A WORKING CHECKLIST

The weekly billing operations review.

A short agenda for turning the week's exceptions into clear ownership. Bring the current queue view, a small quality sample and decisions that need help.

01 / See the work

[ ] Review queues by next action, age and responsible party.
[ ] Identify items waiting on another team or an external response.
[ ] Separate new exceptions from recurring unresolved issues.

02 / Inspect the evidence

[ ] Review a deliberate sample of completed account notes.
[ ] Check whether the action was supported and the next step is clear.
[ ] Identify one repeated gap that needs a workflow or teaching change.

03 / Make the decision

[ ] Assign an owner and due date to each unresolved dependency.
[ ] Record what will change, where it changes and who must know.
[ ] Escalate decisions beyond the team's authority with the needed context.

04 / Close the loop

[ ] Review the actions agreed in the previous meeting.
[ ] Check whether the change reduced the original issue.
[ ] Carry forward only items with a clear next action.

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.