GREENWELL PSYCHOLOGY

# Annual Practice Review Checklist

## 1. Self & Practice Sustainability

☐ Reflect on recent personal wellbeing and family/loved one's needs.

☐ Assess current workload, current boundaries, and self-care routines.

☐ Reflect on and adjust protected admin time slots.

☐ Identify friction points and workflow inefficiencies.

☐ Plan your routines for restorative/meaningful activities.

☐ Review and reflect on current ancillary academic or voluntary roles and commitments.

☐ Book out vacation and set time-off plan.

☐ Check-in on supervision, personal therapy, and consultation support needs.

## 2. Financial & Administrative

☐ Run year-end Balance Sheet, P&L, and Cash Flow reports.

☐ Set Plan for Uncollected Balances this last year.

☐ Analyze financial sustainability of the practice (e.g., target billable hours).

☐ Meet with bookkeeper/tax preparer. Prepare to file taxes.

☐ Consider whether to hold an annual LLC meeting (a forum to discuss strategy, ownership, and issues facing the company).

☐ Update fee schedule/reimbursement rates, and Good Faith Estimates (GFEs).

☐ Review retirement, school loans, and savings goals.

☐ Audit subscription services and budget allocations.

☐ Review emergency fund, professional disability insurance, and continuity plan.

## 3. Legal, Ethical, & Compliance

☐ Confirm all professional licenses, liability insurances, and business registrations are/will be renewed.

*This draft checklist is not exhaustive as our requirements and goal evolve.

☐ Reflect on telehealth practices, plans/policies for interjurisdictional work. What locations will I be working from or into next year?

☐ Conduct Annual HIPAA risk assessment. Review HIPAA and BAAs with vendors, contractors and staff. Implement training as needed.

☐ Audit record retention and destruction compliance.

☐ Update SOPs and internal policies (what policies worked and what are ignored, what new ones are needed)?

☐ Ensure informed consent and privacy forms are current (e.g., update NPP).

☐ Review emergency and release of information procedures.

☐ Check for updated ethical guidelines and professional standards (Licensing board website, CE trainings, National Org's site).

## 4. Clinical Quality & Client Experience

☐ Review caseload, current offerings (e.g., group, talks) and fit with practice goals.

☐ Review Waitlist management & new client procedures (e.g., intake forms, free consults)

☐ Collect and analyze client feedback/outcome measures.

☐ Ensure charting, treatment plan, and documentation completeness.

☐ Review equity, inclusion, and accessibility practices for clients and staff (e.g. website, physical environment).

☐ Evaluate referral sources, staff, and partnerships.

☐ Review MH crisis plan and update client resources for an emergency.

☐ Reflect on ethical issues encountered this year.

☐ Review Professional Will and make any needed updates (e.g., password, contact info).

☐ Check for inactive clients, send ending of care notifications, and archive files of clients.

☐ Consider general updates for all current clients (e.g., fee change, new programming)

## 5. Marketing, Technology & Security

☐ Conduct data security and breach review for the year.

☐ Verify any needed backups and encryption measures (e.g. laptop settings).

*This draft checklist is not exhaustive as our requirements and goal evolve.

☐ Update software, passwords and password management systems.
☐ Refresh website content, google business listing, in-network insurances, and therapist directories (e.g., Psychology Today, NPI, CAQH Profiles).
☐ Evaluate and/or new outreach to primary referral sources, social media and community education/ outreach strategies.
☐ Confirm cloud storage and backup integrity (e.g., review file sharing, confirm unneeded PHI is deleted)

## 6. Professional Growth & Development

☐ Track CE totals & certification expiration dates.
☐ Define future training goals (e.g., new modality or certification), professional conferences, or other learning needs.
☐ Review mission statement and long-term vision.
☐ Set plan for pro-bono or community engagement.
☐ Assess peer consultation and interdisciplinary collaboration.

## 7. Office & Logistics

☐ Renew lease and insurance policies (liability, disability, health).
☐ Review office supplies and equipment needs.
☐ Deep clean and refresh workspace.
☐ Check in with staff and contractors.
☐ Update IC/staff/your emergency contacts and crisis protocols.

## 8. Year-End Wrap-Up

☐ Summarize key lessons from the year.
☐ Celebrate achievements and milestones.
☐ Identify 3–5 focus areas for improvement next year.

☐ Other priorities*_____________________________________________

*This draft checklist is not exhaustive as our requirements and goal evolve.