RCM PARTNER EVALUATION CHECKLIST

5 criteria for choosing the right revenue cycle partner

An end-to-end revenue cycle partnership is a high-stakes, long-term operational commitment with real financial consequences. A thorough evaluation isn't optional — it's the difference between a partnership that delivers and one that disappoints.

Use this checklist to pressure-test potential partners across the areas that matter most.

01

Make sure values + goals align.

A strong partnership requires shared priorities + cultural fit.

Look for a partner who aligns with your mission and is clear on what success looks like from day one. Look for well-defined plans for onboarding, staff integration and performance reporting. Carefully evaluate the people impact — understand exactly what happens to your associates, whether they stay put, transition to the partner or are displaced.

1	How do you ensure alignment with our organizational goals?
2	How do you handle cultural integration between organizations?
3	How do you measure success during and after implementation?
4	How do you prevent productivity loss during transition?

GREEN FLAG. The partner can articulate specific integration procedures, provides a named implementation lead and offers transparent performance reporting from day one.

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02

Verify their track record.

Don't rely on promises — confirm performance.

Talk directly with existing clients. Ask for measurable results, not just case studies. Look for experience with organizations similar to yours in size, complexity and region — and check for third-party recognition for RCM performance like KLAS rankings or HFMA awards.

1	Can you provide references from clients of similar size and complexity?
2	What measurable results have you delivered for them?
3	What experience do you have in our region?

GREEN FLAG. The partner provides direct access to reference clients, can cite specific financial outcomes and holds recognized industry awards or third-party validation.

03

Assess their tech infrastructure + approach to innovation.

Don't be dazzled by hype alone.

Look at how their RCM platform really works with your EHR and systems, how secure and real-time the data is and whether reporting gives you meaningful insight. When they talk about automation and AI, ask for concrete examples — what's working today and what results are being driven.

1	What technology capabilities do you have and how do they integrate with existing systems?
2	What data security measures are in place?
3	What types of automation and AI are live across your client base today and what are the specific use cases?

GREEN FLAG. The partner demonstrates live AI and automation use cases (not just roadmap), supports your EHR and provides integrated analytics — not siloed dashboards.

"We went through a pretty exhaustive process when deciding whether to insource, outsource or do a hybrid approach. We realized that even though we said we were insourced, we were actually working with several revenue cycle firms and managing vendor relationships. There were gaps, and things were getting missed. We had a lot of internal employees doing great work, but when it came to technical aspects and the nuance of collecting, things were too fragmented. **We needed one source of truth and one partner** to hold accountable..."

Health System CEO / President, KLAS Research Interview, July 2025

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04

Insist on shared decision-making.

Governance should be collaborative, not one-sided.

Set clear expectations for decision-making and communication upfront. Establish steering committees, escalation paths and regular check-ins to keep things transparent and accountable. Build shared forums so both teams can align on priorities and tackle challenges early.

1	Will a joint steering committee be established? When?
2	How will you involve our leadership in policy and process decisions?
3	What communication cadence do you recommend?

GREEN FLAG. The partner proposes a formal governance structure with daily, monthly and quarterly touchpoints and includes your leadership in strategic decisions, not just status updates.

05

Look for ongoing value.

Choose a partner who goes beyond daily operations.

The best partners bring strategic insights and proactive assistance beyond traditional revenue cycle operations. That means proactive guidance on payer policy changes, denial prevention and issue resolution that goes beyond contracted scope.

1	How do you plan to keep us informed about payer policy changes?
2	Will you provide recommendations to reduce denials and audits?
3	How do you identify and resolve issues outside of contracted scope?

GREEN FLAG. The partner offers payer strategy support, proactive denial prevention guidance and out-of-scope issue resolution as standard — not as an upsell.

What's next?

Get the complete picture.

This checklist is your starting point. Go deeper in Making the Grade: How to Find the Right End-to-End Revenue Cycle Partner — covering the case for E2E RCM, onboarding best practices and third-party research benchmarks.

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