

Your Practice Management Calendar

bit.ly/PediatricPracticeManagementCalendar

User Management and IT	Frequency
Lock out former users from: <ul style="list-style-type: none"> • 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 	Q
Check all former user email accounts and confirm forwarding	Q
Check all user permissions	Q
Confirm authentication on third party purchasing accounts (Staples, PSS, etc.)	Q
Update the Administrator security <ul style="list-style-type: none"> • Office security system • Computer system 	Q
Update your office inventory for insurance purposes <ul style="list-style-type: none"> • You can use a video camera (like the one on your cell phone!) to document each room and closet. 	Y
Perform a security audit (per MU guidelines)	Y
Update employee lists, phone numbers	Q
Perform all desktop/device system upgrades	M
Prepare for EOL replacement	Y
WWW site management <ul style="list-style-type: none"> • content, link check • cell phone • Plugin and security updates 	M
Update/change wifi passwords	Y
Update practice address book looking for closed/moved practices	Y

and physicians	
Test your UPSs and generator	Y
Test your vaccine fridge alert	Y
Confirm clinicians associated with each payor	Q
Cleaning and Supplies	
Clean out cabinets and drawers	Y
Purge old equipment	Y
Remove last year's holiday cards	Y
Clean out sample closet	Y
Waiting room analysis	Q
Policies and Procedures	
Review your policy and procedure manuals to make sure that your actual process reflects what's documented and every employee is educated.	Y
Review payor policy manuals	Y
Review all of your patient policies and handouts	Y
Check the handouts you distribute at your office, including your practice brochure	Y
Check all of your on-line materials (Pro tip: Use "version control")	M
Make sure any list of your staff and clinicians is up to date (letter head, sign on your door, WWW site, emergency contact list)	Y
Update staff photos	Y
EHR and PMS	
Review every electronic transaction opportunity your clearinghouse/PM vendor offers.	Q
Perform all vendor-specific cleanup functions	M
User controlled vendor software updates	M

Perform optional updates	Q
Review update training and materials to take advantage of new features	M
Update all DIRECT addresses, check for new ones	Q
Patient cleanup	Q
Mark inactive families	Q
Put all free vendor training opportunities and webinars on the calendar	Q
Consider/schedule time for vendor users conference	Y
Practice Management	
Prepare to update pricing using new RVU values and update them at the right time.	Y
Locate all contracts and fee schedules	Y
Reconcile your insurance panel	Q
Google yourself (practice and individual), check google alerts, read reviews	Q
Unclaimed property check	Y
OSHA Training	Y
Confirm HIPAA office, BAA agreements, HIPAA training	Y
Check all voicemail greetings	M
Review your lease agreement	Y
Review active shooter/fire/evacuation plans	Y
Confirm the location of all utility shut offs	Y
Check the crash cart	Y
Review your coding patterns <ul style="list-style-type: none"> • How is your E&M distribution? • Did you bill any odd procedures last year? 	Q

Vaccines <ul style="list-style-type: none"> • Make sure you are getting full GPO benefits • Are the combination vaccines you use the most cost and price efficient? • Inventory match your vaccines • Inventory match your admins to vaccines • Check for outdated CPT codes 	Y,Q,M
Check for new procedure and diagnosis codes introduced this year	Y
Make a periodic report of KPIs.	M
Run reports your PM/EHR can't produce retrospectively	M
Review your measures for comparative and discussion purposes.	Q
Check your third party vendor costs <ul style="list-style-type: none"> • Credit card • Cable/Phone/Internet • Waste disposal, stamp machine • WWW Site hosting 	Y
Check insurance, EHR, billing service, waste, etc., contracts for evergreen status	Y
Clean up Quickbooks/account categories	Y
Research Education/Seminar Opportunities	Y
Update your wall signs (and rotate them)	Y
Make plans to visit another practice	Q,Y
Review partnership agreements	Y
Review practice valuation	Y
Review employment/compensation agreements	Y
Annual coding updates and training	Y