

# A/R follow-up checklist

Use at the start and close of a follow-up session. The goal is a verified status and a clear next action for each assigned item.

Owner / team: \_\_\_\_\_ Review date / period: \_\_\_\_\_

Tick completed checks. Record exceptions and reasons for any not-applicable steps in the approved work log.

## Confirm the work

- ☐ Record the snapshot date, payer scope, aging basis and balance basis. Separate credit balances from unpaid debit balances.
- ☐ Reconcile aging buckets to the source total. Resolve duplicate work items and confirm who owns the queue.
- ☐ Check the latest posting and payer status in the approved system before taking action. An older balance is not proof of recoverability.

## Choose the next action

- ☐ Prioritize verified filing or response deadlines, then status, balance and age. Record the rule source and verification date where a deadline applies.
- ☐ Select the supported action: status inquiry, correction, documentation request, appeal review or another approved step. Avoid duplicate submissions.
- ☐ Assign one owner, a specific next action and a follow-up date. Keep source evidence in the approved system.

## Close the session

- ☐ Record the action taken, contact or submission evidence, and expected response. Escalate missing information or an uncertain deadline.
- ☐ Close an item only against a supported outcome. Carry unresolved items into the next queue with an owner and review date.

Unresolved action / owner / due date \_\_\_\_\_

Review completed by / next review \_\_\_\_\_

Use the companion CSV to track work over time. Do not estimate recoverable revenue from the aging report alone.

Companion CSV: [ar-follow-up-log-template.csv](#)

Related guidance: [HHS minimum necessary guidance](#). Checked October 20, 2026.