

## Readiness Checklist

The purpose of this checklist is to provide the behavioral health agency (BHA) with a final review of milestones that need to be completed to ensure a smooth and successful transition to the managed care organization (MCO) billing environment. Below is an example of a timeline for completion of the milestones during the transition year to help guide completion of the checklist.

	Transition Year													JAN
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC		
1. Prepare information systems for new environment	█													Begin MCO Reporting
2. Prepare for encounter submission to MCOs					█									
3. Implement organizational and admin changes to support encounter processing							█							
4. Prepare for terminating BHO reporting							█							

### Preparing information systems for the new environment

EHR upgrades and/or replacement is complete (date):

Billing system upgrades and/or replacement is complete (or, contract with clearinghouse is in place) (date):

System is configured to meet third-party liability (TPL) standards (date):

### Preparing for encounter submission to the MCOs

Successful testing of encounter data submission with all MCOs (at least two rounds) has occurred (date):

Coordination of benefits (COB) procedures are in place for TPL billing(date):

All active client records are updated with appropriate insurance information(date):

## Implementing organizational and administrative changes to support encounter processing

Billing procedures to support MCO billing are complete (date):

Control processes are in place to ensure that all services are reported and accepted by the MCO  
(date):

Staff training in billing operations procedures is complete (date):

## Preparing for terminating reporting with the BHO

Final submission of service and native data to the BHO is complete (date):

Procedures to access to historical data are in place (date):



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