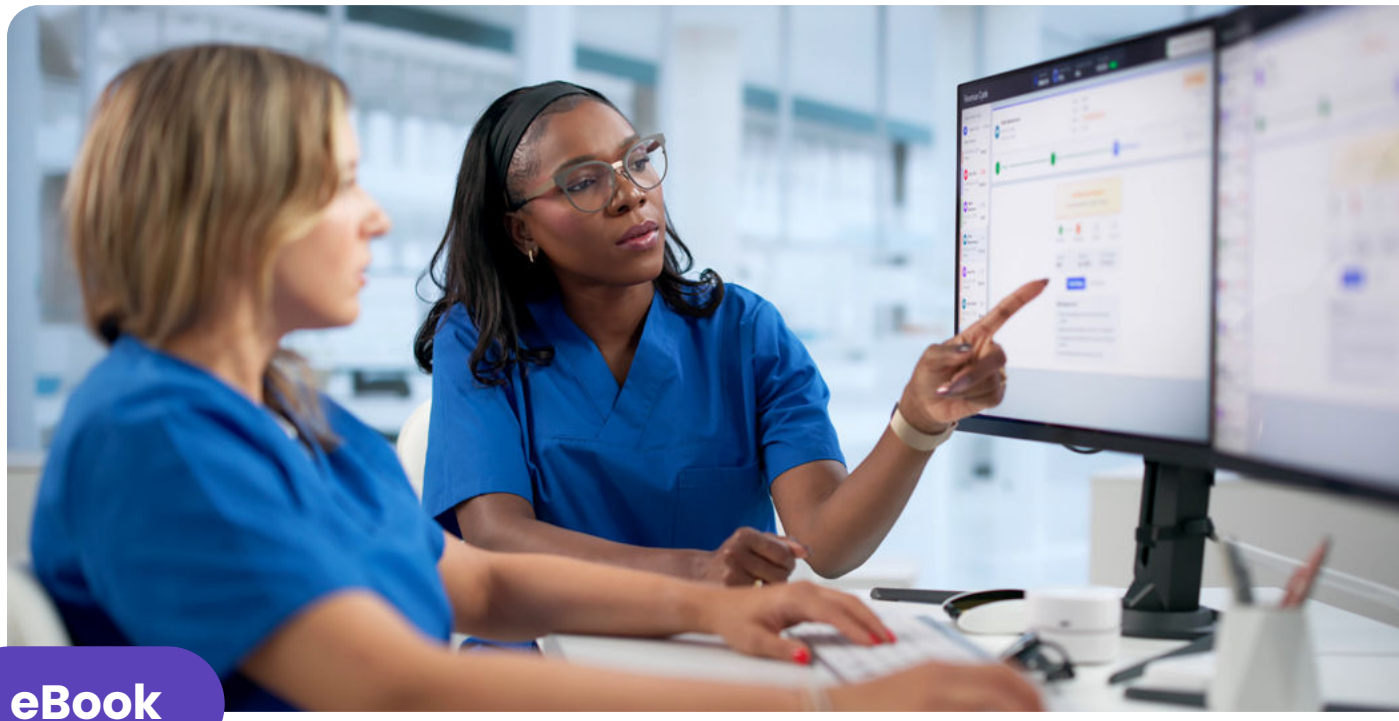
EZclaim®
Medical Billing Software



eBook

# Medical Billing RFP Checklist: What to Ask Before Switching Software in 2027

A Practical Guide to Evaluating Medical Billing Software Vendors, Comparing Capabilities, and Making a Confident Purchasing Decision

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# Introduction: Making an Informed Medical Billing Software Decision

Switching medical billing software is an opportunity to improve workflows, support operational visibility, and strengthen growth potential. However, choosing the right platform requires careful consideration. You can approach this decision with clear priorities by using a medical billing request for proposal (RFP).

A medical billing RFP is a formal document that outlines your organization's billing software requirements and asks vendors to provide information about their capabilities, pricing, implementation process, and support services.

This guide provides a practical framework for building a medical billing RFP and evaluating software vendors in 2027. You'll learn which capabilities to prioritize, what questions to ask, and how to assess each vendor's ability to support your workflows. You'll also gain a structured approach to preparing for implementation so you can select a solution that meets your needs today and supports your future goals.



# Chapter 1: Assess Your Current Medical Billing Challenges

Before developing your medical billing RFP, evaluate how your current software supports your daily operations and where improvements could make the greatest impact. With a clear understanding of your existing workflows, you can identify exactly what you need your next platform to deliver.

