



RCMEASY GUIDE

Choosing a Medical Billing Partner: A Due-Diligence Checklist

What to ask before you sign.

Why This Choice Matters

A billing partner touches your cash flow, your patients' financial experience, and your compliance exposure all at once. Vetting one properly upfront costs far less time and revenue than switching again a year from now.

Pricing & Contract Terms

Is pricing a flat fee or a percentage of collections? What's included versus billed separately? What are the cancellation terms, and is there a minimum commitment? Get these answers in writing before comparing any two partners on price alone.

Reporting & Visibility

Can you see claim-level and KPI-level data in real time, or only in a periodic summary email? Who do you contact when something looks off, and how quickly do they typically respond? A partner that gives real-time access to your own numbers is one you can actually hold accountable.

Transition & Onboarding

How is data migration handled? How is payer credentialing managed during the switch, so claims don't stall mid-transition? What's the realistic timeline before claims are flowing normally again? A well-run transition manages these in parallel with your existing workflow, not sequentially after it stalls.

Compliance & Data Security

Will they sign a Business Associate Agreement without hesitation? How is PHI access limited internally to only the people working your account? What administrative, technical, and physical safeguards do they describe — specifically, not just as a checkbox claim?

The Scorecard

Rate each prospective partner 1–5 across four categories: Pricing Transparency, Reporting Visibility, Onboarding Support, and Compliance Posture. A partner that scores well across all four — not just on price — is the one worth trusting with your revenue cycle.

Category	Score (1–5)	Notes
Pricing Transparency		
Reporting Visibility		
Onboarding Support		
Compliance Posture		

NEXT STEP**Talk to an RCM Expert**

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