

# 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 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)

