

Billing Staff Onboarding Checklist

A step-by-step guide to getting new billing employees fully trained and ready

Medical Billing & Practice Management | Version 1.0

How to use this checklist: This checklist is for managers and supervisors. Start it on the employee's first day and complete each section by the deadlines shown. Both the manager and the new employee should sign off on completed sections. Keep a copy in the employee's training file.

Employee Name:	_____	Start Date:	_____
Job Title:	_____	Department:	_____
Supervisor:	_____	Employee ID:	_____

WEEK 1 — First Day & Office Orientation (Days 1–5)

Goal: The new employee feels welcome, has access to everything they need, and understands the basics.

☐	Give the employee a tour of the office and introduce them to all team members.
☐	Set up their computer, phone, and email account before they arrive.
☐	Provide login access to the Practice Management System (PMS) and EHR. <i>Start with 'read-only' access. Add full access after training is complete.</i>
☐	Review the employee handbook and have them sign the acknowledgment form.
☐	Explain the daily schedule, break times, dress code, and parking.
☐	Review the organizational chart so they know who to go to with questions.
☐	Introduce them to their assigned training buddy or mentor. <i>A training buddy is a more experienced staff member who helps answer day-to-day questions.</i>
☐	Provide a list of important phone numbers and contact names (payers, clearinghouse, etc.).
☐	Complete all required HR paperwork (I-9, W-4, direct deposit, benefits enrollment).
☐	Assign and complete HIPAA privacy and security training.
☐	Complete OIG compliance and fraud/abuse awareness training.
☐	Review and sign the confidentiality agreement.

WEEK 2 — Billing Basics & Systems Training (Days 6–10)

Goal: The employee understands the revenue cycle and can navigate the billing system.

☐	Explain the full revenue cycle from patient registration to final payment. <i>Revenue cycle = the process of collecting money for healthcare services. It starts when a patient schedules an appointment and ends when the balance is paid in full.</i>
☐	Train on the Practice Management System (PMS): patient demographics, scheduling, and insurance entry.
☐	Explain how to verify patient insurance eligibility before a visit. <i>Eligibility verification = checking that the patient's insurance is active and covers the service.</i>
☐	Train on how to enter and update patient insurance information correctly.
☐	Explain what a superbill or charge ticket is and how it flows into billing. <i>A superbill is the form providers use to document what service was done and what diagnosis applies.</i>
☐	Review the top 20 CPT codes and diagnosis codes used by our practice.
☐	Explain the difference between primary and secondary insurance.
☐	Train on how to read an Explanation of Benefits (EOB) and Electronic Remittance Advice (ERA). <i>EOB/ERA = the document an insurance company sends to explain what they paid and why.</i>
☐	Explain what a clearinghouse is and how claims are sent electronically.
☐	Show how to look up payer-specific billing rules on their websites.

WEEK 3 — Claims Submission & Denial Management (Days 11–15)

Goal: The employee can submit clean claims and handle basic denials.

☐	Train on how to create and submit a CMS-1500 claim form. <i>CMS-1500 is the standard paper/electronic form used to bill most insurance companies for professional services.</i>
☐	Explain the most common claim errors and how to avoid them. <i>Common errors: wrong date of service, missing modifier, wrong place of service code, inactive insurance.</i>
☐	Show how to check claim status in the PMS and on payer portals.
☐	Explain what a claim rejection is vs. a claim denial. <i>Rejection = claim was never processed (fix and resubmit). Denial = claim was processed but not paid (appeal if incorrect).</i>
☐	Train on the denial management workflow: identify, research, correct, resubmit, appeal.
☐	Explain timely filing limits for our top 5 payers. <i>Timely filing = the deadline to submit a claim. If you miss it, the claim cannot be paid.</i>
☐	Train on how to write a basic appeal letter.
☐	Explain the coordination of benefits (COB) process for patients with two insurances.
☐	Show how to post payments (both manual and electronic ERA posting).
☐	Explain what a write-off is and when it is appropriate to write off a balance.

WEEK 4 — Patient Billing & Collections (Days 16–20)

Goal: The employee can handle patient balance billing and collections professionally.

☐	Train on how and when patient statements are sent.
☐	Explain what a patient's deductible, copay, and out-of-pocket maximum means. <i>Deductible = amount patient pays before insurance starts paying. Copay = fixed amount patient pays per visit.</i>
☐	Train on how to handle patient billing questions and complaints over the phone.
☐	Explain our financial hardship policy and payment plan options.
☐	Train on how to set up a patient payment plan in the PMS.
☐	Explain what accounts receivable (AR) aging means and why it matters. <i>AR aging = how long money has been owed. Older balances are harder to collect.</i>
☐	Show how to identify self-pay accounts and the process for following up.
☐	Explain when and how to send accounts to a collection agency.
☐	Clarify rules about what we can and cannot say when contacting patients about balances. <i>The Fair Debt Collection Practices Act (FDCPA) has strict rules about patient contact.</i>
☐	Train on how to process credit card payments securely.

WEEKS 5 & 6 — Supervised Practice & Performance Review (Days 21–30)

Goal: The employee works independently under supervision and receives feedback.

☐	Employee completes real billing tasks while supervisor reviews their work daily.
☐	Manager reviews and discusses 30-day performance with the employee.
☐	Employee can submit clean claims with less than 5% error rate.
☐	Employee handles basic denial types independently.
☐	Employee answers patient billing calls without assistance.
☐	Employee knows how to escalate complex issues to the right person.
☐	Employee has set individual 60-day and 90-day goals with their manager.
☐	30-day onboarding checklist is signed by both employee and manager.

Employee Signature:	Manager Signature:	Date Completed:
Printed Name:	Printed Name:	90-Day Check-In Date: