



GLMS End of Year Checklist for Medical Practices

Along with preparing your accounts for month/year end, there are a few other items that should not be overlooked for End of Year. Following is a list of important reminders to consider before we welcome the new year;

- ☐ Have you had employee turnover this year? Ensure your Employee/User log ins and profiles are up to date (end permission rights to ex-employees; apply for new ones for new employees)
- ☐ Compliance – are your policy manuals up-to-date?
 - Review policies in the employee handbook and ensure it is up-to-date with employment laws, compensation, benefits
 - Revise HIPAA and other compliance plans to reflect recent legislative changes or changes in operations
 - If your practice accepts payment from Medicare Advantage plans or Medicaid then you must meet the Centers for Medicare & Medicaid Services (CMS) compliance program requirements for first tier, downstream and related (FDR) entities. You also must confirm your compliance with these requirements through an annual attestation.
- ☐ Training – has your staff received required training/education?
 - If your practice accepts payment from Medicare or any Medicare Advantage plan then every staff member must satisfy general compliance and Fraud, Waste and Abuse training requirements.
 - Every staff member should also be trained in HIPAA and OSHA and the practice needs to keep a training log showing that this has been completed
- ☐ Contracts
 - Review vendor contracts – is the relationship working? Need to renegotiate?
 - Review insurance contracts.
 - Request a current fee schedule if you cannot locate yours.
 - Have there been material changes to your contract with a payer? If so, these changes should have been sent to the practice in an orange-colored envelope with the phrase “ATTENTION! CONTRACT AMENDMENT ENCLOSED!”