits confidentiality, consultations may take place in the reception area.
☐ In scheduling the next appointment, front office personnel should have a couple of appointment times pre-selected in advance for the patient to choose from.

☐ If more information is needed (i.e. insurance benefits) before the patient can schedule next appointment, call the patient when the information is available to schedule.

☐ If possible, have only front office staff use the credit card terminals. If the patient accesses the credit card terminal, disinfect after each patient use and disinfect the counter around the terminal.

Patient Restroom

☐ Staff, wearing gloves and a mask, should clean dental office restrooms following patient use, disinfecting surfaces and door and faucet handles.

☐ Post CDC handwashing poster

☐ Clean and disinfect public areas frequently, including door handles, chairs and bathrooms located outside of the dental office but frequented by patients.

**Supplies:**

☐ No touch trash can

☐ Liquid soap in dispenser

☐ Paper towels

☐ Disinfecting wipes

☐ Tissues

General Patient Traffic (Hallways / Entrance / Exit Flow)

☐ Develop patient flow diagram to support physical distancing. If possible, direct patient traffic in one direction to enter reception room, exit reception and enter treatment area, exit treatment area and continue to front office prior to exiting office.

☐ If one-way traffic is not possible, consider setting up a course of travel that abides by social distancing.

☐ Consider using plastic shoe prints or arrows to help establish office traffic pattern.

See sample practice diagram for more staging guidance.
Sample Practice Diagram

Patient Traffic Patterns: Covid-19

This visual guide is meant to assist with the planning of patient flow in a dental practice. It is provided for informational purposes only and should not be construed as legal advice or recommendations. There is no guaranty that the content represents all federal, state, and local elements for social distancing that may be required. Dentists are responsible for ensuring compliance with federal, state, and local laws to mitigate any transmission of COVID-19 and other infectious diseases.