**UMP SOLUTIONS**

# Prepare for a billing review

A business-level checklist for practices, facilities and laboratories. No patient records are needed for the first conversation.

### *Name the issue*

Current claim preparation, recurring denials, older receivables, enrollment or reporting: choose the main problem and the decision your team needs to make.

### *Map the work*

List the care settings or specialties, clinicians, billing entities and locations. Keep professional and facility responsibilities distinct.

### *Identify your systems*

Note the EHR, practice management system, clearinghouse and reports or exports available. Do not send credentials.

### *Describe volume and backlog*

Use approximate work volume and aging categories. Bring aggregate or redacted information, not patient-level records.

### *Review the payer mix*

Identify the Medicare, Medicaid and commercial workflows involved. Discuss workers compensation or personal injury accounts separately if relevant.

### *Clarify responsibilities*

Who supplies missing records? Who approves changes? Which tasks should stay with your staff, and which should UMP review?

### *Define useful reporting*

Choose the period, account population and categories you want to see. Distinguish submission acceptance, payer response and payment.

### *Agree the next step*

Confirm the proposed scope, fee basis, contacts, reporting and any required records or access arrangements before work begins.

Call 346-616-0008 or visit the Contact page to request a review. A scheduling preference is not a confirmed appointment.