

Billing Company Evaluation Checklist

Use this checklist when evaluating a medical billing or revenue cycle management vendor.

Vendor _____	Reviewer _____
Evaluation Date _____	Decision _____

Scope & Expertise

- ☐ Services included / excluded are clearly defined.
- ☐ Experience with relevant specialties and payer mix is demonstrated.
- ☐ Credentialing, authorizations, coding or patient billing capabilities are clarified.
- ☐ Escalation and account-management model is defined.

Operations & Reporting

- ☐ Claim submission cadence and rejection workflow are documented.
- ☐ Denial management process and turnaround expectations are clear.
- ☐ A/R follow-up methodology is defined.
- ☐ Reporting includes meaningful operational and financial KPIs.
- ☐ Client has appropriate visibility into work queues / results.

Technology & Security

- ☐ EHR / PM workflow compatibility is confirmed.
- ☐ Secure access, user provisioning and termination controls are defined.
- ☐ HIPAA-related responsibilities and BAA requirements are addressed.
- ☐ Data backup, continuity and incident procedures are discussed.

Commercial Terms

- ☐ Pricing model and exclusions are clear.
- ☐ Implementation / transition responsibilities are documented.
- ☐ Contract term, termination and data-return provisions are reviewed.
- ☐ Performance claims are supported by defined methodology rather than vague guarantees.

Administrative resource only. Requirements vary by payer, program, state, specialty and organization. Verify current requirements with the applicable official source before submission. This resource is not legal, tax or clinical advice.