



New Year Success Checklist			
Due Date	Annual Task	Responsible Person	Complete Date
	<b>WIP Assessment &amp; Cleanup</b>		
	Review items not delivered		
	Identify process improvements		
	Cleanup WIP		
	<b>Review &amp; Update Company P&amp;P Manual</b>		
	Review State & Federal employment law changes		
	Review State & Federal required postings		
	PHI storage and security permissions		
	HIPAA & OSHA regulations for compliance		
	<b>Company Annual Training</b>		
	HIPAA Refresher Training		
	Policy & Procedure Manual Review		
	Coding & Reimbursement Policy Updates		
	Company Process Changes		
	<b>Review &amp; Update Accreditation Manual</b>		
	Update policies to reflect any changes		
	<b>Schedule Annual Accreditation Requirements</b>		
	AD Requirements		
	HR Requirements		
	PC Requirements		
	PM Requirements		
	FS Requirements		
	CB Requirements		
	<b>Contract Maintenance</b>		
	Billed Medicare for each PTAN in calendar year		
	Revalidations/Recertifications		
	Review contracts		
	Identify contracts for renegotiation		
	Confirm fee schedules in software are correct		
	<b>Strategic Planning</b>		
	Set annual goals (four pillars)		
	Set goal check in dates		
	<b>Other</b>		

This sample checklist is for educational purposes only. It is not a comprehensive list of all tasks and requirements for business operations.