



AUDIT WORKSHEET

Where might you find lost treasures through the revenue cycle? Use this audit to guide you through the process to find hidden profits.

1. Did the optometrist document all professional services performed in the patient encounter record?
2. Did those services all get transferred to the patient ledger properly?
3. What was billed out to the patient for glasses or contacts?
4. Does that match what was actually ordered? (Check for remakes!)
5. Did the optical lab or vendor charge you properly for the products ordered?
6. If there is insurance involved, did you get paid properly by them?
7. Did the patient pay the proper balance at the time of order or dispense?