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| Billing Checklist | | |
| **Task** | **Frequency** | Completion Date and Status |
| Process client co-pays | Daily |  |
| Verify Client benefits | Daily |  |
| Check Trello for billing notifications | Daily |  |
| Submit EDI Claims | Daily |  |
| List any claims with missing information | Daily |  |
| List any claims with missing notes, etc (Clinician fix) | Daily |  |
| Post ERA’s | Daily |  |
| Update Changes in Client amount owed in the patient billing tab | As needed |  |
| Follow up on Denied Claims, Appeals, etc | 2x a week |  |
| Resubmit Claims (if can correct internally) | 2x a week |  |
| Resolve & Resubmit Claims (insurance involvement) | 2x a week |  |
| Run Aging Reports (insurance) | 2x a week |  |
| Run Aging Reports (client) | Weekly |  |
| Collection on Client Balances | Weekly |  |
| Follow up on Client Payment Plans | Weekly |  |
| Create Client Statements (month) | Monthly |  |
| Generate Client Superbills | Monthly |  |
| Create YTD client statement | End of the year or upon client termination |  |

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| Billing KPI’s | | | | | | | | | | | | | |
| Task | Goal | Jan | Feb | March | April | May | June | July | August | Sept | Oct | Nov | Dec |
| Clean Claims | 98% |  |  |  |  |  |  |  |  |  |  |  |  |
| EOBs  Reviewed | 100% |  |  |  |  |  |  |  |  |  |  |  |  |
| Days from  TOS to  Billing | < 3 Days |  |  |  |  |  |  |  |  |  |  |  |  |
| Average  A/R | <30 Days |  |  |  |  |  |  |  |  |  |  |  |  |
| Avg Days in  A/R over  120 Days | < 12-1 5% |  |  |  |  |  |  |  |  |  |  |  |  |
| Eligibility  and Benefit  Verification | Same Day |  |  |  |  |  |  |  |  |  |  |  |  |
| Claims Paid  < 45 Days | 85% |  |  |  |  |  |  |  |  |  |  |  |  |
| Unpaid  Claims | <4% |  |  |  |  |  |  |  |  |  |  |  |  |
| Unpaid  Client  Balances | 3-5% |  |  |  |  |  |  |  |  |  |  |  |  |
| Denial rate | < 3-5% |  |  |  |  |  |  |  |  |  |  |  |  |
| TOS to  collection | 90% |  |  |  |  |  |  |  |  |  |  |  |  |