



Healthcare Revenue Cycle Management Audit Checklist 2026

Patient Access & Front-End Operations

Verification of insurance eligibility, demographic accuracy, and point-of-service collection protocols.

Audit Date

Enter date...

Auditor Name

Write something...

Department/Clinic Location

- ☐ Primary Care
- ☐ Emergency Department
- ☐ Specialty Clinic
- ☐ Inpatient Unit

Insurance Verification Status

- ☐ Active Eligibility Confirmed
- ☐ Prior Authorization Obtained
- ☐ Co-pay/Deductible Identified
- ☐ Secondary Insurance Verified

Patient Error Rate (%)

Enter a number...

Discrepancies Found in Demographic Data

Write something...

Sample Verification Documentation

 Upload File

Compliance Officer Sign-off

Medical Coding & Documentation Accuracy

Audit of ICD-10/CPT coding precision, clinical documentation integrity, and physician query workflows.

Coding Accuracy Rate (%)

- ☐ 95% or higher
- ☐ 90% - 94%
- ☐ 85% - 89%
- ☐ Below 85%

Identified Coding Discrepancies

- ☐ Upcoding
- ☐ Unbundling
- ☐ Incorrect Modifier Usage
- ☐ Missing Documentation Support
- ☐ Incomplete Clinical Notes

Physician Query Volume

Write something...

Audit Completion Date

Enter date...

Corrective Action Plan (CAP) Notes

Write something...

Coding Audit Evidence/Samples

 Upload File

Auditor Verification

Claim Submission & Clearinghouse Scrubbing

Review of claim scrubbing processes, error rejection rates, and timely electronic submission standards.

Audit Date

Enter date...

Claim Rejection Rate (%)

- ☐ 0-5%
- ☐ 5-10%
- ☐ 10-20%
- ☐ >20%

Common Rejection Reason Identified

- ☐ Invalid Patient Demographics
- ☐ Missing/Invalid Provider NPI
- ☐ Coding Inconsistency
- ☐ Duplicate Claim Submission
- ☐ Insurance Eligibility Mismatch

Clearinghouse Error Log Reference ID

Write something...

Corrective Action Plan for Recurring Denials

Write something...

Claim Scrubbing Report Attachment

 Upload File

Revenue Cycle Manager Review Signature

Accounts Receivable (A/R) & Denials Management

Analysis of denial root causes, follow-up timelines for aged claims, and credit balance resolution.

Current Days in A/R

Enter a number...

Primary Denial Reason Category

- ☐ Registration/Eligibility Error
- ☐ Coding/Medical Necessity
- ☐ Duplicate Claim
- ☐ Missing Documentation
- ☐ No Authorization

Denial Mitigation Actions Taken

- ☐ Resubmitted Corrected Claim
- ☐ Appealed with Medical Records
- ☐ Contacted Payer Representative
- ☐ Adjusted/Written Off

Root Cause Analysis Summary

Write something...

Audit Completion Date

Enter date...

Revenue Cycle Auditor Signature

Payment Posting & Reconciliation

Verification of ERA/EOB processing, cash posting accuracy, and bank reconciliation procedures.

Audit Completion Date

Payment Posting Method

- ☐ ERA (Electronic Remittance Advice)
- ☐ Manual Entry
- ☐ Paper Check

Total Amount Reconciled

Discrepancies Identified

- ☐ Unapplied Credits
- ☐ Unidentified Deposits
- ☐ Short-pays/Underpayments
- ☐ Duplicate Posting

Discrepancy Resolution Notes

Write something...

Reconciliation Report Attachment

 Upload File

Auditor Verification Signature

Patient Billing & Collections

Review of patient statement accuracy, payment plan administration, and communication of out-of-pocket responsibilities.

Patient Statement Error Rate (%)

Write something...

Total Unresolved Patient Balances

Enter a number...

Billing Cycle Audit Date

- ☐ Monthly Review
- ☐ Quarterly Review
- ☐ Annual Audit

Identified Billing Discrepancies

- ☐ Incorrect Patient Demographics
- ☐ Inaccurate Insurance Information
- ☐ Unapplied Credits
- ☐ Missing Co-pay/Deductible Data
- ☐ Incorrect CPT/ICD Mapping

Corrective Action Plan Notes

Write something...

Auditor Authentication

Compliance & Regulatory Oversight

Ensuring adherence to HIPAA privacy standards, CMS regulations, and payer-specific contractual requirements.

Compliance Audit Scope

- ☐ HIPAA Privacy & Security
- ☐ CMS Coding Compliance
- ☐ OIG Compliance Program
- ☐ State-Specific Healthcare Regulations

Last Compliance Review Date

Enter date...

Identified Regulatory Risks

- ☐ Data Privacy Breach Risk
- ☐ Improper Coding/Upcoding Risk
- ☐ Incomplete Patient Consent
- ☐ Credentialing Expiration

Corrective Action Plan (CAP) Details

Write something...

Supporting Compliance Documentation

 Upload File

Compliance Officer Attestation

Revenue Cycle Performance Metrics (KPIs)

Evaluation of Days in A/R, Net Collection Rate, and Clean Claim Rate benchmarks for 2026.

Days in Accounts Receivable (A/R)

Net Collection Rate (%)

Clean Claim Rate (%)

Denial Rate (%)

Audit Period Date

- ☐ Q1 2026
- ☐ Q2 2026
- ☐ Q3 2026
- ☐ Q4 2026

Supporting Financial Report

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Auditor Verification

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🏁 Finish

🛠️ Generate Sample Report