



RCM Billing Checklist

Use the Quick Reference Guides as a tool for your Daily Workflow: [RCM Client Corner](#)

DAILY TASKS

- Balance Patient Payments in OP's Receipts tab for Previous Day, including merchant services transactions. *Path: Billing Center > Receipts*
- Check OP Messages: *Path: Communication > Phone*
- [Soft Scrub Superbills to ensure charge entry](#)
 - Change Billing Status to: Ready to bill
- Review and Correct Superbills on Hold: *Path: Billing > Billing Center > Superbills > Select "Hold"*
 - Change Stage to: Ready Bill Manually
- Review any unposted superbills for prior dates via the Superbills tab: *Path: Billing > Billing Center > Superbills > Select "Ready"*
- Instamed Client's: [Review Automated Billing Task for Credit Card Payment Errors](#)

WEEKLY TASKS

- Show Blank Billing Status *Path: Tracking>Show Blank Status button > 180 days*
- Verify Insurance Payments are received in the office's bank account, Use the Payment Confirmed Box in the ERA window to complete Bank reconciliation. *Path: Billing > Billing Center > ERA Payments > Click box for Payment Confirmed*
- [Scan paper EOBs to the non-patient directory \(NPD\)](#)
- [Review newborns pending insurance](#)
- Create Superbills for [No Shows /Cancellations](#) & [Hospitals Charges](#) as needed

MONTHLY TASKS

- Run Reports:
 - [Patient Accounts Receivable Aging](#)
 - [Billing Transaction](#) & [Reimbursement](#) analysis in Practice Analytics
 - "Patient Statement Count" SQL in database viewer to identify patients with 3 or more statements - [Quickstart](#) how to run and SQL