



8th District Bulletin

Volume 60 | Number 4 | Winter 2024

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8th District BULLETIN

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The Dental Society is organized for the purpose of encouraging improvement of the health of the public, to promote the art and science of dentistry, and to represent the interests of the members of the profession and the public which it serves.

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FROM THE EDITOR

The American Dental Association is on the verge of becoming irrelevant. Its market share of members is at 57%. If it falls below 50%, the organization runs the risk of becoming a non-entity in the political world. Membership in the ADA has fallen for the last 15 years. Trends continue to indicate it will continue to lose market share if there isn't a dramatic turnaround in attracting new members. I have written about membership in the ADA before and how important membership has been in my life.



I wrote about it in 2007 when the Eighth District came to my rescue after I suffered a heart attack and was unable to practice for a while. When I suffered the heart attack, my wife, Danielle, immediately called Mr. David Kinyon, then the Executive Director of the Eighth District, to tell him the news. David immediately contacted orthodontists in the District to see who could and would cover my practice while I convalesced. Without the connections I made because I was a member of organized dentistry, I don't know what would have happened to my practice. But those connections were there, and my practice was saved.

Belonging to organized dentistry is a very important part of my professional life. The ADA, NYSDA, and the Eighth District

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FROM THE EDITOR

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have always been there when I needed them the most. I receive most of my continuing education through their auspices. I have my malpractice insurance through our endorsed vendor, Fortress Insurance Company and Walsh Duffield. For me, without organized dentistry, receiving those benefits would be more difficult to obtain and a bigger headache obtaining them.

Why is membership declining at such a horrific rate? Younger dentists are not joining at a rate sufficient to counteract the number of retiring dentists. The number I have seen is 49% of younger dentists are joining organized dentistry.¹ That is a very dismal number which, if it continues, will lead to the ADA becoming irrelevant in the political realm. Politicians only listen to groups who represent a majority of members. The ADA has a strong voice nationally, NYSDA has a strong statewide voice, and the Eighth District is strong locally. This voice was most recently heard in the effective campaign to reintroduce fluoridation into the City of Buffalo's water supply. Without impressive numbers of members, these politicians may not have listened to our arguments, and Buffalo's water supply would have remained fluoride free. This would not have been beneficial to the population of Buffalo, particularly those children who would be most adversely affected.

Membership goes far beyond just political action. NYSDA has a 39-page guide of all the benefits membership bestows. Advocacy is likely the most important benefit. NYSDA has a very capable lobbying effort in the legislature of New York State. They have represented dentistry over the years very well and we are fortunate to have such a successful lobby. NYSDA offers its members a membership concierge who is available to answer members questions and to address any particular needs of members. There is a legal services panel available to members for legal advice on dental matters including matters relating to issues with OPD, Medicaid, contract analysis, entity creation and practice sales, and commercial litigation. For these services, members receive a free consultation and a 10% discount on later fees. Another important benefit is the Peer Review process available to members. Through NYSDA's Peer Review and Quality Assurance Program, members are afforded a confidential and impartial way to resolve complaints about dental treatments. Peer Review helps resolve conflicts between patients and dentists without attorneys becoming involved. NYSDA just introduced CE Navigator where members can keep track of their continuing education hours. This replaces the method by which members were able to submit their courses online NYSDA used previously. This is just an abbreviated list of the benefits available to members.²

The Eighth District is the third leg of the tripartite of the ADA. The District serves the eight counties of Western New York. The District provides many services to its members. It participates in Peer Review, as mentioned above, it has an endorsed vendor for malpractice insurance, and it provides continuing education to its members. There are two all-day meetings, one in the spring and one in the late fall. The William Knauf Memorial Golf Tournament is held every June, which also has a continuing education component. Also in June is the annual Shred-it day, where members can bring anything of sensitive nature. In conjunction with the Erie County Dental Society, it offers quarterly CPR courses so members can stay current with their CPR requirement for licensure. The District also lobbies politically if there is something dentally related concerning the public. A perfect example is the recent fluoride incident and the previous lab restriction bill proposed by the Erie County Legislature. The District advocated on behalf of the dentists and citizens to the betterment of our society.