## Identify Inefficiencies in Your Existing Billing Processes

Review your daily billing activities to identify workflows that create delays, increase administrative work, or limit financial visibility. Document these challenges so you can connect each one to a specific software requirement.

- [ ] Review manual workflows, claim-processing delays, payment posting, and reporting limitations
- [ ] Identify disconnected systems and repetitive administrative tasks
- [ ] Document operational challenges that you want the new software to address

## Identify Stakeholders and Their Software Requirements

Involve the people who manage and use your billing software to ensure your RFP reflects their priorities. Consider how requirements differ based on your organization's structure and responsibilities.

- [ ] Identify decision-makers and employees involved in billing operations
- [ ] Gather requirements from administrators, billing managers, providers, and other relevant users
- [ ] Account for differences between healthcare practices and medical billing companies

## Establish Measurable Selection Goals

Define what success looks like before comparing vendors. Use your current performance as a baseline to establish achievable targets and distinguish essential capabilities from optional features.

- [ ] Define the operational improvements your organization wants to achieve
- [ ] Establish measurable goals for efficiency, reporting, and billing visibility
- [ ] Prioritize essential requirements over optional features

# Chapter 2: Define Your Medical Billing Software Requirements

Clear, targeted questions help you understand how each platform works, identify potential costs, and compare vendors based on the capabilities that matter most to your organization. Use the checklist below to build out your requirements and ask the right questions.

## Electronic Claims Submission and Tracking

Your claims management tools should help your team submit accurate claims and resolve processing issues efficiently. Ask vendors to demonstrate how their software supports each stage of the submission process.

- [ ] Does the software support electronic claim creation, submission, and status tracking?
- [ ] How does the software identify rejected claims and support corrections and resubmissions?
- [ ] Do clearinghouse services require additional fees?

## Eligibility Verification and Denial Management

Eligibility verification and denial management capabilities can help your team address coverage issues and reduce preventable billing delays. Evaluate how each platform identifies problems and supports timely resolution.

- [ ] Does the software have real-time insurance eligibility verification capabilities?
- [ ] How are rejected and denied claims identified, tracked, and managed?
- [ ] What tools support follow-up and reporting on recurring claim issues?

## Payment Posting and Accounts Receivable Management

Accurate payment records and accessible A/R information help your team prioritize collections and monitor outstanding balances. Determine how each platform handles remittance processing and supports follow-up activities.

- [ ] Does the software have electronic remittance processing and payment posting capabilities?
- [ ] How does the platform handle adjustments, partial payments, and outstanding balances?
- [ ] What do accounts receivable reporting and follow-up workflows look like?

## Reporting and Revenue Cycle Visibility

Effective reporting gives you the information needed to evaluate financial performance and make informed operational decisions. Look for tools that provide relevant insights without requiring extensive manual data preparation.

- [ ] Which financial and operational reports are available?
- [ ] What reporting customization, filtering, and data export capabilities does the software have?
- [ ] Does reporting support your specific billing workflows?

## Integrations and System Compatibility

Connected systems can reduce duplicate work and support more consistent information across your organization. Confirm whether each vendor can accommodate your existing technology and what is required to maintain those connections.

- [ ] Which EHR and practice management system integrations does the software support?
- [ ] What are the data exchange capabilities and technical requirements?
- [ ] What integration costs, limitations, and ongoing support can you expect?

## Patient Billing and Payment Collection

Accessible patient payment options can simplify collections and improve the billing experience. Evaluate how each solution helps patients manage payments while keeping account information accurate.

- [ ] Are there online patient payment options and billing access?
- [ ] How are payments recorded and reflected in account balances?
- [ ] What are the transaction fees, and are there additional costs for patient payment tools?

## Scalability, Security, and Access Controls

Your software should support organizational growth while maintaining appropriate safeguards for sensitive information. Assess how each vendor manages system capacity, user access, and ongoing platform reliability.

- [ ] How does the platform accommodate additional users, providers, and billing volume?
- [ ] What authentication, user permissions, and data protection measures does the platform have?
- [ ] How are software updates, maintenance, and system availability managed?

## How EZClaim Addresses Essential Billing Requirements

EZClaim offers connected solutions designed to help healthcare practices and medical billing companies manage essential revenue cycle activities with greater efficiency and visibility.

- ✓ Coordinate appointments alongside billing operations with **EZClaim Scheduling**
- ✓ Access relevant billing information online from the **EZClaim Portal**
- ✓ Manage payments and streamline billing-related tasks using **EZClaimPay**

Together, these features address common requirements related to workflow efficiency, financial visibility, and patient payments. As you compare vendors, consider how EZClaim's capabilities align with your highest-priority requirements and the operational improvements you want to achieve.

