

Outsourced Billing Vetting Checklist

How to Use This Checklist:

1. **Request Interviews:** Write the company name in the space under “Company A” and so on. Use the checklist as a guide for your conversation.
2. **Take Notes:** For a side-by-side comparison, jot down key responses and/or your impressions.
3. **Consider Your Choices:** You should not feel pressured to make a decision during the interview. Take time to compare your choices, “crunch the numbers,” and follow up with candidates as needed.
4. **Capacity & Timeline:** Some billers will have limited spots open to new clients and may have their own timeline goals. Though you should not feel pressured to say “yes” right away, such billers may not be able to hold a spot for you if another provider says yes before you.
5. **Say Yes:** When it feels right, choose the company that aligns best with your timeline, goals, budget, and practice needs.

Criteria	Details to Assess	Company A	Company B
Experience	Does the company have experience with mental health billing? What portion of their clientele are mental health providers?		
	How long have they been in business?		
	Do they understand CPT codes specific to therapy and psychiatry?		
Tech	If it’s a requirement for you, do they integrate with your current EHR system? (e.g., TheraNest, SimplePractice)		
Services	What services are included? (e.g., insurance verification, claims submission, denial management, patient billing, etc)		

	How often are claims submitted?		
	How do they handle denied claims?		
Fee Structure	What is their fee structure?		
	Are there any setup or additional fees?		
Transparency & Reporting	How often will you receive reports on claims status, collections, and aging?		
	Can you access data in real-time through a client portal?		
	Are they transparent about follow-ups and unresolved claims?		
Communication & Support	What is their typical response time for inquiries?		
	Do they assign a dedicated account manager?		
	How do they handle urgent issues?		
Compliance & Security	Are they HIPAA-compliant? Do they sign a BAA with you? With their vendors?		
	Do they have processes for protecting patient data?		
	Have they experienced any security breaches? How were they handled?		
References & Reputation	Can they provide references from other mental health providers?		
	What do online reviews say about their services? (Google, LinkedIn, etc.)		

Onboarding	How long does it take to transition to their services?		
	Will they assist with claim transfers and outstanding AR (accounts receivable)?		
	Do they provide training or orientation for you and your staff?		
Termination Policy	What is the contract length? Are there penalties for early termination?		
	How will they handle data transfer if you switch billing providers?		
Vibe Check	How did you feel talking with them? Supported? Dismissed?		
More Questions			
More Questions			
More Questions			



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