



athenaPractice™ 2022: Year End Checklist & Prep for 2023

Are you ready for 2023? We know there's a lot to consider when closing out 2022 and entering 2023. That's why we created a checklist of all the tasks you should consider as you prepare for the upcoming year.

[Download a printable version of the checklist here](#)

Events & Info

Visit our [webinars page](#) to view past and upcoming webinars

- Revisit this page throughout the year for additional webinars offered

Upgrades & Product Roadmap

Collaborate with your CSM to plan your next upgrade:

- V22 is available, plan your upgrade now.
 - [Check your quality requirements for upgrading to v22](#)
- Stay up to date with roadmaps, [Medication Management Top Ten](#), etc.
- Upgrade Assurance: Consider this annual subscription for Upgrades, Point Releases, Patches/Hot Fixes, etc to help you stay on the latest and greatest version
 - Ask your CSM or Sales Executive about Upgrade Assurance
- v23 is planned for released mid-year, includes PM Uplift

End of Support:

athenaPractice/athenaFlow™ v19 End of Support on June 1, 2023, announced in the [November 17 Customer Briefing](#).

- Contact your CSM or Sales Executive to plan your upgrade to a current version in early 2023.

End of Life for Surescripts Products – Dec 31, 2023:

Review replacement products offered by athenahealth

- Secure Messenger and Patient Portal to be replaced by MOT, ezAccess products:
 - Patient Portal, ezAccess; and Secure Messenger, ezDirect
- Document Management to be replaced by InDxLogic
- Watch the webinar recordings for these product introductions:
 - [Dec 7, 2pm ET for InDxLogic](#)
 - [Dec 14, 2pm ET for MOT/ezAccess products](#)

Contact your CSM or Sales Executive for information on migrating to these products

Fee and Allowable Fee Schedules

Review and update fee schedules & allowables for 1/1/2023 in athenaPractice™
> **Allowable Schedule Tip:** Contact payers (at least your top 5 payers) and request your 2023 allowable schedule.

Review documentation for E&M Coding changes in 2023 and make plans for 2023 accordingly

Schedule Review & Management

Review and update schedule templates to reflect working hours of your providers in 2023

Consider schedule alterations based on the changing healthcare landscape (i.e., telehealth visits, sick/well visits, in office testing, hospital procedures)

Fully Work Receivables, Collections, and Overpaid Claims

Identify and resolve any outstanding Accounts Receivable issues to start 2023 with up-to-date Accounts Receivable

Review overpaid claims and issue credits as appropriate

Utilize Task Management to identify receivables needing work & potential overpaid claims

Review and verify collection agency information

- Identify an office policy/procedure for working delinquent patient accounts, especially if you are not working with a collection agency
- Review bad debt, collections policies, and update if needed

Self-Pay

- Consider adjusting self-pay balances of a certain age to bad debt or send the balances to your Collection Agency (per your office policy)
- Consider new office policies for no shows, cancelations etc., and communication via statements or other methods

Deductibles

- Remind staff of high January deductibles
- Be sure you are collecting as much money as possible at Time of Service

Patient (Paper) Forms/Questionnaires

- Review hard-copy forms and ensure the year is updated to 2023, as necessary

Quality Management

- Satisfy all Quality submission tasks for 2022
- Consider enrollment for QSS (Quality Submission Service) – Let us submit for you!

Plan your Hard Close Date

- Ensure you have a plan to hard close your month/year

Closing the Day (Hard Close) is the process that locks financial transactions so that they cannot be changed without creating an audit trail. Through security, you can determine which users will have the ability to modify (void and clone) or delete (void) transactions from previous months. This ensures the financial integrity of your system and the accuracy of your reports. Leaving the system open allows transactions to be deleted without an audit trail - and is likely to drive your accountant crazy. Your practice determines the timing of Hard Close, but at least once per month is best practice. Keep your Hard Closings current to protect your financials!

Sign up for Groups on the Success Community

- Ensure you are signed up for Groups to receive important communication.
- Recommended Groups are:

aPractice/aFlow Customer Communications – we suggest setting your notification preferences to [Daily or Weekly digest](#)

JOIN this group to stay informed on product and industry alerts, upcoming Webinars, business leader communique's and more from athenahealth for your athenaPractice, athenaFlow and related solutions.

aPractice/aFlow eRx Network Status – we suggest setting your notification preference to [Every Post or Daily digest](#)

When you join this group, you will get updates on changes impacting electronic prescribing including alerts for scheduled or unscheduled outages.

athenaPractice Product Downloads /athenaFlow Product Downloads – we suggest setting your notification preferences to [Weekly digest](#)

Join the appropriate group to stay informed of new releases of your athenaPractice/ athenaFlow software, from new versions to service packs, patches, and monthly clinical knowledgebases. Keeping all your software up to date is critical to protect your data from ransomware, malware, and other malicious attacks.

athenaPractice Revenue Cycle – we suggest setting your notification preferences to [Weekly or Limited digest](#)

Join this group to stay informed on athenaPractice and Revenue Cycle related product alerts, upcoming athenaPractice only Webinars, and more from athenahealth for your athenaPractice related solutions.

aPractice/aFlow IdeaZone – we suggest submitting your great ideas!

Join this group to submit enhancement requests for our athenaPractice & athenaFlow solutions. Suggestions made here will be considered for possible inclusion in future product releases. Please make sure to follow the community guidelines on submissions.

Want to know more?

To find more info, go to Help (F1) within athenaPractice and enter your subject in the Index tab. You can also visit our [Success Community Learning Site](#) and review the related CBTs, review supporting documents on our [athenaPractice Group](#), or ask your Customer Success Manager for more information on training and

documentation available.

What keeps you up at night?

What other topics would you like to see covered in these monthly Tips and Tricks newsletters? [Click here](#) to tell us.

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