Other reasons younger dentists don't join can be found in the changing models of dental practice. Gone are the days of solo practice. Most recent graduates are not interested in a solo dental practice. They seem to want to belong to a group practice with multiple dentists, be it a group practice of like-minded dentists, or a corporate owned practice. Since most recent graduates leave school with an unbearable student loan debt, these dentists want and need to be involved in a practice where they can make a significant salary to help defray those loan payments. These people don't

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FROM THE PRESIDENT

Dear Colleagues,

It may be the end of October but within organized dentistry it feels a lot more like spring. As I write this, on my way home from the ADA House of Delegates meeting 2024 in New Orleans, new things are sprouting at all levels of organized dentistry. Your ADA has gone through some transformative changes that are sprouting forth from the rich earth tended by the hard work of all the dedicated volunteer Dentists who toil on your behalf, fertilizing the ground with their enthusiasm and love of the profession. The ADA today is on much firmer financial footing due to the sale of the headquarters building in Chicago coupled with the leasing of new quarters in another building. The proceeds of this sale have been used to bolster the reserves of the organization, allowing for the passage of the resolution the other day to keep dues at their current level. Along with this, there is the trial program started in several components which rolls out a new dues structure, dramatically reducing dues for our newer members. This program will reduce dues to the members, but also reduces dues revenue to the State and District components. The ADA is using the benefit of their reserve funds to back fill these losses in the first few years while the program gets off the ground and sprouts.

The next bud springing forth at the national level is the strategic forecasting model coupled with Fontiva and Salesforce which will fuel the growth of non-dues revenue. Looking to the future the ADA envisions less reliance on membership dues to fund the organization, something we can all cheer about. Another bright spot of new growth is the new ADA Forsyth Research Institute which has dramatically increased the amount of research dollars being applied to basic science and clinical research. At the state level your NYSDA delegation to the ADA House of Delegates successfully achieved passage of the workforce resolution passed at our state HOD meeting this past spring. This resolution brings with it \$300,000 in funding to enable the ADA to put together a comprehensive, easily searchable collection of information and media that all components of the tripartite can use for outreach programs encouraging students to enter into the profession at either the Doctoral or Allied Professional level. This is a program that will directly address one of the biggest concerns of member Dentists, the workforce shortage. This resolution came to life through the tremendous hard work of our ADA Delegates, again fertilizing the soil with selfless dedication. In the 8th District new things are sprouting as well. With the efforts of our local members and especially our Executive Director Dr. Craig, in partnership with the media and other affected parties, we have finally seen the Fluoride being added back into the Buffalo water supply. Helping to keep the growth at the 8th District going, Dr. Craig has agreed to a three-year extension of his contract, ensuring the continuation of his exemplary stewardship. We are also seeing new growth from our mentor program which has begun their presentation series to the Dental Students. Finally, the other area that reminds me of spring and new growth sprouting roots, is the continued collaboration and networking with our colleagues from around the nation. New friendships and partnerships supporting each other in our common goal to strengthen the ADA and the profession we love.

As I come to the end of my year as President of the 8th District, I hope that the job I have done will be the fertilizer that encourages our younger members and future members to become involved in organized dentistry and add further to the strength of the profession. Again, a bit of spring in October/November.

Robert Bochiechio DDS
President 8th District Dental Society.





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EXECUTIVE DIRECTOR'S NOTE

First off, I want to thank the Executive Council Leadership, current, pending, and past Presidents of the Society Drs. Bochiechio, Rumfola, Hutter, Gambacorta and Craddock for extending my employment contract for another three-year term. I am grateful not only to them, but Council members, and my staff Dana Skinner and Kari Hicks for their ongoing support in our work. Without them, a lot of what we do, doesn't get done; thank you. I hope the membership has been pleased with my work and if you want to explore ideas and or express an opinion or ask for support, that's my role as your Executive Director.

As of my writing the ADA HOD is gathering in New Orleans for the annual meeting. Our representatives are working along other NY delegates determining important policy changes and directions that the ADA will be taking under the leadership of new President, Dr. Brett Kessler from Colorado. Our District Trustee, Dr. Brendan Dowd also has his timely newsletter in this publication to provide updates to the forward leaning changes to the national vision of the new models of engagement the ADA is working on. From a new membership portal and database management system, to new models of membership and dues, as well as forthcoming ADA Credit Union sometime in 2025. While all these changes are necessary, they bring with them a different mindset in terms of how business is done. Some of this change may appear to be odd to our longstanding members and those transitioning to Life Member status.

