End of year Operational Checklist for Chiropractic Offices

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What's

INSIDE

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Financial Review & **Planning**

Annual Budgeting Review

📌 Review Year-to-Date P&L Statement

☐ Assess profits and losses to evaluate financial health.

📌 Annual Overhead/Operating Fee Review

Review and adjust

☐ Utilities
☐ Insurance (health, life, malpractice, liability)
☐ Software (billing, EMR, scheduling, etc.)
☐ Subscriptions
☐ Payroll
☐ Credit card processing fees
☐ Vendor contracts and fees
☐ Rent/Lease agreements

📌 Monthly Financial Scorecard

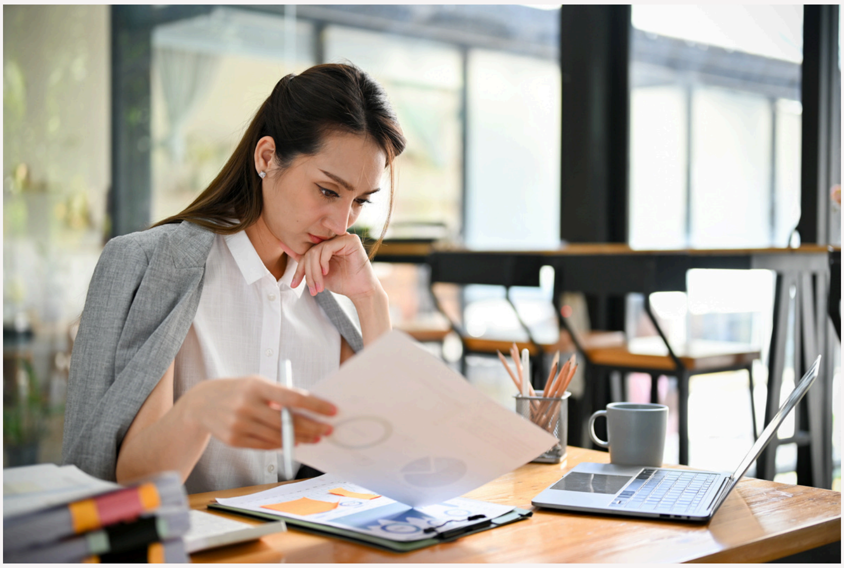
☐ Evaluate monthly financial metrics for trends and growth.

📌 Create Next Year's Budget

☐ Plan expected revenues, expenses, and profit margins.

📌 90-Day Cash Flow Forecast for Crisis Management

☐ Prepare a short-term financial plan for unexpected disruptions.



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Marketing Strategy for

12 Months

Internal Marketing

📌 Social Media Strategy

☐ Update social media calendar and content plans.

📌 Workshops

☐ Plan and schedule patient education workshops.

📌 Appreciation Days

☐ Organize patient or referral partner appreciation events.

📌Whiteboard

External Marketing

📌 Referral Partners

☐ Strengthen relationships and build partnerships with local businesses and health professionals.

📌 Events

☐ Plan participation in health fairs, community events, and educational screenings.

📌 Lunch & Learns

☐ Schedule educational sessions with local groups or businesses.

Retention Review & Strategy

📌 Retention Analysis

☐ Review patient retention reports.

☐ Develop strategies to improve patient retention.

Website Review

📌Website Satisfaction - Analytics

☐ Update the practice's website for accuracy and engagement.

☐ Refresh content and enhance the user experience.

📌SEO optimization

📌Check reviews

Social Media Focus

📌 Content Review

☐ Review social media performance and engagement.

☐ Adjust strategies for the upcoming year

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Optimizing Collections &

Billing Department

📌 Chase Accounts Receivables (A/R)

☐ Focus on clearing outstanding balances and a Q4 push for collections - outstanding A/R report

📌 Collections Department Review

☐ Ensure billing processes are optimized for efficiency.

📌 Credentialing/Recredentialing

☐ Review provider credentialing status and renew as necessary.

📌Compliance Protocols reviewed

☐ Forms, Policies etc

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Practice Operating System

Review

📌 The Complete Care Way (SOPs Review)

☐ Update Standard Operating Procedures for efficiency.

📌 Office Policy Manual

☐ Ensure the policy manual reflects any changes in operations or laws.

📌 The Complete Care Experience (Patient Care Training)

☐ Plan patient satisfaction training for staff.

📌 Update Forms for the New Calendar Year

☐ Refresh patient intake and operational forms.

📌 Update Daily Checklists & Logs

☐ Review and refine daily operations logs and checklists.

📌 Scheduling Guidelines Update

☐ Revise communication guidelines and scheduling protocols (e.g., no-show policies, time slots for new patients).

📌 Phone Etiquette & Scripting

☐ Refine and update phone scripts for patient communication.

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SWOT

Analysis

📌 End-of-Year SWOT Analysis

- ☐ Review practice strengths
- ☐ Review weaknesses
- ☐ Review opportunities
- ☐ Review threats

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Retention Review and

File Audit

📌 File Review for All Providers

☐ Conduct a file audit for patient compliance and completeness.

📌 Retention Report

☐ Assess patient retention and provider effectiveness.

📌 Develop Strategies to Improve Retention

☐ Implement actionable steps based on retention data.

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Inventory and

Equipment

📌 Update Inventory Checklist

- [ ] Ensure all clinical supplies and office materials are accounted for & update checklist

📌 Equipment Checklist- warranties & servicing

- [ ] Ensure all clinical equipment is serviced accordingly

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Meeting and

Training

📌 Schedule End-of-Year Training

- ☐ Plan a mandatory training session to review changes in roles, policies, procedures, and forms.

📌 Schedule Monthly & Quarterly Meetings

- ☐ Set dates for ongoing team meetings and performance reviews.

Human Resources and

Team Management

📌 Update Core Values

☐ Reassess the practice's core values if needed.

📌 Onboarding New Hire Checklist

☐ Ensure the onboarding process is streamlined for new hires.

📌 Performance Audits

☐ Conduct employee performance audits to assess readiness for raises and bonuses.

📌 Contract review

📌 Employee Termination System

☐ Review protocols for employee departures or terminations.

📌 Policy Manual/Training Handbook Updates

☐ Update employee handbook and training manuals (e.g., PTO policy).

📌 Annual HIPAA Training

☐ Ensure all employees complete mandatory HIPAA training.

📌 Gross Success Factors (GSFs)

☐ Review employee roles, job expectations, and performance metrics.

📌 PTO Submission Protocol

☐ Clarify the protocol for PTO requests and management.

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Disaster and Emergency

Preparedness Plan

📌 Review & Update

- [ ] Ensure the practice has a solid plan in place for emergencies or disasters.

This provides a comprehensive approach for the chiropractic practice to close the year on a strong note and position yourself for growth in the coming year.

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