



## Urgent Care Billing: Best Practices Scorecard

■ MONTE SANDLER

When it comes to measuring your financial performance, metrics translate the actions of others into insight. They provide visibility into the efficacy of your overall billing process. But while they may shine a light on where you need to improve, they don't tell you how to do it.

For a better understanding of how well your clinic is optimizing the billing process, look at your everyday practices. Our revenue cycle management (RCM) experts compiled 10 questions that reflect how well you're set up to be paid timely and correctly.

Complete the evaluation below to see whether your clinic's standard practices are proven best practices. Refer to the scoring section to see what else can help you get from delayed to paid.

### Self Evaluation

**1. For patients that have credit cards, how often do you use a credit card on file to resolve outstanding patient balances?**

Answer	Score
95%-100%	+4
75%-95%	+3
Less than 75%	+2
I don't use credit card on file	+1

**2. How confident is your staff in being able to ask for payment on outstanding balances?**

Answer	Score
Extremely	+4
Somewhat	+3
Not very	+2
No idea	+1



Monte Sandler is Executive Vice President, Revenue Cycle Management of Experity (formerly DocuTAP and Practice Velocity).

**3. When insurance verification tells you a patient doesn't have insurance, how often does your staff create a payment plan with the patient or collect payment at time of service?**

Answer	Score
95%-100%	+4
75%-95%	+3
Less than 75%	+2
I don't use real-time eligibility	+1

**4. How often do you review your Days Sales Outstanding (DSO) metric?**

Answer	Score
Monthly	+4
Quarterly	+3
1-2 times a year	+2
I don't know what this is	+1

**5. What percentage of your outstanding accounts receivable over 120 days old do you follow up on each month?**

Answer	Score
80%-100%	+4
60%-79%	+3
40%-59%	+2
0%-39%	+1

**6. How frequently are you reviewing payer enrollment plans with your clearinghouse?**

Answer	Score
Monthly	+4
Quarterly	+3
1-2 times a year	+2
Not annually	+1

**7. How frequently do you run month-end financial performance reports?**

Answer	Score
Monthly	+4

Quarterly	+3
1-2 times a year	+2
Not annually	+1

**8. What percent of your patients with outstanding bills receive text balance reminders?**

Answer	Score
95%-100%	+4
75%-94%	+3
Less than 75%	+2
I don't have this ability	+1

**9. About what percent of your patients use electronic registration before their visit?**

Answer	Score
95%-100%	+4
75%-94%	+3
Less than 75%	+2
I don't have this ability	+1

**10. How often do you review your monthly rejections and denials for root cause?**

Answer	Score
Daily	+4
Weekly	+3
Monthly	+2
Never	+1

**Scoring Analysis**

Tally your answers above and find where your score fits in below. Feel free to check out all the resources linked in this section no matter where you fall on the scale. They're free!

**37-40:** WOW! You're nailing these billing best practices! It might be time to act as more of a mentor than a mentee. If you're an Experity customer, the company has a place where you can connect with other experts, build your personal brand, and share your expertise with a larger audience. Consider joining the Experity A List. (For more information: <https://www.experityhealth.com/alist/>)

**30-36:** Great! You're generally executing good-to-best practices. If you want to refine your processes, make sure you're taking advantage of automation in things like patient registration, text balance reminders, and real-time eligibility (RTE). This is covered in a blog from Experity, called Urgent Care Billing Optimization: How to Improve Your RCM (<https://www.experityhealth.com/blog/how-to-optimize-your-urgent-care-billing-process/>). The company also provides monthly billing tips like those found in How to Improve E/M Coding Accuracy and Billing Dos and Don'ts ([https://www.experityhealth.com/blog/how-to-improve-e-m-](https://www.experityhealth.com/blog/how-to-improve-e-m-coding-accuracy-and-billing-dos-and-donts/)

[coding-accuracy-and-billing-dos-and-donts/](#)). These may be especially helpful as you navigate confusing coding changes.

**25-30:** You're so close to being on track. Looks like you're leaning away from recommended practices on at least a few things. So, all around, you probably have room to improve. If you have already read the blog mentioned above on how to evaluate your billing process, you may be interested in *10 KPIs to Watch in Your Urgent Care*, an e-book on key performance indicators available at <https://www.experityhealth.com/ebooks/10-kpis-to-watch-in-your-urgent-care/>. It explains how to calculate 10 foundational metrics and the factors that impact each so you can determine the best action to take. I would also recommend you get a free billing analysis to dive into the specific areas in which you can improve and what would help the most. (For more information: <https://www.experityhealth.com/explore-billing-analysis/>.)

**10-25:** Definite room for improvement. You seem to either be unfamiliar with many of these practices or simply not sure where you're at. But the good news is you can improve right away! The easiest step to take is to sign up for the free billing analysis described in the previous paragraph. Experity experts will evaluate your clinic and clearly explain what steps can help you improve your score. The company also offers a downloadable guide to billing and operations that covers common billing mistakes, key performance indicators (KPIs), best practices, and more. That's available at <https://www.experityhealth.com/ebooks/urgent-care-billing-operations-guide/>. And if you want those KPIs explained a bit better, you can watch an on-demand webinar that covers them at <https://www.experityhealth.com/webinars/urgent-care-kpis/>.

There is no magical way to fix your RCM performance. The best approach is to take it one step at a time and try to get better every day. Remember, if you can't measure, you can't manage. ■

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