# Chapter 3: Evaluate Vendor Support, Pricing, and Implementation

The value of medical billing software extends beyond its features. Pricing structures, customer support, implementation services, and contract terms all influence your experience with a new platform. Use your RFP to evaluate these factors so you can build a realistic budget, select the best vendor for your organization, and prepare for the transition.

## Understand the Total Cost of Ownership

Compare the full cost of adopting and maintaining each platform rather than relying on introductory pricing. A detailed cost estimate helps you understand how expenses may change as your organization grows.

- [ ] Evaluate initial setup fees and recurring subscription or licensing costs
- [ ] Identify transaction, clearinghouse, or integration fees that apply
- [ ] Know which training, technical support, and optional features are included in the quoted price
- [ ] Request a three-year cost estimate that accounts for anticipated organizational growth

## Evaluate Training and Customer Support

Your team's ability to use new software effectively depends on accessible training and reliable assistance. Assess the resources each vendor provides during onboarding and throughout your ongoing relationship.

- [ ] Ask which onboarding and training resources are available for new users
- [ ] Understand which support channels are offered and their operating hours
- [ ] Understand how urgent technical issues are prioritized and escalated
- [ ] Clarify which training and support services are included, and which require additional fees

## Review Implementation Responsibilities and Timelines

A structured implementation plan helps you prepare for a software transition while maintaining essential billing activities. Clarify each vendor's approach to migration, testing, and launch preparation before establishing your timeline.

- [ ] Request an implementation plan with phases, milestones, and estimated timelines
- [ ] Clarify vendor responsibilities
- [ ] Define internal team responsibilities
- [ ] Evaluate data migration, testing, training, and post-implementation support

## Confirm Contract Terms and Data Access

Review each vendor's agreement to understand your long-term commitments and maintain control over your billing information. Clear contract provisions help you plan for future operational changes.

- [ ] Review contract length, renewal terms, and cancellation requirements
- [ ] Understand provisions for price increases or changes to service commitments
- [ ] Clarify data ownership, accessibility, and export options
- [ ] Determine what assistance is available if your organization changes vendors

## EZClaim's Approach to Support and Accessibility

EZClaim is designed to help you manage revenue cycle activities without unnecessary complexity. Teams can navigate the system with ease and lean on our US-based customer support team for quick and helpful solutions.

- ✓ User-friendly interface that makes essential billing workflows easier to navigate
- ✓ US-based support from representatives who understand your workflows
- ✓ Only pay for features you need

As you evaluate EZClaim alongside other vendors, request pricing based on your organization's size and required capabilities. Confirm available onboarding services, training options, and ongoing support arrangements to understand how the solution fits your operational needs and budget.

# Chapter 4: Compare Medical Billing Software Vendors

A consistent evaluation process helps you compare medical billing software vendors based on how well they meet your organization's requirements. Rather than focusing on individual features or pricing alone, use the checklist below as a structured scoring framework for assessing each solution's capabilities, overall value, and alignment with your operational goals.

## Establish Weighted Evaluation Criteria

Not every software requirement carries the same importance. Weigh your evaluation categories based on their impact on daily operations and your organization's long-term priorities.

- [ ] Assign relative importance to billing functionality, reporting, integrations, implementation, pricing, support, and security
- [ ] Adjust category weights based on organizational priorities
- [ ] Identify mandatory requirements that vendors must meet