In NYS, our overall membership remains consistent, but the cliff in retirement-age members is looming just a few years down the road. We expect to hit the cliff in 2028-29, which for some isn't a long time from now, but our focus needs to be on younger dentists and converting their interests in organized dentistry and staying active members and contributors to Society efforts. These will be in committee work at both the local and state levels as well as taking a role in outreach and support of programs and services. There is a wind of change slowly forming on the horizon and requires that we meet any resistance with equal opportunity and a vision of dental support that new dentists need.

As we head into 2025, there are still many great events happening in our community. We have Dentistry Smiles on Veteran's at UBs Clinic on November 2, 2024; our Fall All Day Seminar on Friday, December 6th; the annual and festive Holiday Family Breakfast on Saturday, December 7th at Transit Valley CC. In early 2025, we are combining the President Installation events into one President's Reception for 8th District and Erie County leadership on Saturday, January 25th at the Roycroft Inn. We hope you take advantage of these professional and social gatherings to support colleagues and our collective union as members.

Finally, in 2025 the Foundation will be seeking donations to support various causes and outreach efforts to groups and communities. At the August Retreat, the Foundation Board met to redefine the nature and work of our Foundation. Founded and established in 1952, for 72 years the entity within our Society is charged with supporting various interests and causes while allowing the Foundation to collect donations, grants and other means of fundraising to support outreach and education. Look for a new feature in the Bulletin today called the Foundation Corner for more details. I want to wish all our members, their staff and families a healthy, safe and joyous holiday season ahead. Hope to see or hear from you soon.

As always, if you have a question, concern or issue to resolve, and we can help, we are here to assist you and your staff. Contact me at jcraig@8ddsny.org or call 716-995-6300.

NEW DENTIST SPOTLIGHT

Introducing Dr. Nina Olivieri, DDS!

Dr. Olivieri is a WNY native, whose hometown is Clarence, New York. She earned her Bachelor's Degree in Biology from St. Lawrence University in 2015. Dr. Olivieri attended SUNY at Buffalo School of Dental Medicine, graduating with her Doctor of Dental Surgery Degree in 2019. Following her pre-doctoral studies, Dr. Olivieri completed a General Practice Residency (GPR) Program at the Denver Health Medical Center in Denver, Colorado.



Dr. Olivieri is currently practicing as a general dentist at Clover Leaf Family Dentistry in Lockport, NY. She loves that she practices in an office with a bright, hardworking staff who share the common goal of providing the best patient experience possible. As a former athlete, Dr. Olivieri remarked that she genuinely appreciates the team atmosphere that her current job highly values and that the owner of the office gives her the independence to lead, while also providing the necessary support to offer their patients the best possible care.

Dr. Olivieri is an advocate of lifelong learning and organized dentistry. She is a member of the Fonzi Dental Study Club, the American Dental Association, the New York State Dental Association and the Eighth District Dental Society. When asked what she loves about her profession, she replied: "I enjoy general dentistry because of the vast variety of procedures. As my interests develop throughout my career, the opportunities are endless."

After Joining the workforce, Dr. Olivieri quickly understood that education never stops; she is committed to a lifetime of learning. Her professional goal is to create relationships with both her fellow colleagues and her patients for years to come as she continues to hone her skills. Her advice to New Dentists is to establish relationships with specialists and other dentists that support your growth as a provider. For much of her work experience, she has been the only dentist in the office. However, she stated that "thanks to our warm dental community, I have never felt alone".

When she is not providing care to patients or participating in continuing education, Dr. Olivieri spends her time hiking, traveling, enjoying live music, cheering on the Buffalo Bills and spending quality time with her husband Mitch and their cockapoo, Emma.

Congratulations to Dr. Nina Olivieri on being featured in our 8th district bulletin "New Dentist Spotlight!" We are fortunate to have new member dentists like you in our community. If you know of a new dentist who you feel should be featured in an upcoming "New Dentist Spotlight," please e-mail your nomination to econley@buffalo.edu

Evan Conley, DDS

Chair - Committee on the New Dentist

Established in 1952, the EDDS Foundation has played an important role in the development of programs and services to not only our members, but to students, the community, and those in need to dental care and support. We are embarking on our 73rd year of support, and we need to continue to utilize this special entity status as we move into the future of organized dentistry.

