

END OF QUARTER AUDIT FOR QUARTER:

The end of a quarter lends itself to “cleaning up” and “closing out” a time in a business.

It’s also a good idea to use that time to think about what has worked, and what hasn’t, to regroup, and to refocus.

We recommend doing the following:

- 1.** Run an overdue recare report for the months in this quarter. Check notes on the patients who have been contacted and not scheduled and decide if/how they should be contacted again.
- 2.** Run an overdue treatment report for the months in this quarter. Check notes on patients who have been contacted and have not scheduled and decide if/how they should be contacted again.
- 3.** Decide what has worked well this quarter for the practice in terms of marketing, team training, etc and make notes of those.
- 4.** Decide what has NOT worked well this quarter for the practice in terms of marketing, team training, etc and make notes of those.
- 5.** Map out the next quarter(s) in this planner. Be sure to include team member birthdays, meeting dates, continuing education, office repairs, marketing ideas etc.

END OF QUARTER AUDIT FOR QUARTER:

Quarterly Task	Notes	Initial and Date When Completed
Quarterly Overdue Recare Report		
Quarterly Overdue Treatment Report		
What worked well this quarter?		
What did NOT work well this quarter?		
Map out future quarter(s).		
Notes		