

The 60-Minute Quarterly System Review

Systems do not fail all at once; they drift. A metric creeps up, an SOP goes stale, a renewal sneaks past. This four-block review catches the drift before it becomes a problem. Schedule it four times a year and keep it to the hour.

Before you start

Put this on the calendar as a standing appointment, four times a year, that cannot be bumped, one review is a snapshot, four a year is a steering system. Decide who runs it (usually the practice manager) and who is in the room (often the manager and an owner-physician), so decisions get made.

Quarter: _____ Date: _____ Run by: _____

Block 1 · The numbers (20 min)

Review your key metrics against benchmark. Note what moved since last quarter and what sits furthest from benchmark. Diagnose only, do not fix yet.

Metric	Benchmark	This quarter	Last quarter
Denial rate	Under 5%		
Days in AR	Under 35-40		
Clean claim rate	95%+		
Net collection rate	95%+		
No-show rate	Under 5-7%		
Prior auth hours / physician / wk	Lower is better		

Block 2 · The systems (15 min)

	Do our core SOPs still describe how we actually work? An SOP that no longer matches the workflow is worse than none, flag any to update
	Does every key task still have a clear, current owner? A departure or role change can quietly orphan a task
	Are there workflows the team works around because the documented version is stale?
	Any new process this quarter that still needs an SOP or an owner?

Block 3 · The deadlines (10 min)

Look ahead across the next quarter or two for the dates that bite if missed. For anything approaching, confirm it has an owner and a start date.

☐	Credentialing revalidations / recredentialing due soon
☐	Payer re-attestations (CAQH ~every 120 days)
☐	Hospital privileges reappointments
☐	License and DEA expirations
☐	Malpractice and other insurance renewals

Block 4 · The next fix (15 min)

Choose ONE fix to prioritize next quarter, drawn from what the first three blocks surfaced. One fix carried to done beats five started. Assign it an owner and a rough plan.

Next quarter's one fix: _____

Owner: _____ Target date: _____

The whole review

20 minutes on the numbers, 15 on the systems, 10 on the deadlines, 15 on the next fix. Run consistently, it keeps your systems from drifting and produces one focused improvement every quarter, which compounds over a year.