

The Ashez Group

Medical Billing Audit Workbook

25 Costly Mistakes Every Practice Should Avoid

Professional workbook for evaluating your revenue cycle, identifying revenue leaks, improving compliance, and maximizing reimbursement.

Welcome

Use this workbook monthly or quarterly to review your billing workflow, assign corrective actions, and monitor improvement over time.

Who it's for: Physicians, Practice Managers, Billing Teams, Administrators.

Revenue Leak Self-Assessment

Question	Yes	No
Claim denials increasing?	☐	☐
Days in A/R above target?	☐	☐
Eligibility verified every visit?	☐	☐
Prior authorizations tracked?	☐	☐
Underpayments reviewed?	☐	☐
Coding audited quarterly?	☐	☐
Documentation supports medical necessity?	☐	☐
Credentialing current?	☐	☐
KPIs monitored monthly?	☐	☐
Denials analyzed by root cause?	☐	☐

25-Point Medical Billing Audit Checklist

Audit Area	Pass	Needs Improvement	Priority	Notes
Patient Demographics	■	■	H/M/L	_____
Insurance Eligibility	■	■	H/M/L	_____
Prior Authorization	■	■	H/M/L	_____
Referrals	■	■	H/M/L	_____
Provider Credentialing	■	■	H/M/L	_____
CPT Coding	■	■	H/M/L	_____
ICD-10 Coding	■	■	H/M/L	_____
HCPCS Coding	■	■	H/M/L	_____
Modifier Usage	■	■	H/M/L	_____
NCCI Edits	■	■	H/M/L	_____
Medical Necessity	■	■	H/M/L	_____
Documentation	■	■	H/M/L	_____
E/M Coding	■	■	H/M/L	_____
Time-Based Services	■	■	H/M/L	_____
Charge Capture	■	■	H/M/L	_____
Charge Lag	■	■	H/M/L	_____
Claim Scrubbing	■	■	H/M/L	_____
Timely Filing	■	■	H/M/L	_____
Claim Acceptance	■	■	H/M/L	_____
Payment Posting	■	■	H/M/L	_____
ERA/EOB Review	■	■	H/M/L	_____
Underpaid Claims	■	■	H/M/L	_____
Accounts Receivable	■	■	H/M/L	_____
Denial Management	■	■	H/M/L	_____
Compliance & Staff Training	■	■	H/M/L	_____

Revenue Cycle KPI Dashboard

KPI	Target	Current	Goal
Clean Claim Rate	_____	_____	_____
First-Pass Acceptance	_____	_____	_____
Days in A/R	_____	_____	_____
Net Collection Rate	_____	_____	_____
Gross Collection Rate	_____	_____	_____
Denial Rate	_____	_____	_____
Charge Lag	_____	_____	_____
Underpayment Rate	_____	_____	_____
A/R >90 Days	_____	_____	_____
Average Reimbursement Time	_____	_____	_____

Denial Tracking Worksheet

[illegible]

Revenue Recovery Action Plan

Problem: _____

Impact: _____

Owner: _____

Target Completion Date: _____

Recommended Solution:

[illegible]

Practice Audit Scorecard

Patient Registration: _____

Coding: _____

Documentation: _____

Claims: _____

Payments: _____

Compliance: _____

Accounts Receivable: _____

Credentialing: _____

KPIs: _____

Overall Score (/100): _____

About The Ashez Group

The Ashez Group provides medical billing, revenue cycle management, provider credentialing, coding compliance, denial management, and practice consulting for healthcare organizations across the United States.

Free Medical Billing Audit Consultation

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