



RCM GOALS & KPI ASSESSMENT

Consulting discovery / Current performance / Measurable outcomes

01 CLIENT & PROJECT DETAILS

Organization / DBA _____	Primary contact / role _____
Specialty / service lines _____	Measurement period (dates) _____

02 PRIORITIES & CONSULTING GOALS

Select the areas to evaluate during the discovery engagement.

REVENUE INTEGRITY

☐ Coding accuracy ☐ Charge capture ☐ Reimbursement

DENIAL PERFORMANCE

☐ Initial denials ☐ Appeals ☐ Root causes

CASH & COLLECTIONS

☐ A/R aging ☐ Collections ☐ Underpayments

WORKFLOW & COMPLIANCE

☐ Front-end edits ☐ CDI ☐ Training / controls

03 BASELINE KPI SCORECARD

Enter the current result, target, and source. Definitions and periods must be agreed upon.

KPI / definition	Current	Target	Data source / period
Net collection rate	_____	_____	_____
Gross collection rate	_____	_____	_____
Days in A/R	_____	_____	_____
A/R > 90 days (%)	_____	_____	_____
Initial denial rate (%)	_____	_____	_____
Clean claim rate (%)	_____	_____	_____
Charge lag (days)	_____	_____	_____
Coding audit accuracy (%)	_____	_____	_____
Denial overturn rate (%)	_____	_____	_____
Cost to collect (%)	_____	_____	_____

04 SUCCESS CRITERIA & OWNERSHIP

Top 2-3 desired outcomes _____	Executive sponsor / KPI owner _____
Review cadence / reporting tool _____	Target completion / decision date _____

Measurement note: KPIs are diagnostic and planning tools. Targets are negotiated after data validation; results are not guaranteed.

Client contact signature: _____ Date: _____