QUARTERLY PRACTICE AUDIT

The Testing Psychologist | Business Lab Sprint

Pull 5–10 reports from the past quarter before you begin. Complete this audit every 90 days.

01	**02**	**03**	**04**
Clinical Quality	Financial Health	Tech & Security	Operational Flow

PILLAR 1 · Clinical Quality Audit

Pull 5–10 reports from the last quarter and review them against your established standards.

Battery Architecture

- ☐ High-demand executive functioning tasks are front-loaded in the testing day
  - *↳ Reference Expected Value of Control theory — cognitively heavy tasks before lunch*
- ☐ Afternoon subtests reviewed for a fatigue dip in scores
- ☐ Battery order rotated if fatigue pattern is detected
  - *↳ Update your battery planner (spreadsheet or Word doc) to reflect any changes*

Validity Chain

- ☐ Adherence to AACN/NAN consensus two-failure rule confirmed
- ☐ Marginal PVT failures reviewed across the sample
- ☐ No validity red flags were ignored because the client 'seemed motivated'
  - *↳ One PVT failure = noteworthy. Two independent failures = sub-optimal effort*
- ☐ If red flags were glossed over: add a validity measure or tighten the protocol

Narrative Synthesis

- ☐ Reports describe bottlenecks between domains — not just a score dump
- ☐ Data is integrated and synthesized, not listed
- ☐ A referral source reading the report would have a clear life roadmap from page one
- ☐ One-page summary present, with the most important information up front
  - *↳ Apply the 'so what' rule: what does this mean for this person's life?*

PILLAR 2 · Financial Health Audit

You cannot manage what you don't measure. Pull your numbers before completing this section.

Time Audit

- ☐ Time logs are being kept (if not: this is your first fail — start now)
- ☐ Admin-to-clinical time ratio calculated
  - *↳ Target: 1 hr admin per 6 hrs clinical → aim for 1:8 or 1:10 with better systems*

☐ Identified at least one administrative task that could be offloaded or automated

Real Hourly Rate

☐ Total revenue from last quarter pulled (from QuickBooks or accounting software)

☐ Overhead and taxes subtracted from gross revenue

☐ Divided by actual hours worked — clinical AND administrative

☐ Real hourly rate compared against your target rate from the sprint

↳ *If you never set a target rate, do it now — it's not too late*

Profit Margin & Costs

☐ Gross profit margin calculated for the quarter

↳ *Solo practice target: 50–65% of gross revenue*

↳ *Small group target: 35–50% | Large practice target: 15–25%*

☐ Labor-to-revenue ratio reviewed (most critical metric as you scale)

☐ Psychometrist model reviewed if applicable — is the math still working?

☐ Battery costs reviewed for potential cuts

☐ Rates reviewed — is a rate increase warranted?

PILLAR 3 · Tech Stack & Security Audit

Digital vault health check. If you're unsure on any of these, that's your answer.

BAA Audit

☐ Reviewed every piece of software used this quarter

☐ Signed Business Associate Agreement (BAA) confirmed for EHR

☐ Signed BAA confirmed for scoring platforms

☐ Signed BAA confirmed for report writing tools

☐ Signed BAA confirmed for AI tools

☐ Signed BAA confirmed for email platform

↳ *No BAA = significant liability. Don't skip this one.*

Data Sovereignty

☐ Not using public-facing AI tools for drafting (ChatGPT, standard Claude, non-Workspace Gemini, Copilot)

☐ Moved to a private instance model for any AI use

↳ *HIPAA-compliant options: Gemini within Google Workspace, Bastion, or Reverb*

Data Leak Test

☐ Reports are delivered through a secure encrypted patient portal

☐ If using email: PDFs are password protected at minimum

↳ *2026 standard of care is moving toward portal-only delivery*

☐ Plan in place to transition to portal-only if not already there

PILLAR 4 · Operational Flow Audit

Friction test: how many days from first call to final report delivery?

Referral-to-Feedback Timeline

☐ Referral-to-feedback timeline calculated for last quarter

↳ *Target: well under 60 days. Trending toward 90? Friction is high.*

☐ If private pay: clients are paying for speed — timeline is a direct revenue risk

☐ Identified the single biggest bottleneck in the current workflow

Workflow Efficiency

☐ Manual scoring reviewed — can any of this be automated or streamlined?

☐ Client onboarding process reviewed for unnecessary friction

☐ Administrative drag points identified and documented

☐ AI language model used as a workflow consultant (if you haven't tried this yet, do it)

↳ *Prompt: 'Act as a workflow efficiency consultant. Ask me questions about my client onboarding and assessment process to find gaps and inefficiencies.'*

AUDIT SUMMARY

Pillar	Key action / follow-up
01 · Clinical Quality	
02 · Financial Health	
03 · Tech & Security	
04 · Operational Flow	

Next audit date: _____   Completed by: _____   Quarter: _____