

Checklist for Evaluating Your Insurance Billing

	YES	NO	SOMEWHAT
1. On a patient visit, do you obtain all the necessary insurance information?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is every patient's current address and telephone number verified?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does staff have a good understanding of Medicare procedures?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Is every effort made to process all insurance claims the same day and in the mail the day of or the day after the patient's visit?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Is each unpaid claim followed up within 30 days?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Do insurance & billing clerks thoroughly understand CPT, ICD-9-CM, RBRVS, and HCPCS coding?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does staff understand assignment billing and know what can be collected directly from the patient?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Can billing staff explain and define allowable charges and co-insurance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Do billers take the proper recourse when a claim is not settled satisfactorily?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Do your patients understand their responsibility to pay their bills regardless of their health plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Does your practice use a standard CMS 1500 claim form and complete it entirely?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Do you file initial Workers' Compensation claims within 7 days of the first date of service along with a statement of services rendered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Does your practice prepare and send an attending physician statement with all industrial First Report of work Injury forms?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Does the front desk and billing department keep a journal of the Managed Care Plans that gives a synopsis of co-payments, referral requirements, and where x-rays, diagnostic tests and lab studies can be performed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Products related to this topic on website www.practicesupport.com include:

- [BC Advantage for Billing, Coding and Office Management](#)
- [The Physician Billing Process](#)
- [Billing & Collecting Tools for the Physician Office](#)