The purpose of the Foundation's creation was to establish a non-profit entity to allow donations, sponsorship, and prospect grants to be tax-exempt from fiscal instruments to support the ongoing work of outreach, education, and community engagement. Over the years, funding was traditionally raised through member donations supporting those members who had passed on. In turn, those donations could be made to support targeted outreach or assist the Foundation to grow its endowment to enrich programming.

For many years, Continuing Education became the lifeblood of fund development building where the costs of participating in workshops and seminars was made to the Foundation, and in turn, it would secure the necessary means to support various events on behalf of the membership. For many years, CE enrollments allowed the Foundation to grow over time and while the efforts were important, more support would come in the form of endorsements and sponsorships. Endorsement funding then was used to create the Eighth District Service Corporation, but its usefulness had been in decline, so it was discontinued in 2022.

As the Foundation evolved, the need to create restricted funds was established so that targeted funding could be utilized in the manner under which the fund was created for. Examples of such funds were the Dental Relief Fund, used to support any hardship of member practices (e.g., fire, flood, natural disaster, illness) or life struggles, and the committee could designate a specific amount of funding to be released to the member to ease that difficult time. In 2009, a Dr. Richard (Rick) Fink Memorial Fund was established and used to support the Fall All-Day CE Lecture. The fund was established through both member contributions as well as corporate donations in his memory. The initial fund was \$33,500.00 and remains very much in good shape as we move to host the 16th Annual Lecture on December 6th this year at Salvatore's. In 2023, the Dr. Marshall Fagin Fund was created to support the Spring All-Day Lecture in his name with a large contribution from the shutdown of the Metropolitan Study Club.

The Foundation Board held a Retreat in August and established new goals, initiatives, and outreach efforts for 2025 to enlist the support of our membership and change perhaps the nature of our Foundation work. Here are some highlights:

- A membership drive for donations to target various Foundation programs and services
- More brand awareness of Foundation work in the community and through membership
- Non-dental related outreach in the community that families can support – Days of Caring, etc.
- More information to the membership on what the Foundation is & does for members?

We hope this new page in the Bulletin and as part of some Weekly Updates will help inform the membership on the value of having a Foundation and what that allows our Society to do for others.



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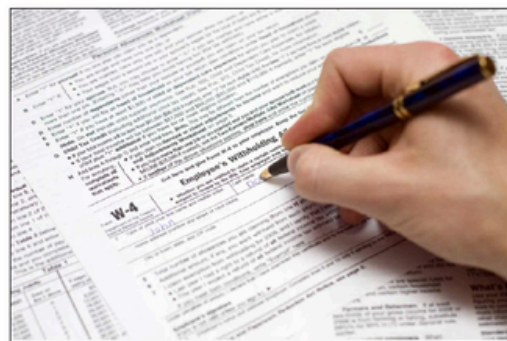
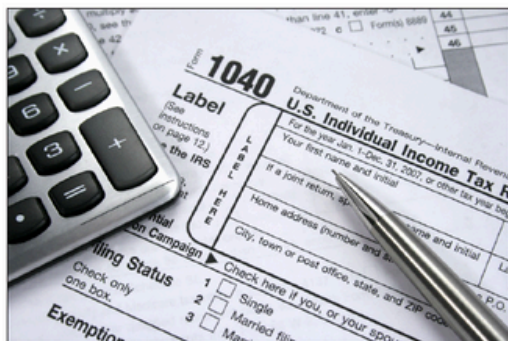
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Erie County Dental Society



Photo taken by Dr. Cryan

The Groove

The ECDS would like to celebrate and congratulate members who are making great dental moves in Erie County! If you have exciting news about your dental practice that you would like to share with your peers, please email jcraig@8ddsny.org and place subject title "ECDS The Groove".

Congratulations to our members in the groove and making moves in our dental community!

Dr. Amber Shay has opened her practice, Amber Shay Dental, at 3951 Main Street in Eggertsville. 716-836-5252. Dr. Shay took over the practices of Dr. Patricia Haberman, Dr. Mira Edgerton, and the late Dr. Fadi Ayoub. Currently, Dr. Haberman and Dr. Edgertpm are faculty members at the University of Buffalo Dental School.

