

End of 2023/Beginning of 2024 Checklist

It's that time of year again. Time to verify various things in our practices so we have everything in order as much as possible so we have fewer surprises in the coming year.

Things to check while it's still 2023:

- Renew malpractice and cyber insurance
- Renew membership in professional organizations (NYSSCSW, AAPCSW, etc.)
- Remind patients about outstanding balances
- Check office lease & terms
- Review insurance network status
 - Are you still in net after the mergers?
- Review equipment status & condition
 - Is it time to update/replace?
- License/registration renewal date
 - CE status
 - how many needed vs how many accumulated
- Review/Write/Update personal and professional advanced directives.

Things to check when it becomes 2024:

- Patient insurance status
 - Check this yourself
 - Patients don't often know
 - Patients don't know how to check
 - Patients don't ask the correct questions
 - Patients don't relate the information correctly
 - Review patient insurance status with patients
- Did you remember your malpractice insurance?
- Did you renew with NYSSCSW?
- Close out your books (accounting) for year 2023
- Start preparing your tax filing
- Review/Review with patients/Renew:
 - Informed consent for treatment
 - Consent for treatment via telehealth (if required)
 - Good Faith Estimate (as required)
 - Consent for Release of Information
 - Cancellation policy
 - Telehealth policy
 - Relevant licensing regulations
 - Relevant telehealth regulations
 - Old/closed charts that can be properly discarded (shred)
 - Check monthly
 - Other "housekeeping" matters

There may be more that should be attended to, but this is all I can think of at the moment.