## Use a Consistent Vendor Scoring System

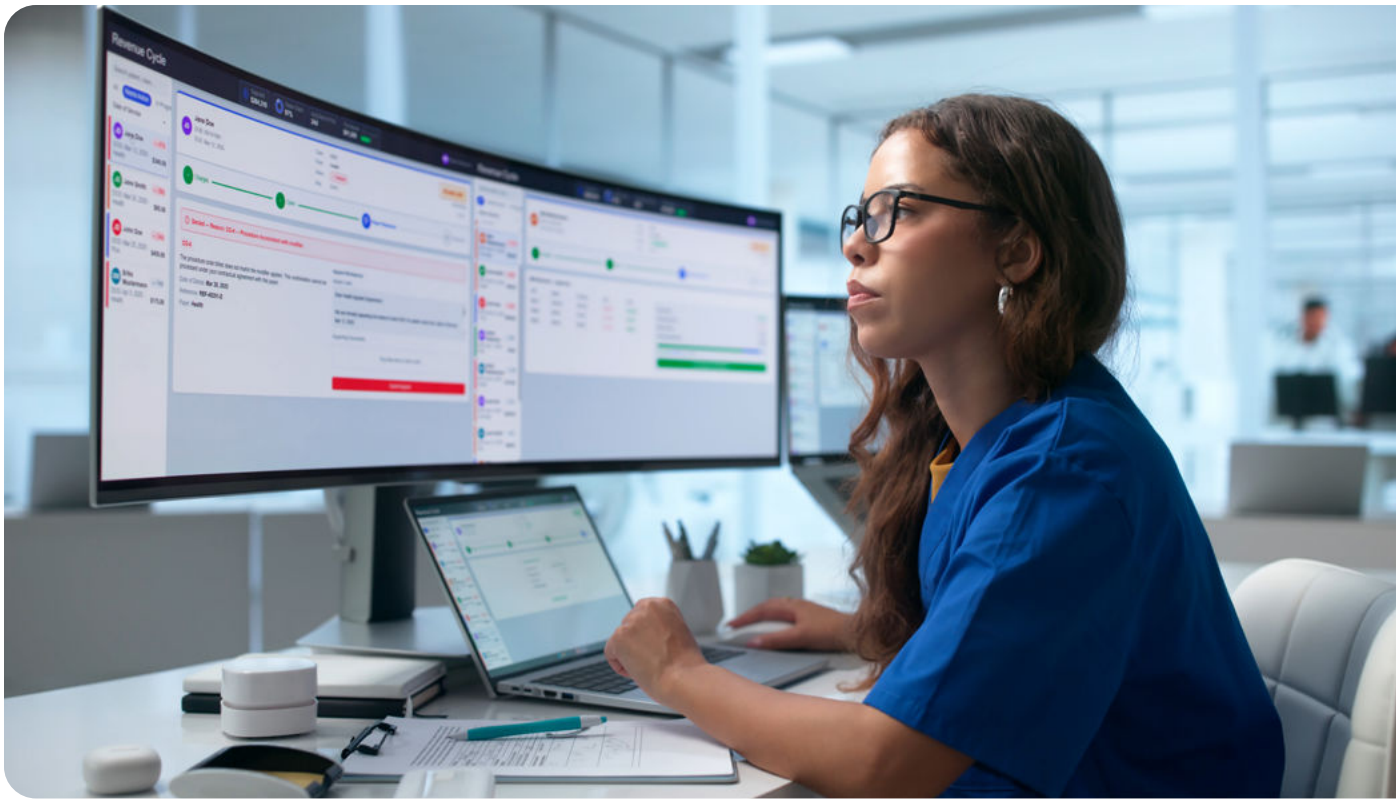
A standardized rating scale helps you evaluate vendor responses objectively. Score each vendor against the same requirements, then apply your category weights to calculate an overall rating.

- [ ] Rate each requirement from 1 (does not meet requirements) to 5 (fully meets requirements)
- [ ] Multiply each category's rating by its assigned weight to determine its contribution to the overall score.
- [ ] Review each vendor's performance across categories and identify the strongest overall fit

## Distinguish Demonstrated Capabilities From Promises

Vendor responses should clearly distinguish available functionality from planned enhancements. Request demonstrations and supporting documentation to confirm that a potential solution can deliver the capabilities your organization needs.

- [ ] Ask vendors to demonstrate essential features using workflows that reflect your daily billing operations
- [ ] Confirm whether specific capabilities require optional modules, third-party integrations, or custom development
- [ ] Request written explanations for incomplete responses, unsupported claims, or features planned for future releases



# Chapter 5: What to Ask Before Switching Software

Before selecting your next medical billing software provider, use this final checklist to confirm that your preferred vendor meets your operational requirements and long-term goals. These questions help you validate essential capabilities, clarify expectations, and make a confident purchasing decision.

## Questions About Software Functionality

A product demonstration is your opportunity to see how the platform supports your daily billing operations. Focus on the workflows your team uses most frequently and confirm exactly what the proposed solution includes.

- [ ] Can you demonstrate how our most important billing workflows operate within your platform?
- [ ] Which capabilities are included in the proposed package, and which require additional products or fees?
- [ ] Are there any limitations or workarounds we should anticipate?

## Questions About Implementation and Data Migration

A successful software transition requires clear responsibilities and a realistic implementation plan. Confirm how your vendor will support data migration and help your team maintain billing continuity throughout the process.

- [ ] What data can be transferred from our existing billing software?
- [ ] What is the expected implementation timeline, and what responsibilities will our team have?
- [ ] How will ongoing billing activities be managed during the transition?

