



# Patient A/R Health Checklist

*A quick self-assessment for billing teams. Use this checklist monthly to determine if your practice has a healthy patient A/R collection system:*

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Patient A/R is under 35% of total A/R

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90+ day patient A/R is under 10% of total A/R

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Patient-specific DSO is reviewed monthly and maintained below 45 days

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Insurance benefits are verified before treatment

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Statements are sent on a consistent schedule

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All patients can pay digitally (portal, text, QR, or link)

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Automated reminder workflows are active for eligible balances

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Payment plans are standardized, not improvised

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Patient contact data is updated at every visit

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Small write-offs risks (<\$200) are tracked and addressed with focused effort

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Front desk is specifically trained on financial conversations