



Starting and maintaining an OMS practice

Starting and running a successful OMS practice requires organization and a dedicated team.

Starting a new practice

For both new and experienced OMSs, starting a practice may seem like a daunting task without the appropriate resources and support from the right team of experts. The following is a basic breakdown of the tasks to consider when starting a new practice.

■ Site selection and building

Working with a real estate agent who specializes in healthcare can help you get started on finding the perfect spot for your practice. You may consider renting or purchasing a building that previously housed an OMS or similar practice to lower renovation or building costs. Be sure to work with certified professionals for any constructions or renovations you undertake.

■ Insurance and finances

You should obtain legal counsel and seek guidance from financial advisers for matters such as securing practice financing, adhering to IRS and other financial requirements, and executing an essential contract review. Practicing OMSs should familiarize themselves with payer contracts and requirements to ensure optimal reimbursement, and new OMSs should be sure to secure their National Provider Identifier (NPI) number. To protect your practice from risk, review and obtain necessary insurance policies, such as malpractice, liability, property, disability and workers compensation. AAOMS partners with OMSNIC for malpractice insurance and Treloar & Heisel for disability and other insurance products.

■ Products and services

When seeking products and services to enhance practice operations and fulfill business needs, consider working with AAOMS Advantage Partners. These select companies have demonstrated a commitment to the OMS specialty, providing AAOMS members with exclusive discounts and benefits through their individual AAOMS Advantage programs. Visit AAOMSAdvantage.org for additional information.

Additional vendors are listed in the AAOMS Supplier Marketplace, found at AAOMSSuppliermarketplace.com. While AAOMS does not make recommendations on any companies featured in the Marketplace, this listing may help

you locate products and services that can help you run a successful practice.

■ Clinical requirements

Dedication to patient safety and providing high-quality care are paramount to running a successful OMS practice. Secure all required state and federal licenses and permits – such as a dental license, anesthesia permit and DEA registration – and comply with all requirements regarding renewal and displaying such information within your practice. AAOMS now offers online courses complimentary (through Dec. 31) to members to help them meet the new Medication Access and Training Expansion (MATE) Act training requirements for DEA registration and renewal.

Additionally, ensure all clinical staff obtain their BLS/ACLS/PALS certifications. Find upcoming available opportunities at AAOMS.org or visit the American Heart Association at CPR.Heart.org for additional training locations.

■ Regulations and compliance

Prior to treating patients, practices must implement an effective compliance plan to meet federal and state regulations. To maintain patient and staff safety, the practice must provide annual bloodborne pathogens training as required by OSHA and ensure all clinical staff have received the Hepatitis B vaccine or signed a declination waiver. Practices also should follow CDC infection prevention and control guidelines and recommendations.

■ Hiring and onboarding

You will need to hire staff before opening your practice, although exactly how many and what type of staff you need will depend on your practice's size, services offered and patient load. Members can post or search for opportunities using the AAOMS CareerLine website or submit an advertisement to the AAOMS Today classifieds. Ensure all employees complete an I-9 Form upon onboarding.

■ Marketing and social media

Determining the practice name, logo and branding strategy are all quintessential elements of opening a practice. Once these steps have been completed, you should consider developing an advertising and marketing plan, perhaps with a professional in the healthcare marketing field.

Today's patients are internet-savvy and desire informative, attractive, accessible and easy-to-navigate websites, so consider hiring a web design team to either create or redesign the practice website. Improving communication
continued on next page

with other practitioners in the community also can help develop a strong referral network to increase the practice's patient base.

Social media is another interactive marketing avenue, and AAOMS's Social Media Guide provides helpful guidance for developing a social media presence. The guide is available at AAOMS.org/member-center/informational-campaign/social-media-guide.

Practice checklist

To keep operations on track, members can tailor AAOMS's Practice Start-up Checklist to meet the needs of their practices. By delegating responsibilities to the appropriate staff and following a structured task list of timely reminders, what was overwhelming initially can become organized and manageable.

The following lists contain tasks to consider implementing in established OMS practices.

■ Annual tasks

- Review educational opportunities and resources for practice staff. Register for continuing education courses, meetings and purchase any new or updated coding books and compliance manuals.
- Renew all memberships, licenses, registrations and permits – including AAOMS OMS and allied staff memberships, dental license, DEA registration, X-ray registration and anesthesia permit.
- Complete any necessary annual staff training requirements, such as HIPAA, OSHA, BLS/ACLS/PALS and any other state-specific requirements.
- Perform equipment maintenance.
- Secure or renew insurance policies, including liability, malpractice and property insurance.
- Review all payer contracts and fee schedule updates.

