

Billing handoff checklist

Use when changing a billing team, vendor or system. The goal is an agreed handoff with tested access and no unassigned open work.

Owner / team: _____ Review date / period: _____

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

Before the handoff

- ☐ Agree the cutover date, scope, outgoing and incoming owners, acceptance criteria and escalation contacts. Document who owns older A/R after cutover.
- ☐ Inventory open rejections, denials, appeals, balances and posting exceptions. Preserve a dated snapshot and verified deadlines in the approved system.
- ☐ Approve required user roles and test access to EHR, practice-management, payer and clearinghouse tools. Do not share passwords in this checklist.

Test the transfer

- ☐ Confirm payer and trading-partner enrollments and authorizations. Check HETS relationships where applicable; do not assume vendor access transfers.
- ☐ Test the agreed workflows and retain acceptance evidence. Confirm ERA routing, authorized EFT ownership and how deposits will be reconciled.
- ☐ Verify usable exports, report definitions, record availability and retention or return responsibilities. Document unresolved differences before acceptance.

Accept and follow through

- ☐ Assign every transferred work item to one team with a next action. Agree how to prevent duplicate submissions and follow-up.
- ☐ Obtain acceptance, schedule a post-cutover reconciliation, and change or terminate access at the agreed time. Escalate critical unresolved items before proceeding.

Unresolved action / owner / due date _____

Review completed by / next review _____

Use the companion CSV for workstream owners, evidence, acceptance tests and dates. Follow the practice's approved access and banking-change processes.

Companion CSV: [billing-transition-checklist-template.csv](#)

Related guidance: [CMS HETS enrollment and vendor relationships](#). Checked October 20, 2026.