

# Medical Billing Audit Checklist

## Patient Information Verification

- Ensure all patient details (name, DOB, address, insurance details) are accurate and up-to-date.

## Service and Procedure Codes

- Confirm that the correct Current Procedural Terminology (CPT) and International Classification of Diseases (ICD) codes are used.
- Check for upcoding or undercoding.

## Date and Time Stamps

- Verify the dates of service.
- Ensure no overlapping or missing dates.

## Billing for Non-Covered Services

- Ensure services billed are covered by the patient's insurance.

## Duplicate Billing

- Check for any repeated charges for the same service on the same date.

## Modifier Usage

- Ensure appropriate use of billing modifiers.

## Charge Entry

- Confirm all rendered services are entered and billed.
- Check for any missed charges.

## Claim Submission

- Ensure timely submission of claims.

- Verify claims are submitted to the correct insurance company.

### **Payment Posting**

- Confirm payments, adjustments, and denials are posted correctly.
- Check for any unapplied payments or credits.

### **Denial Management**

- Review reasons for denials.
- Ensure timely follow-up on denied claims.

### **Patient Balances**

- Verify accuracy of patient balances.
- Ensure timely sending of statements to patients.

### **Compliance with Regulations**

- Ensure adherence to state and federal billing regulations.
- Confirm compliance with HIPAA privacy and security standards.

### **Documentation**

- Ensure services billed are supported by necessary documentation in the patient's medical record.
- Confirm signatures, where required, are present.

### **Referral and Authorization**

- Check if necessary referrals or pre-authorizations were obtained and are valid.

### **Contractual Adjustments**

- Ensure adjustments align with payer contracts.

### **Write-offs**

- Review and confirm the legitimacy of any write-offs.

Using this checklist, healthcare providers can conduct a comprehensive audit of their medical billing processes, ensuring accuracy, compliance, and optimized revenue collection.