Live Podcast - Your Practice Management Calendar
Feat. Dr. Suzanne Berman and Chip Hart

User Management and IT
• Lock out former users from:
  • EHR and PM systems
  • Quickbooks (or other accounting software), time clock software, etc.
  • On-line accounts (including email) and internal mailing lists
  • clearinghouse and payor WWW sites
  • lab and hospital portals
• Update the Administrator security
  • Office security system
  • Computer system
• Update your office inventory for insurance purposes.
  • You can use a video camera (like the one on your cell phone!) to document each room and closet.
• Perform a security audit (per MU guidelines)
• Update employee lists, phone numbers
• WWW site management (content, link check)

Cleaning and Supplies
• Clean out cabinets and drawers
• Purge old equipment
• Remove last year’s holiday cards
• Clean out sample closet
Policies and Procedures

• Review your policy and procedure manuals to make sure that your actual process reflects what's documented. Have everyone review it annually.

• Review the payor policy manuals. Most are available online or are searchable with friends like the Verden Group.

• Review all of your patient policies and handouts.

• Check the handouts you distribute at your office, including your practice brochure.

• Check all of your online materials.

• Use “version control” (i.e., put date or version numbers on each handout so you know if what you are holding is up to date).

• Make sure any list of your staff and clinicians is up to date (letter head, sign on your door, WWW site, emergency contact list).

• Update staff photos.

EHR and PM

• Make sure that you are taking advantage of every electronic transaction opportunity your clearinghouse/PM vendor offers. If you are not doing eligibility or electronic claims for every payer, check again.

• Perform all vendor-specific cleanup functions.

• Software updates.

• Perform optional updates.

• Review update training and materials to take advantage of new features.
**Practice Management**

- Update your pricing for every single procedure listed in your system
- Review your coding patterns.
  - How is your E&M distribution?
  - Did you bill any odd procedures last year?
- Check your vaccine product combinations
  - Are the combination vaccines you use the most cost and price efficient?
  - Are there any new coverage rules from your payors?
- Check for new procedure and diagnosis codes introduced this year
  - 2017 CPT: 96160 / 96161, 99420
- Make an periodic report of KPIs.
  - If your PM doesn’t make it easy to re-run reports for previous time frames, get your periodic sample.
  - Review your measures for comparative and discussion purposes.
- Check your third party vendor costs
  - Credit card
  - Cable/Phone/Internet
  - Waste disposal, stamp machine
  - WWW Site hosting
  - Pull all of your insurance contracts and confirm any “evergreen” dates
- Clean up Quickbooks/account categories
- Patient cleanup
  - Mark inactive families
- Practice Education
  - Research Seminar Opportunities
- Update your wall signs (and rotate them)