Dr. Samantha Smith has opened her practice, Queen City Family Dentistry at 31 Maple Road in Amherst. 716-635-9657. Dr. Smith took over Dr. Douglas Hamil's practice, and at this time Dr. Hamil has retired.

Dr. Cha Vu has opened her practice, Delaware Avenue Dental at 2982 Delaware Ave in Kenmore. 716-875-4243. Dr. Vu took over Dr. Mark Danziger's practice, and at this time, Dr. Danziger has retired.

Dr. Gerald Carlo has merged his practice, Gerald T. Carlo DDS General & Cosmetic Restorative Dentistry, with The Buffalo Dental Group at 6600 Main Street in Williamsville. 716-634-3055. Dr. Carlo is practicing now at The Buffalo Dental Group.

Please call the office at 716-995-6300 to learn more. For our CE's, office staff are always welcomed to join in the fun, too! For the social hours, come have a drink and enjoy seeing friends.

November 6 – Member Social Hour and Meeting @ Buffalo Niagara Dental Meeting upstairs @ 6pm

January 25 – President's Installation at Roycroft Inn in East Aurora @ 6pm

The To Do's with Dues

WE ARE ALWAYS LOOKING FOR DENTISTS TO JOIN OUR BOARD. PLEASE CALL THE 8TH DISTRICT OFFICE IF YOU'RE INTERESTED! Did You know that a few years ago the ADA changed the way dues are paid? When you pay your ADA dues, it includes your NYSDA and 8th District dues and is called the Tripartite. Under the Tripartite structure, your local dental societies, like Erie County Dental Society and Niagara County Dental Society, need to bill members separately. So in the winter, when you are reviewing your annual dues, this is why you now receive a separate bill from your local dental society. Why is it important to be a member of your local dental society? It is a great way to fill in needed CE credits, but more importantly it is a great way to feel and be connected to your local dental friends. It is a nice reminder that you have dental colleagues who understand your day to day stresses and victories. It may also be a place to help solve a dental question you may have. Did you know the ADA is working on a new membership dues system? Find out more about it on the new ADA website, www.ada.org, or keep an eye out for your ADA emails.



Amanda Cryan
2024-ECDS President

Trustee's Corner - September 2024

Sixth letter from the ADA Trustee to the NYSDA Components

Greetings New York State Dental Association members. Thank you for continuing to support our great profession of dentistry, as well as organized dentistry. I hope everyone and their families enjoyed this past summer. As many of you have heard, the American Dental Association has sold the building at 211 E Chicago Avenue in Chicago, Illinois. By way of history, the ADA bought the land at that site from the American Red Cross and built the current building in 1965. The new owners are the Ann and Robert Lurie Children's Hospital, which has their main headquarters next door. They rented four floors in our building for many years. We were also able to agree to rent from them while leasehold improvements are done at our new location.

Our new headquarters will be located at 401 N Michigan, approximately a half mile from our previous location. We will occupy the top four floors of the building, floors 32-35. The leasehold improvements will be completed by early 2025 and we will move in right after. I was fortunate enough to have a tour of the facility in August. It is the perfect amount of space for our needs today. Approximately 70,000 square feet split between the four floors will be specifically built out for our volunteer member and staff needs. The view from all these floors is spectacular. You get a bird's eye view of the Chicago River, Lake Michigan, the Chicago Tribune and NBC buildings, as well as downtown Chicago. There are several excellent hotels right near our location, including the Sheraton and Regency.

There is also conference space to use on the 19th and 25th floors. In addition, there is a large conference center, the Gleacher Center and owned by the University of Chicago Booth School of Business. We will be able to lease it with planned events and large meetings. It reminds me of the Hillenbrand Auditorium on the second floor at the ADA building.

Ultimately, the ADA will be rightsizing to the exact amount of space needed for today. All our scientific laboratories will be in Boston, Massachusetts and many of our employees work from home or on a hybrid schedule. The ADA needed to right size its headquarters and these deals provided the perfect avenue for it. We also feel Lurie Children's Hospital was the right buyer who will have even more success continuing to carry on the tradition of providing local citizens with excellent health care.

