

MEDICAL PRACTICE ASSESSMENT CHECKLIST



FRONT OFFICE

- ☐ Review / Implement EHR/EMR
- ☐ Review Patient Registration Process
- ☐ Review Patient Check-in Procedure
- ☐ Review Patient Contact Methods
- ☐ Review Training for Front Office Staff
- ☐ Review Missed Calls / Appointments
- ☐ Review Ease of Scheduling
- ☐ Review Employee Productivity
- ☐ Review Referral System & Management

MARKETING

- ☐ Review Marketing Team & Channels
- ☐ Review Marketing Budget
- ☐ Review Customer Feedback
- ☐ Review Website Usability
- ☐ Review Website SEO
- ☐ Review Google My Business Listing
- ☐ Review Competitors in 30-Mile Radius
- ☐ Analyze Competitor's Services and Pricing
- ☐ Conduct SWOT Analysis on Your Practice and Your Competitors
- ☐ Analyze Your Competitor's Marketing Efforts. Analyze how You Differ

FINANCIALS & BILLING

- ☐ Review Accounts Receivable
- ☐ Review Denial Rate
- ☐ Review Payer Contracts
- ☐ Review Medical Billing Software
- ☐ Review Pre-Authorization Process
- ☐ Review Payer Contracts
- ☐ Review Business Plan & Goals
- ☐ Review Revenue Cycle
- ☐ Audit Finances for Fraud

COMPLIANCE

- ☐ Review in-person and digital security
- ☐ Review / Implement business associate agreement
- ☐ Review Password Protection Measures
- ☐ Review Cyber Insurance Policy
- ☐ Educate Staff on Compliance Changes
- ☐ Conduct Compliance Audits
- ☐ Review Documentation Procedures