Payer contract offer review

A practical California working record - editable in Word

USE IT THIS WAY	DO NOT MISTAKE IT FOR THIS
Use on the written agreement and exhibits before accepting, renewing, or changing network participation.	This does not interpret a contract, recommend participation, or estimate reimbursement from a payer name.

Working record

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

Six review points

1	**[ ] Identify every governing document** List agreement, fee schedule, manuals, policies, portals, amendments, and incorporation-by-reference clauses. **Your record:** _____ **Source:** CMS: provider enrollment
2	**[ ] Extract payment terms** Record service-specific amounts, modifiers, place-of-service rules, timely filing, adjustments, recoupment, and payment timing. **Your record:** _____ **Source:** IRS: recordkeeping for individuals
3	**[ ] Map administrative duties** Capture credentialing, authorization, documentation, audits, claims, appeals, directories, and response deadlines. **Your record:** _____ **Source:** CMS: provider enrollment
4	**[ ] Review clinical and access terms** Identify utilization, availability, referral, continuity, emergency, and communication obligations. **Your record:** _____ **Source:** CMS: provider enrollment

5	**[ ] Review data and vendor terms** Map portals, disclosures, security, business-associate language, subcontractors, and incident duties. **Your record:** _____ **Source:** HHS: business associates

6	**[ ] Record exit and dispute routes** Extract term, renewal, amendment, termination, continuity, recoupment, arbitration, and governing-law language for review. **Your record:** _____ **Source:** CMS: provider enrollment

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- CMS: provider enrollment
- IRS: recordkeeping for individuals
- HHS: business associates

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.