Incidentally, the leased premises for our ADA Forsyth Institute (AFI) will be completed by the spring of next year. We are occupying approximately 76,000 square feet in a beautiful building in Somerville, a suburb of Boston. We have increased our grant amounts for 2024 to \$36 million dollars, with \$10 million of that coming from NIH grants. The synergy from this merger between the ADA and the Forsyth Institute has been incredible. Plans are in the works to take the capacity of the ADA Seal Program to another level. The demand is there for more consumer products looking for the Seal approval and the new labs will give us the means to achieve it. The AFI Certification Program, recently approved by the ADA Board of Trustees, will be introduced in the beginning of next year to approve specific dental products that dentists use in their office. The AFI feels there will be a strong demand for this certification program for dental manufacturing companies to meet the test of the program. Our members need to know which dental products on the market have been certified to do the things they profess.

On another note, the ADA just completed filing an amicus brief with the US Supreme Court concerning the Employee Retirement Income Security Act (ERISA). We are hoping this contributes to solving the confusion that certain dental insurance companies can claim they are under ERISA instead of state law and regulations. In general, some insurance companies, especially self-funded ones, proclaim they are immune from state insurance laws and regulations due to ERISA exemptions. Two different circuit courts, the Eighth and the Tenth, have given conflicted rulings on this very important issue. The ADA and several other health associations feel the Supreme Court needs to settle this area of law. We are hoping they decide in our favor sometime early next year.

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It is really an exciting time for the ADA. With brand new headquarters and a new science laboratory location, it is indeed a time of change and implementation at the American Dental Association. As your second district trustee, I am humbled and proud to be part of the decision-making process in these historic times. I know I will see some of you at our annual meeting in New Orleans this October. We will be deciding critical issues as part of the House of Delegates. SmileCon will be celebrated right before our deliberations, and I hope many of you can come to NOLA to participate in some wonderful continuing education and meet up with many of your colleagues. As always, I would be happy to share more details with all the new ADA developments at the meeting or you can contact me by phone (716-510-3217) or email (dowdb@ada.org). Thanks again for being part of organized dentistry.

Sincerely, Brendan

Brendan Dowd DDS
ADA Trustee, Second District

EDDS Represents at HOD in New Orleans – 2024

ADA House of Delegates for the Eighth district met in New Orleans for the annual meeting, which took place on Friday, October 18 thru Tuesday, October 22nd. Outgoing ADA President Dr. Linda Edgars gave her farewell speech to the Delegates and guests on Monday. Here are some her highlights from the past year:

- Launching the ADA Forsyth Institute, which merged the ADA Science & Research Institute and the Forsyth Institute in Boston, MA.
- Holding the largest ADA Dentist and Student Lobby Day in Washington, D.C. More than 1,200 students and dentists advocated on Capitol Hill.
- Pushing for more transparency in premiums through dental loss ratio legislation and lobbying for ERISA reforms to stop insurers from ignoring state patient protection laws.
- Tackling student debt by advocating for legislative relief, and starting a task force to explore reducing dental school tuition.

“Our new dentists need to understand that the ADA protects their investments and freedoms to treat their patients as they want them to be treated. As I approach the end of this presidency and the later part of my life, I’ve come to realize, trophies and accomplishments are nice, but what really matters is making a difference and helping someone when they need you the most.”

On Tuesday, October 22nd, Dr. Brett Kessler, Colorado, was sworn in as the 161st President of the ADA. Dr. Kessler has a well-known and shared history of struggling with substance abuse issues and health and wellness. One of his initiatives this year will be to highlight the struggles and stress dental professionals face in their lives and provide support mechanisms for coping and recovery. Under his leadership, six new pilot state programs will launch new membership and engagement models of assistance that will support a longer-term plan for membership growth, programs and services.



Posing for a group photo at the District #2 Caucus are members (l to r): Drs. Robert Bochiechio (President, EDDS), Raymond Miller (NYSDA Trustee), Elizabeth Kapral, James Hoddick (ADA Delegates), and Brendan Dowd (ADA District #2 Trustee)



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2025 EDDS ANNUAL CALENDER

January

1st - New Year's Day - Closed
 14th - Executive Council & Foundation Board
 Orientation – 6:30pm
 20th - MLK, Jr. Holiday - Closed
 21st - Erie County Board Meeting - 7pm
 25th - President's Reception (EDDS & Erie County)
 Roycroft Inn 6pm

