Switching bureau & new practice checklists

Print them, pin them up, or share them with your rooms. No sign-up needed.

Switching billing bureau checklist

- [ ] Find your notice period and terms with your current bureau
- [ ] Confirm which billing software and data you have access to
- [ ] List open claims and the age of your debtors
- [ ] Agree who finishes off older claims during the parallel run
- [ ] Confirm practice numbers, tariffs and billing preferences
- [ ] Agree how theatre lists and notes will be sent
- [ ] Tell your rooms staff how patient queries will be handled
- [ ] Agree the date of the first month-end report

Opening a new practice checklist

- [ ] HPCSA registration and practice number in place
- [ ] Billing software chosen and set up
- [ ] Tariffs and fee policy decided

- [ ] Process for authorisations agreed with your rooms
- [ ] Patient fee information and consent forms ready
- [ ] Bank account and reconciliation process set up

General guidance only. Scheme rules differ by scheme and option. © Forte Medical Solutions.

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