January

Week 1	• Perform all desktop/device system upgrades (M) • Run reports your PM/EHR can't produce retrospectively (M) • Lock out former users (Q) • Check all former user email accounts and confirm forwarding (Q) • Check all user permissions (Q) • Update all prices (Y)
Week 2	• Check all voicemail greetings (M) • Optional vendor updates (Q) • Patient cleanup (Q) • MU Security Audit (Y)
Week 3	• WWW site management (M) • Google check (Q) • Performance measure review (Q) • Coding patterns (Q)
Week 4	• Perform all vendor-specific cleanup functions (M) • User controlled vendor software updates (M) • Review vendor update training and materials (M) • Check for vendor training (Q)

February

Week 1	• Perform all desktop/device system upgrades (M) • Run reports your PM/EHR can't produce retrospectively (M) • Confirm third party purchasing accounts (Q) • Update administrator security (Q)
Week 2	• Check all voicemail greetings (M) • Waiting room analysis (Q) • Update your wall signs (Y)
Week 3	• WWW site management (M) • Check material versions (Q) • Cleanup bookkeeping, chart of accounts (Y)
Week 4	• Perform all vendor-specific cleanup functions (M) • User controlled vendor software updates (M) • Review vendor update training and materials (M)

March

Week 1	• Perform all desktop/device system upgrades (M) • Run reports your PM/EHR can't produce retrospectively (M) • Update employee lists (Q) • Confirm clinician/payor associations (Q)
Week 2	• Check all voicemail greetings (M) • Check for new DIRECT addresses (Q) • Remove holiday cards (Y)
Week 3	• WWW site management (M) • Vaccine management (Q) • Clean out sample closet (Y)
Week 4	• Perform all vendor-specific cleanup functions (M) • User controlled vendor software updates (M) • Review vendor update training and materials (M) • Purge old equipment (Y)

April

Week 1	• Perform all desktop/device system upgrades (M) • Run reports your PM/EHR can't produce retrospectively (M) • Lock out former users (Q) • Check all former user email accounts and confirm forwarding (Q) • Check all user permissions (Q)
Week 2	• Check all voicemail greetings (M) • Optional vendor updates (Q) • Patient cleanup (Q) • Review practice valuation (Y) • Review partnership agreement (Y)
Week 3	• WWW site management (M) • Google check (Q) • Performance measure review (Q) • Coding patterns (Q)
Week 4	• Perform all vendor-specific cleanup functions (M) • User controlled vendor software updates (M) • Review vendor update training and materials (M) • Check for vendor training (Q)

May

Week 1	• Perform all desktop/device system upgrades (M) • Run reports your PM/EHR can't produce retrospectively (M) • Confirm third party purchasing accounts (Q) • Update administrator security (Q)
Week 2	• Check all voicemail greetings (M) • Waiting room analysis (Q) • Make plans to visit another office (Y) • Review policy and procedure manuals (Y)
Week 3	• WWW site management (M) • Check material versions (Q) • Check practice brochure (Y) • Review payor policy manuals (Y) • Locate all payor contracts and fee schedules (Y)
Week 4	• Perform all vendor-specific cleanup functions (M) • User controlled vendor software updates (M) • Review vendor update training and materials (M) • OSHA Training (Y) • HIPAA Training (Y) • Active shooter/fire/evacuation plan review (Y)

June

Week 1	• Perform all desktop/device system upgrades (M) • Run reports your PM/EHR can't produce retrospectively (M) • Update employee lists (Q) • Confirm clinician/payor associations (Q)
Week 2	• Check all voicemail greetings (M) • Check for new DIRECT addresses (Q) • Unclaimed property check (Y)
Week 3	• WWW site management (M) • Vaccine management (Q) • Review lease (Y) • Confirm utility shutoff locations (Y)
Week 4	• Perform all vendor-specific cleanup functions (M) • User controlled vendor software updates (M) • Review vendor update training and materials (M)

July

Week 1	• Perform all desktop/device system upgrades (M) • Run reports your PM/EHR can't produce retrospectively (M) • Lock out former users (Q) • Check all former user email accounts and confirm forwarding (Q) • Check all user permissions (Q)
Week 2	• Check all voicemail greetings (M) • Optional vendor updates (Q) • Patient cleanup (Q) • Update office inventory for insurance (Y)
Week 3	• WWW site management (M) • Google check (Q) • Performance measure review (Q) • Coding patterns (Q)
Week 4	• Perform all vendor-specific cleanup functions (M) • User controlled vendor software updates (M) • Review vendor update training and materials (M) • Check for vendor training (Q)

August

Week 1	• Perform all desktop/device system upgrades (M) • Run reports your PM/EHR can't produce retrospectively (M) • Confirm third party purchasing accounts (Q) • Update administrator security (Q)
Week 2	• Check all voicemail greetings (M) • Waiting room analysis (Q)
Week 3	• WWW site management (M) • Check material versions (Q)
Week 4	• Perform all vendor-specific cleanup functions (M) • User controlled vendor software updates (M) • Review vendor update training and materials (M)

September

Week 1	• Perform all desktop/device system upgrades (M) • Run reports your PM/EHR can't produce retrospectively (M) • Update employee lists (Q) • Confirm clinician/payor associations (Q)
Week 2	• Check all voicemail greetings (M) • Check for new DIRECT addresses (Q)
Week 3	• WWW site management (M) • Vaccine management (Q)
Week 4	• Perform all vendor-specific cleanup functions (M) • User controlled vendor software updates (M) • Review vendor update training and materials (M)

October

Week 1	• Perform all desktop/device system upgrades (M) • Run reports your PM/EHR can't produce retrospectively (M) • Lock out former users (Q) • Check all former user email accounts and confirm forwarding (Q) • Check all user permissions (Q)
Week 2	• Check all voicemail greetings (M) • Optional vendor updates (Q) • Patient cleanup (Q) • Coding Training for next year (Y)
Week 3	• WWW site management (M) • Google check (Q) • Performance measure review (Q) • Coding patterns (Q)
Week 4	• Perform all vendor-specific cleanup functions (M) • User controlled vendor software updates (M) • Review vendor update training and materials (M) • Check for vendor training (Q)

November

Week 1	• Perform all desktop/device system upgrades (M) • Run reports your PM/EHR can't produce retrospectively (M) • Confirm third party purchasing accounts (Q) • Update administrator security (Q) • Update practice address book (Y)
Week 2	• Check all voicemail greetings (M) • Prepare for EOL hardware replacement (Y) • Test your UPS, generator (Y) • Test your vaccine fridge alert (Y)
Week 3	• WWW site management (M) • Check material versions (Q) • Update wifi passwords (Y) • Review employment/compensation agreements (Y)
Week 4	• Perform all vendor-specific cleanup functions (M) • User controlled vendor software updates (M) • Review vendor update training and materials (M) • Review contracts for evergreen status (Y) • Review contract costs (Y)

December

Week 1	• Perform all desktop/device system upgrades (M) • Run reports your PM/EHR can't produce retrospectively (M) • Update employee lists (Q) • Confirm clinician/payor associations (Q)
Week 2	• Check all voicemail greetings (M) • Check for new DIRECT addresses (Q) • Check crash cart (Y)
Week 3	• WWW site management (M) • Vaccine management (Q) • Prepare to update pricing using new RVU values (Y)
Week 4	• Perform all vendor-specific cleanup functions (M) • User controlled vendor software updates (M) • Review vendor update training and materials (M)