



Revenue Gap Checklist

10 checks to find where revenue may be stalling | Part 1 of 2

PRACTICE

REVIEWED BY

DATE

MARK ONE STATUS PER ITEM. ADD A BRIEF FINDING OR NEXT STEP.

1 A/R aging & stalled balances

Review aging by payer and provider. Identify older, untouched, or repeatedly delayed balances and confirm the next follow-up action.

Gather: A/R aging report and account follow-up history.

☐ Needs action

☐ In control

☐ N/A

Finding / next step

2 Claim submission & rejections

Confirm charges reach the payer and rejected claims are corrected promptly. Check for unsubmitted claims, failed transmissions, and unresolved edits.

Gather: charge, submission, clearinghouse, and rejection reports.

☐ Needs action

☐ In control

☐ N/A

Finding / next step

3 Denial patterns & prevention

Group denials by reason, payer, service, and recurrence. Identify the workflow causing repeat denials and whether corrected claims are accepted.

Gather: denial log, payer responses, and corrected-claim results.

☐ Needs action

☐ In control

☐ N/A

Finding / next step

4 Appeals & follow-up deadlines

Check unresolved denials for payer-specific deadlines, supporting records, an assigned owner, and documented follow-through.

Gather: appeal tracker, payer notices, and submission receipts.

☐ Needs action

☐ In control

☐ N/A

Finding / next step

5 Payer payments & underpayments

Compare allowed amounts and payments with the applicable contract or fee schedule. Track unexplained reductions and unresolved variances.

Gather: payer contracts, remittances, and variance reports.

☐ Needs action

☐ In control

☐ N/A

Finding / next step

Use aggregate findings here; keep patient-level records in your approved practice systems.



Revenue Gap Checklist

10 checks to find where revenue may be stalling | Part 2 of 2

Use your own reports, payer requirements, and practice workflow to assess each item.

Mark one status, record the finding, and carry the most important gaps to page 3.

MARK ONE STATUS PER ITEM. ADD A BRIEF FINDING OR NEXT STEP.

6 Charge capture & missing services

Reconcile completed visits and services to recorded charges. Review unbilled encounters, missing charges, and delays between service and billing.

Gather: encounter lists, charge reports, and unbilled work queues.

☐ Needs action ☐ In control ☐ N/A

Finding / next step

7 Coding & documentation alignment

Check whether documentation supports billed services and whether coding questions are resolved before submission. Flag recurring gaps for qualified review.

Gather: a sample of records, billed codes, and coding query logs.

☐ Needs action ☐ In control ☐ N/A

Finding / next step

8 Payment posting & reconciliation

Match remittances and deposits to posted payments. Review unapplied cash, unexplained adjustments, refunds, and unresolved posting differences.

Gather: ERA/EOB files, deposit records, and posting reports.

☐ Needs action ☐ In control ☐ N/A

Finding / next step

9 Eligibility, benefits & authorization

Review whether coverage and required authorizations are checked for the service provided. Track preventable failures and inconsistent handoffs.

Gather: verification records, authorization logs, and related denials.

☐ Needs action ☐ In control ☐ N/A

Finding / next step

10 Credentialing & payer enrollment

Confirm provider enrollment, location and payer details are current. Identify pending applications or enrollment issues affecting claim payment.

Gather: payer rosters, enrollment tracker, and revalidation dates.

☐ Needs action ☐ In control ☐ N/A

Finding / next step

Use aggregate findings here; keep patient-level records in your approved practice systems.



Priority Worksheet

Turn your findings into three accountable next steps

Flag approaching payer deadlines first. Then prioritize repeat problems, larger revenue exposure, and actions your team can complete. Use the checklist item number to connect each priority to its finding.

PRIORITY 1 = ADDRESS FIRST | PRIORITY 2 = NEXT | PRIORITY 3 = FOLLOW

ITEM #	GAP / ISSUE	
PRIORITY 1		
CURRENT RESULT / REVENUE EXPOSURE	SUCCESS MEASURE / TARGET	
NEXT ACTION	OWNER	DUE DATE

Baseline and target example: unresolved rejections, aged balances, or posting variances.

ITEM #	GAP / ISSUE	
PRIORITY 2		
CURRENT RESULT / REVENUE EXPOSURE	SUCCESS MEASURE / TARGET	
NEXT ACTION	OWNER	DUE DATE

Baseline and target example: unresolved rejections, aged balances, or posting variances.

ITEM #	GAP / ISSUE	
PRIORITY 3		
CURRENT RESULT / REVENUE EXPOSURE	SUCCESS MEASURE / TARGET	
NEXT ACTION	OWNER	DUE DATE

Baseline and target example: unresolved rejections, aged balances, or posting variances.

NEXT REVIEW DATE

Review progress, document the outcome, and reset priorities.