A WORKING CHECKLIST

The practice onboarding checklist.

Connect the operating model, system setup and people before the first account moves. Use fictional records for training and workflow demonstrations.

01 / Set the scope

- [ ] Document services, providers, locations and payer arrangements.
- [ ] Identify the accountable contact for each clinical and financial handoff.
- [ ] Agree on the reporting scope and the first operating-review date.

02 / Check readiness

- [ ] Confirm applicable enrollment and effective-date evidence.
- [ ] Check system configuration and role-appropriate access.
- [ ] Document the route for coverage, documentation and coding questions.

03 / Walk the complete workflow

- [ ] Trace a fictional encounter from registration to claim response.
- [ ] Demonstrate payment posting, reconciliation and balance follow-up.
- [ ] Confirm how a rejection, denial or missing prerequisite is assigned.

04 / Begin the operating rhythm

- [ ] Review initial exceptions, missing charges and unresolved dependencies.
- [ ] Use a small quality sample to check notes and next actions.
- [ ] Give every launch issue an owner, due date and completion condition.

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.