## Questions About Pricing and Long-Term Support

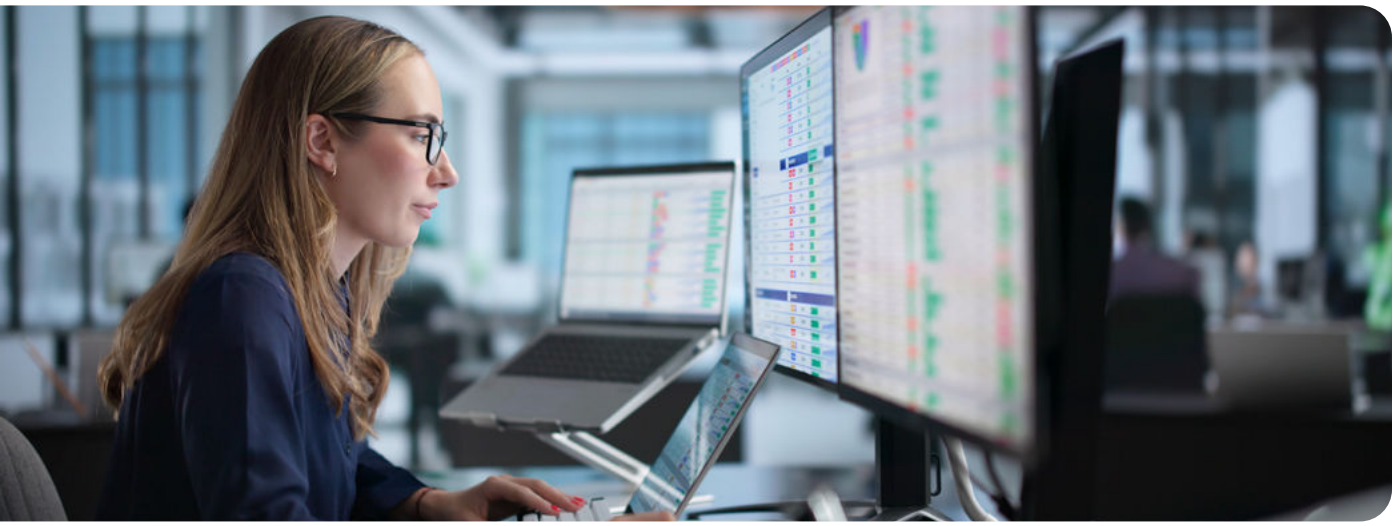
Your software investment should deliver lasting value as your organization evolves. Review the complete pricing structure and confirm which services will be available to your team after implementation.

- [ ] What is the total cost of the proposed solution, including implementation, integrations, and ongoing fees?
- [ ] What training and customer support are included after implementation?
- [ ] How will pricing and functionality change as our organization grows?

## Questions to Confirm Requirements Before Signing the Agreement

Your final review should verify that the vendor's commitments align with your RFP requirements. Confirm that essential capabilities and contractual obligations are documented before moving forward.

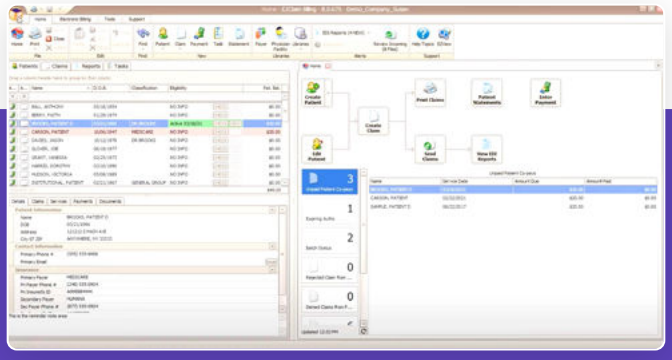
- [ ] Have all mandatory software requirements been demonstrated and confirmed?
- [ ] Are implementation responsibilities, service commitments, and contract terms documented?
- [ ] What options are available for accessing or exporting our data if we switch vendors in the future?



# Make The Switch to EZClaim

A strong medical billing RFP gives you the clarity to ask better questions, compare vendors with confidence, and choose a solution that delivers real value. With the right requirements in place, you're ready to make a smarter investment in your organization's future.

EZClaim helps you turn those priorities into results. With user-friendly solutions for claims management, payment posting, reporting, scheduling, and patient payments, you can spend less time navigating complex workflows and more time driving your revenue cycle forward.



**Put your RFP to the test. Schedule a consultation to see how EZClaim measures up to your requirements.**

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