

Medical Billing Transition Checklist

Plan the handoff of billing operations, data, payer access and outstanding receivables when changing billing arrangements.

Practice 	Outgoing Vendor
Incoming Vendor 	Go-Live Date

Transition Planning

- ☐ Define transition date and responsibility matrix.
- ☐ Identify current systems, vendors and access owners.
- ☐ Inventory open A/R, held claims, denials and unresolved credits.
- ☐ Agree on historical A/R ownership and follow-up responsibilities.

Access & Data

- ☐ EHR / PM access provisioned.
- ☐ Clearinghouse and payer portal access provisioned.
- ☐ ERA / EFT, bank and remit workflows reviewed.
- ☐ Provider roster, payer IDs and enrollment data transferred.
- ☐ Reports and historical billing data retained according to policy / contract.

Workflow Handoff

- ☐ Charge capture and coding workflow documented.
- ☐ Eligibility / authorization workflow documented.
- ☐ Claim submission and rejection process documented.
- ☐ Denial / appeal workflow documented.
- ☐ Patient billing and statement workflow documented.

Go-Live

- ☐ Test claims submitted and accepted.
- ☐ ERA / payment posting validated.
- ☐ Daily issue log established.
- ☐ Old and new billing teams have clear cutover rules.
- ☐ First 30-day KPI / issue review scheduled.

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.