Onboarding Checklist for Medical Billing Client

1. **Practice Information:**
    - Practice name and address
    - Type of practice (e.g., individual practitioner, group practice)
    - Tax ID number and NPI (National Provider Identifier)
2. **Provider Details:**
    - Names of providers and their credentials
    - Specialty and any relevant licenses or certifications
3. **Clearinghouse Enrollment:**
    - Have you enrolled with a clearinghouse, or will it need to be set up?
4. **EDI Enrollment:**
    - Copy of W-9
5. **ERA Enrollment:**
    - Copies of Payer EOB's
6. **EFT Enrollment:**
    - Copy of Voided Check or Bank Letter
7. **Insurance Information:**
    - List of insurance providers accepted
    - Contracts or agreements with insurers
8. **Billing and Payment Policies:**
    - Payment terms and accepted payment methods
    - Policies for patient billing and collections
9. **Software and Systems:**
    - Existing billing software or systems in use
    - Electronic Health Record (EHR) system details, if applicable
10. **Historical Data:**
    - Previous billing reports and records (if transitioning from another billing service)

- Accounts receivable reports

11. **Compliance and Privacy Policies:**
    - Any internal compliance policies specific to the practice.
    - Copies of policies regarding patient privacy and HIPAA compliance.
12. **Contact Information:**
    - Primary contacts for billing inquiries and follow-ups
13. **Clearinghouse Enrollment:**
    - Have you enrolled with a clearinghouse, or will it need to be set up?
14. **Create Chargemaster (if needed)**
    - Setting prices for procedures.
15. **Logins for any Payor Websites:**
    - What payer sites will we need access to? (ex: UHC, Optum, Cigna, etc.)
16. **Fee Schedules:**
    - Are you with an IPA or contracted individually?
17. **Credentialing Information:**
    - Details on provider credentialing with insurance companies.
    - Status of any pending applications or renewals.
18. **Claims Denial Management Process:**
    - Guidelines for handling denials and appeals.
19. **Training Requirements:**
    - Information on training sessions for staff on billing processes and software.
20. **Reporting Preferences:**
    - Desired frequency and types of reports (financial, aging, etc.) the client expects.
21. **Dispute Resolution Process:**
    - Procedures for addressing any disputes that may arise.
22. **Backup Contacts:**
    - Additional contacts for key roles (billing, technical support, etc.) in case the primary contact is unavailable.
23. **Contact with Referring Providers:**
    - Information on how to communicate with referring providers for billing queries.
24. **Practice Policies:**
    - Any unique billing policies or payment plans the practice follows.