February

3rd - CPR Training (ECDS) - Society Office - 5pm
 11th - Executive Council & Foundation Meeting - 7pm
 14th - ECDS Ski Day & CE & Business Meeting
 Holimont Ski Resort - 8am
 17th - President's Day Holiday - Closed

March

11th - Executive Council Meeting - 7pm
 19th – 20th NYSDA Lobbying Day - Albany
 25th - Erie County Board Meeting - 7pm
 27th – Fortress Risk Management Seminar - 5:30pm
 28th – Dr. Marshall Fagin Spring Lecture
 8am - 4pm Salvatore's

April

TBD - Mentoring Event - 6pm TBD
 9th - Executive Council Meeting - 7pm
 18th - Good Friday - Office Closed at 12pm
 25th – WNY Dental Career Pathway Conference
 9am – 1pm TBD
 TBD - Infection Control Seminar - 5:30pm
 TBD - New Dentist Event - Ivoclar

May

5th - CPR Training (ECDS) - Society Office - 5pm
 8th – UB Dental School Graduate Sign-Up Day - TBD
 13th - Executive Council & Foundation Meeting - 7pm
 TBD - HOD EDDS Caucus Pre-Meeting - 6pm TBD
 26th - Memorial Day Holiday - Office Closed
 27th - Erie County Board Meeting - 7pm
 29th – NYSDA HOD Uniondale, NY

June

9th - Wm. J. Knauf Memorial Golf Outing & CE -
 8am - 8pm Fox Valley County Club - Lancaster
 14th - Shred Day (Saturday) - 10am - 1pm Society
 Offices
 19th - Juneteenth Holiday - Office Closed

July

4th - Fourth of July Holiday - Office Closed
 TBD - New Dentist Social
 ADA Summer Conference - Chicago

August

4th - CPR Training (ECDS) - Society Office - 5pm
 14th – Erie County Budget Review – (TBD)
 19th - Foundation Retreat - 7pm

September

1st - Labor Day Holiday - Office Closed
 3rd - Defensive Driving Class – 5 - 9pm Society Office
 9th - Exec Council & Foundation Board Meeting - 7pm
 23rd - Erie County Board Meeting - 7pm

October

14th - Executive Council Meeting - 7pm
 13th – Columbus/Indigenous People's Day - Closed
 TBD - ADA House of Delegates Meeting – Washington, DC
 21st - Erie County Board Meeting - 7pm
 TBD - New Dentist & Member Event

November

3rd - CPR Training (ECDS) - Society Office - 5pm
 5-7th - Buffalo-Niagara Dental Meeting - Convention Ctr
 11th - Veterans Day Holiday - Office Closed
 18th - Executive Council Appreciation Dinner &
 Foundation Meeting 6pm - Saturn Club
 27th & 28th - Thanksgiving Holiday - Office Closed

December

5th - Dr. Richard Fink Memorial CE Seminar - 8am - 4pm
 6th - Holiday Party 10am – Location TBD
 25th & 26th - Christmas Holiday Break - Office Closed
 31st - New Year's Eve - Office Closed at 12 noon

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Dr. Aaron Mangum of Lake District Family Dentistry in Alexandria, LA

Risk Management Insights

Patient Notification and Records Management Considerations During a Practice Transition

Whether a provider is retiring, selling a practice, or simply moving on, it is recommended that providers seek professional advice from business attorneys and individuals familiar with federal and state laws to make informed decisions. While there are many considerations related to a practice transition, the purpose of this article is to provide general risk management guidance on patient notification and record management.

Patient Notification: Strategies to Reduce the Risk of Patient Abandonment Allegations

From a patient safety and risk management perspective, during a transition, it is recommended that priority be given to the patient communication process to prevent any delay or interruption in the patient's ongoing treatment. This can help to ensure continuity of care and prevent, or mitigate against, allegations of patient abandonment. It is recommended that patients at least be provided with information such as:

- the date in which the provider is leaving, retiring, or the office is closing,
- any specific referral information, and
- steps patients can take to request a copy of records or have them sent to another provider.

Sharing information with patients and providing adequate notice allows them the opportunity to find an alternative provider if needed. The American Dental Association recommends at least a 30-60 days notice to patients (ADA 2024). However, it is imperative that you familiarize yourself with any state specific rules and regulations that may stipulate alternative timeframes.

