

CONTINGENCY PLANNING & BRAINSTORMING WORKSHEET



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In Case of Emergency (ICE) or Emergency Contact Person (ECP)

1. Who is your In Case of Emergency Contact?

a. 1st Contact: _____

b. 2nd Contact: _____

2. Staff Notifications

a. Do you have an updated staff list with contact info including cell phone numbers? Yes No

b. Do you have a phone chain or POC to make these calls? Yes No

i. Who should initiate the phone chain? _____

c. Do you know what information your ECP is permitted to share with staff and patients?

3. Keys

a. Who has keys?

i. For the building: _____

ii. Locked drawers: _____

iii. Cash drawers: _____

IV. File cabinets: _____

V. Drug supply cabinets: _____

b. Are there additional keys staff will need in the event you are unable to be in facility for extended time? Yes No

c. Who should or should not have access to keys?

i. List people who should have access to keys

ii. List people who should never have access to keys

4. Access Points & Authorizations

a. Does your ECP know who your personal attorney is and if they should contact them?

i. Attorney Name & Phone Number _____

b. Have you consulted your personal attorney to make arrangements? Yes No

c. Do you have a POA in place in case something happens to you and decisions need made while you are unavailable? Yes No

d. Have you discussed ways to grant access to Accounting and Banking? Yes No

Opening the Doors

1. Staffing

a. Do you have enough staff to operate in your absence? Yes No

b. Do you have a relief pharmacist available? Yes No

c. Do you have contact info for a staffing agency available for your staff to use? Yes No

i. if Yes, which agency and what is their contact info?

2. Operations

a. Who has the authority to run the business in your absence?

i. Have they been trained what to do? _____

b. List people that can run the business in your absence and which duties and responsibilities they should carry out.

3. Additional Responsibilities

a. What functions do you perform that only you can do? _____

i. Who can you delegate some of these responsibilities to?

b. Do you have a plan for ordering, staffing, HR, Scheduling, etc. in your absence? Yes No

i. List your main functions and sub plans for each area

1. HR & scheduling _____

2. Accounts Receivable & Accounts Payable _____

3. Inventory _____

4. Pharmacy Management _____

5. _____

6. _____

7. _____

Documentation & Training

1. Training

- a. Have you ever discussed a contingency plan with staff? Yes No
- b. Do you hold regular trainings or can you schedule special training? Yes No
- c. List a date where you can review your contingency plan with your staff. _____

2. Documentation

- a. Do you have processes in written form that others can replicate? Yes No
- b. Do you have resource lists with contact numbers or email addresses? Yes No
- c. Do you have reminders established to revisit these items annually? Yes No

3. Business Partners

- a. Have you ever listed a second contact name on accounts such as software, ordering system, bank? Yes No
- b. Who is responsible for checking your mail and email in your absence? _____
- i. Do they know when to check, have a key for PO Box, and know how to access email account? Yes No

Contingency Plans

1. Short Term

- a. What are short term incidents that may cause you to be out of the building for a few days, what should your staff do in your absence?
- i. _____
- ii. _____
- iii. _____
- iv. _____

2. Long Term

a. What are long term incidents that may cause you to be out of the building for a few weeks or months, what should your staff do in your absence?

- i. _____
- ii. _____
- iii. _____
- iv. _____

3. Permanent

a. Succession Planning. What will happen to your business if you can't operate?

b. Will it be sold, gifted or transferred to a new owner?

i. Do you want to gift your shares to a spouse, relative, employee?

ii. Do you want to turn your ownership over to another partner/ co-owner?

iii. Do you want your estate to sell your business

c. Map out how you see your business operating in your absence, who owns it, who manages it, who is the beneficiary of your business proceeds?

d. Do you have provisions in place to help offset the tax liability these parties may assume if they are not your spouse?

Example: Your business is worth \$1,000,000- you leave it to your child. They will have to pay tax, let's assume 25%- so they will need at least \$250,000 to "inherit" your business. Bonus thought- have you discussed Key Man insurance with your insurance agent to help your heirs offset this tax liability?



If plan A doesn't work, remember the alphabet has 25 more letters.

-Claire Cook-



Documentation is a love letter that you write to your future self.

-Damian Conway-