Superbill setup audit

A practical California working record - editable in Word

USE IT THIS WAY	DO NOT MISTAKE IT FOR THIS
Use before issuing superbills and whenever provider, location, coding, payment, or document systems change.	This is not a claim form, coding opinion, reimbursement promise, or client-specific benefits determination.

Working record

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

Six review points

1

[ ] Identify the rendering provider

Verify name, credential, license, NPI, tax identifier, and service location against source records.

Your record: _____

Source: CMS: provider enrollment

2

[ ] Define the service fields

Record which dates, procedure codes, diagnosis fields, units, fees, and payments the workflow will populate.

Your record: _____

Source: CMS: provider enrollment

3

[ ] Separate charge from payment

Ensure the document distinguishes billed amount, amount paid, balance, and any adjustments.

Your record: _____

Source: IRS: recordkeeping for individuals

4

[ ] Validate coding responsibility

Document who selects codes, what record supports them, and how corrections are handled.

Your record: _____

Source: CMS: provider enrollment

5

[ ] Test a fictional example

Generate a sample with no real person and check labels, alignment, totals, and legibility.

Your record: _____

Source: HHS: Privacy Rule guidance

6	**[ ] Set correction and delivery controls** Record secure delivery, versioning, reissue, and preservation of what was supplied. **Your record:** _____ **Source:** HHS: Security Rule guidance

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- CMS: provider enrollment
- IRS: recordkeeping for individuals
- HHS: Privacy Rule guidance
- HHS: Security 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.