

Live Podcast - Your Practice Management Calendar

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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 on line 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 on-line 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)

