Fee change rollout plan

A practical California working record - editable in Word

USE IT THIS WAY	DO NOT MISTAKE IT FOR THIS
Use before announcing a fee change or altering a sliding-scale, package, or recurring-care assumption.	This does not select a fee, determine contract rights, or create client-specific financial advice.

Working record

Prepared by	
Reference (no names)	
Date opened	
Next review date	

Six review points

1	**[ ] Define what changes** Record affected services, clients, effective dates, exceptions, and the business basis for the decision. **Your record:** _____ **Source:** IRS: recordkeeping for individuals
2	**[ ] Review existing agreements** Identify notice periods, payer terms, employee or contractor arrangements, and other written constraints. **Your record:** _____ **Source:** CMS: No Surprises Act provider resources
3	**[ ] Update estimate workflows** Determine which self-pay estimates must be revised and when they must be delivered. **Your record:** _____ **Source:** CMS: No Surprises Act provider resources
4	**[ ] Align every system** Reconcile consent, website, scheduler, EHR, superbills, statements, payment tools, and internal scripts. **Your record:** _____ **Source:** HHS: Privacy Rule guidance

5	**[ ] Plan individual communication** Choose timing, channel, accessibility, and a route for questions without exposing client information. **Your record:** _____ **Source:** HHS: Privacy Rule guidance

6	**[ ] Audit the first billing cycle** Check charges, exceptions, estimates, receipts, and complaints against the approved plan. **Your record:** _____ **Source:** IRS: recordkeeping for individuals

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- IRS: recordkeeping for individuals
- CMS: No Surprises Act provider resources
- HHS: Privacy Rule guidance

Educational information only. Not legal, clinical, tax, billing, or regulatory advice. Recheck every source before relying on an older saved copy. Do not put client-identifying information in a copy you cannot secure.