■ Quarterly tasks

- Conduct employee reviews/appraisals and engage in team-building initiatives, being sure to reward excellence.
- Perform emergency mock drills. For advanced training, OMSs can participate in an Office-Based Emergency Airway Management (OBEAM) course and staff can register for AAOMS assistant courses such as Advanced Protocols for Medical Emergencies in the OMS Office, the Anesthesia Assistants Skills Lab and Anesthesia Assistants Review Course.

- Review product warranties, including renewal options.
- Review all practice incident reports, being sure to initiate any necessary corrective action.

■ Monthly tasks

- Conduct a medication expiration audit.
- Perform crash cart maintenance.
- Run a month-end report – including production charges, adjustments, collections and accounts receivable – and review referral marketing activities.
- Check for state and federal regulatory changes for the OMS office and staff.

■ Semimonthly tasks

- Perform necessary software updates and cybersecurity maintenance.
- Check inventory and order supplies, while maintaining a log for any recalls by checking the FDA Medical Device Recalls Database.
- Execute payroll for practice staff, being sure to comply with all federal and state regulations and any contractual obligations.
- Dispose of bio-hazardous waste, depending on the practice needs.

■ Weekly tasks

- Conduct extensive office cleaning, following appropriate infection control protocols and performing biologic sterilization testing.
- Organize office forms and brochures.
- Send out patient satisfaction surveys.
- Update social media platforms as needed.
- Hold a meeting with the OMS, practice manager, marketing team and administrator to discuss business.
- Call, email or text patients with upcoming appointment reminders if not using an automated system.

A complete list of one-time and routine tasks can be found at AAOMS.org/practice-resources/starting-a-practice. ■

The content of this article is provided for informational purposes only. It is not intended as legal advice.

Please consult your attorney regarding professional ethics, regulations and codes of conduct or your accountant or other financial consultant on financial matters.

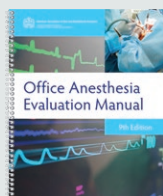
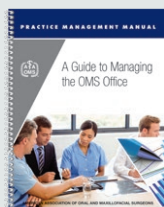


AAOMS offers practice management resources

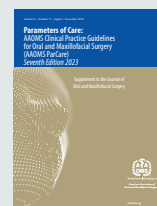
AAOMS members have access to a variety of practice management resources through the AAOMS Store and the AAOMS CE Online Library that support running an OMS practice.

The AAOMS Store offers an assortment of products and publications for busy OMS practices, covering topics of compliance, practice management, clinical and more. Visit AAOMSstore.com to purchase products. Practice management resources include:

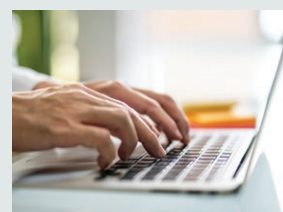
- **Office Design and Construction for the Oral and Maxillofacial Surgeon** – Supplies valuable insight for determining site selection, choosing the right architect for your project and obtaining necessary permits.
- **Practice Management Manual: A Guide to Managing the OMS Office** – Provides practical guidance across the complete range of practice management topics for OMSs and staff to help the team keep tasks on track and navigate the complexities of running an OMS practice.
- **Office Anesthesia Evaluation Manual** – Essential resource for all staff involved in anesthesia management, covering a wide range of valuable information to ensure safe and high-quality anesthesia care.
- **Complete HIPAA Compliance Plan and Guide and Model Medical Practice OSHA Exposure Control Compliance Plan and Training** – Offers comprehensive information on meeting federal HIPAA and OSHA requirements for OMS practices, with staff training modules and templates available for use.



- **Model Medical Practice Personnel Policy Manual Compliance Plan** – Includes sample templates and onboarding resources to help simplify the human resources aspect of practice management.
- **Parameters of Care: AAOMS Clinical Practice Guidelines for Oral and Maxillofacial Surgery** – New 7th Edition reflects updated practice considerations for 11 scopes of practice.



The AAOMS CE Online Library offers OMSs and their staff a variety of learning opportunities. Available practice management courses include:



- “Making Dollars and Sense of Your Financials”
- “Cybersecurity – What’s the Cost of Doing Nothing?”
- “Instrument Processing: Step-by-step with Quality Assurance Systems”
- “Utilizing Social Media to Optimize Your Practice’s Marketing Strategy”
- “Needlestick and Sharps Injuries: Risks, Management and Safety Protocols”
- “Benefits of Proper Employee Selection: Recruiting, Hiring, Training and Incentivizing Valuable Employees”
- “Build a Team that Rocks”
- “Bringing on a New Oral Surgeon”



This is number 194 in a series of articles on practice management and marketing for oral and maxillofacial surgeons developed under the auspices of the Committee on Practice Management and Professional Staff Development and AAOMS staff. Practice Management Notes from 2002 to present are available online at AAOMS.org.

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