Billing Transition Planner

Before changing administrative billing responsibilities, record the work to be discussed, the responsible roles and the questions that need review. A completed worksheet is not permission to begin a transition.

Planning review date

Practice planning lead role

Proposed scope summary - high level only

Next review date

Work area	Current responsible role	Proposed responsible role - not yet authority	Boundary or question to review
New billing work			
Older insurance work / run-off			
Posting and reporting			
Practice information requests			
Unresolved ownership			

- ☐ Scope and older-work responsibilities have a named practice reviewer.
- ☐ Missing information and unresolved responsibilities are visible.
- ☐ Contract, security, clinical and financial questions are routed to the appropriate qualified reviewer.

These are discussion prompts, not proof that any agreement, transfer or service is approved.

Questions needing review

Planning aid only. Use high-level operational information and responsible roles. Do not enter patient, claim or account details, clinical information, credentials, bank information, system links or file paths. Keep supporting records and completed worksheets in approved secure practice systems. Do not upload or return this worksheet through a public website form.

This worksheet does not authorize a transition or any contract, access, system, payer or payment change. Qualified practice owners and reviewers retain their decisions. It is not clinical, coding, legal, financial or payer advice and does not guarantee collections or timing.

System ownership and review questions

Record who can confirm the administrative arrangements in approved systems. Do not record access details or perform changes from this sheet.

Area	Practice owner or authorized reviewer role	Evidence or question needing confirmation - summary only	Review status / next review date
Practice management / EHR reporting			
Clearinghouse / claim-status reporting			
Payer correspondence / status reporting			
Remittance / payment reporting			

Status: Not reviewed / Awaiting confirmation / Reviewed in approved system

"Reviewed" records a discussion state, not secure configuration or operational readiness. Use a high-level question or confirmation summary; no screenshots, files, links, credential values, identifiers or exports.

- ☐ Who is authorized to confirm ownership and permitted responsibilities?
- ☐ Which available report and reporting period can support the review?
- ☐ What remains uncertain, and who can answer it?

Report name and period - no file path

Question for the authorized reviewer

Separate authorized action

The planner does not instruct anyone to grant or revoke access, transfer records, or change payer, banking, EFT, clearinghouse or other settings. Any actual action requires the practice's separate authorized process.

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Open questions and planning decisions

Use aggregate work areas only. Do not include an individual account inventory or a dollar or collection forecast.

Work area / report period	Question or hold reason	Responsible review role	Next review date

Planning decisions

Planning question	Reviewer role	Decision / still open	Review date

Status: Questions open / Awaiting qualified review / Planning scope agreed

Illustrative planning example - not a client case or authorization

Question: Which role will review older-work reporting?
Responsible role: Practice manager.
Status: Questions open; scope not yet agreed.
Next review: Date set by the practice.

Carry unresolved items into the next planning discussion. Agreement on this worksheet does not terminate a contract, release data, change system access or authorize billing activity.

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