A WORKING CHECKLIST

A practical revenue cycle audit starter.

Choose a defined scope and a representative sample. Record what you inspected, what the evidence showed and what needs a closer review.

01 / Patient access and readiness

[ ] Trace the collection and review of registration and coverage details.

[ ] Check how authorization and enrollment questions reach an owner.

[ ] Verify that unresolved prerequisites remain visible to the next team.

02 / Claims and response handling

[ ] Trace documented services through charge entry and submission.

[ ] Separate submitted, accepted, rejected and adjudicated statuses.

[ ] Review how recurring edits are corrected at their source.

03 / Remittance and outstanding accounts

[ ] Follow a sample of payments and adjustments through reconciliation.

[ ] Inspect the evidence and next action in a sample of A/R notes.

[ ] Review recurring denial reasons and the accountable prevention owner.

04 / Management controls

[ ] Check metric definitions, reporting periods and source reconciliation.

[ ] Review access ownership, onboarding and documented handoffs.

[ ] Assign findings a priority, responsible owner and review date.

One decision to carry forward

Action: ____

Owner: __________________________ Review date: _____________________________

Use and adapt with your team. Keep completed account-level records in your organization's approved systems. These prompts do not replace current payer, program or internal requirements.