While not all situations are addressed, below are a few examples of how to manage patient notification and transition steps when a doctor is retiring, closing or leaving a practice.

1. If no designated provider is assuming responsibility for the patients, provide patients with resources to obtain a new provider and the steps required to obtain a copy of their chart when sending a notification letter.
2. If another provider is assuming responsibility for patients, notify the patient and coordinate the transition to the new provider to help prevent any interruption or delay in a patient's treatment.
3. The practice model and/or employment contract may impact the way in which patients are notified. Work with a personal or business attorney if clarification of the contract details is needed. If the practice takes the lead on notifying patients, confirm the process and your role as the initial treating provider in that process. Discuss any specific concerns with the practice owners. If there are patients in need of treatment or post-op care that you may not be able to address prior to leaving, work with the owners and colleagues to ensure continuity of care.

Notification Methods

Besides letters, patients and the community can be notified of the transition by:

- an announcement in the local paper,
- flyers in the office,
- staff notification when intaking or discharging a patient, or
- a phone message that patients would hear while on hold or when calling after hours.



Patient Record Management: Strategies for Safeguarding Records During a Transition

Regardless of the type of transition, providers have a responsibility to safeguard patient records and follow applicable federal and state record retention laws, which do vary. Additionally, it is important to consider any record retention provisions within contracted dental insurance plans. If needed, the state dental board, dental association, or a business attorney can assist with the interpretation of a state's record retention rules.

Documentation

It is the provider's responsibility to complete documentation of the care and treatment of each patient and sign chart notes. If applicable, consider how complete documentation of patient treatment details, and needed follow up, will provide the next provider with sufficient information to continue the treatment plan.

Transferring Records to Another Provider

If transferring records to another provider, patients may need to sign an authorization to release their records to the new provider (U.S. Department of Health and Human Services 2024). It is recommended that you speak with an attorney familiar with your state regulations to confirm how to appropriately transfer patient records.

Selling a Practice

If selling a practice, it is recommended that the sales agreement include details and language related to the transfer, retention and management of patient records. For example, if the original patient records are now managed by the new practice owner, an agreement may include how the current provider can obtain access to the records in the event of a claim or lawsuit in the future.

Summary

While the transition process requires several considerations, all of which cannot be addressed in this issue, it is recommended that providers give special attention to the patient communication and record management processes. State rules and regulations vary, and providers are encouraged to obtain legal guidance, follow applicable state laws and consider how best to transition the care of a patient without interruption.

Related Resources

American Dental Association Website 2024, Practice Management "Guide to Closing a Dental Practice." Assessed 14, May 2024, <https://engage.ada.org/p/dr/guide-to-closing-a-dental-practice-943>

American Dental Association Website 2024, "What to Do When Selling a Practice" Accessed 15, May 2024, <https://www.ada.org/en/resources/practice/practice-management/what-to-do-when-selling-a-practice>

U.S. Department of Health and Human Services Website 2024, FAQs for Professionals. Privacy Rule: General Topics. Accessed 19, April 2024, <https://www.hhs.gov/hipaa/for-professionals/faq/privacy-rule-general-topics/index.html>

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want to have a significant dues payment to add to their financial burdens.

The demographics of dentistry are changing significantly. When I graduated from dental school, there were five women in my class. The graduating classes these days have classes in which at least 50% are women. There are now more minority students graduating. All these potential members need to be welcomed into organized dentistry with open arms. We need to be more inclusive with our membership.

We must be proactive in our approach to membership. If you know someone who doesn't belong to the ADA, discuss membership and its advantages with them. Think of organized dentistry as our union. It advocates for all our members like a union would. Right now it has the political clout to advocate successfully. As our membership numbers decline, that advocacy is threatened. If our market share of eligible dentists falls below 50%, we will lose the political clout we now enjoy. The larger our market share is among eligible dentists, the louder our voice will be as we advocate for our profession, our patients, and the public. It is up to all of us to participate. We owe it to ourselves, our patients, and the future dentists.

Best wishes,
Kevin J. Hanley, DDS

1. What Makes Membership Matter, Maihofer, Michael G. DDS, The Journal of the Michigan Dental Association, Vol. 105: No. 2, Article 3
2. NYSDA Member Benefits Guide

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