

# How To **Quit** Your Biller

A Comprehensive Guide to Leaving Your RCM Provider



**Switching Revenue Cycle Management (RCM) partners can feel daunting**—especially when you’ve relied on the same biller for years, or you’re locked into an auto-renewing contract. **But staying with the wrong billing partner can quietly cost your practice hundreds of thousands of dollars** in missed revenue, aging A/R, and unaddressed denials.

This playbook walks you through the step-by-step process of severing ties with your current RCM vendor, from contract review to data transition. Whether you're working with a third-party billing company or an in-house solution that's no longer serving you, we're here to help you navigate the process with confidence and clarity.

## Step 1: Know Your Contract

Before anything else, pull your billing contract and look for the following key items:

- Term length (typically 36 months)
- Auto-renewal clause (most renew automatically unless action is taken)
- Notice period (usually 90 days prior to the term end)
- Termination clauses (cause vs. convenience)
- Data ownership and transition language

Tip: If you're nearing the end of your term, start the process at least 120 days out to give yourself a buffer before the auto-renew window closes.

## Step 2: Audit Your Performance

You don't need a vendor switch to be emotional. Treat it like a business decision.

Pull your net collection & denial rate, & average days in A/R  
Compare your performance to national benchmarks

Assess communication and transparency:

- Do you get regular reporting?
- Do you understand how they're following up?
- Are you getting answers, or just spreadsheets?

Red Flags:

Net collections below 95%

Aging A/R (especially >90 days) growing over time

Generic or copy/paste denial codes without resolution steps

## Step 3: Get a Second Opinion

Before making a move, get input from a trusted source—preferably a firm that offers free billing diagnostics or performance audits.

At Global Vision, we offer a no-pressure RCM audit that reveals:

How much you should be collecting  
Where money is slipping through the cracks  
Whether your denial and appeal processes are truly working

This gives you the clarity you need to move forward (or confirm that your biller is doing great!).

**Let's Get Started**



800-582-2345



www.globalv.com



sales@globalv.com



# How To **Quit** Your Biller

A Comprehensive Guide to Leaving Your RCM Provider



On page one, we went through steps to understand the terms of your current RCM contract as well as understanding whether or not a change may be needed, and how to get advice on where you stand compared to national averages. Next, we will walk through the steps you must take to transition from your current billing partner to a new solution. The most important thing to keep in mind - You don't have to go through this process alone. We are here to help and to assist with advanced planning.

## Step 4: Prepare Your Exit Plan

If you decide to move on, you'll need a transition plan in writing. We recommend:

- Preparing a termination notice draft (don't send it yet)
- Listing all the systems your current vendor touches (EMR, clearinghouse, patient portal)
- Identifying all data and logins you'll need access to (payer portals, reports, prior auths, etc.)
- Outlining a transition timeline, ideally with a 30-60 day parallel runway with your new partner

Note: If your current vendor is uncooperative, you'll want a partner who can help manage a hostile off-boarding while protecting your cash flow.

## Step 5: Give Grace—But Be Firm

Once you're ready:

1. Send your termination letter per the contract instructions (generally email + certified mail)
2. Include the date of final claims submission
3. Request a cutoff plan: when they'll stop billing, how they'll wind down A/R, and how data will be delivered
4. Avoid emotional language—keep it professional and focused on business goals

Pro tip: Offer to let them finish claims for dates of service through a set date to ensure a clean handoff. This avoids confusion or overlapping submissions.

## Step 6: Secure Your Data

This is critical. Before the relationship ends:

- Request a full A/R aging report (with CPTs, payer names, and balance details)
- Pull denial reports, open claims, and recent EOBs
- Ensure payer credentials (portals, clearinghouse access) are transferred or updated
- If you're using their instance of software (like Kareo or AdvancedMD), confirm your data export and ownership rights

Checklist Provided: We include a full "What to Download Before You Go" checklist as part of every Global Vision onboarding.

## Step 7: Start Fresh—with Support

A good RCM partner should:

- Start with eligibility checks and clean claims from Day 1
- Offer weekly onboarding calls and transparent reporting
- Work with your internal team to ensure continuity
- Offer transition support during your current vendor's wind-down phase

At Global Vision, we're proud to operate 100% onshore, with a U.S.-based team that values accuracy, integrity, and seamless communication. We'll walk alongside you through every phase of the transition—without disruption to your patients or staff.

## Closing Thoughts: Don't Stay Stuck Out of Loyalty or Fear

Most practices wait too long to make a move—and it costs them. If you feel like you're not getting the value you're paying for, you're not alone, and you're not trapped. With the right partner, leaving your biller doesn't have to be messy.

We've helped dozens of practices make this exact leap—and we'd be honored to help you too.

[Schedule a no-pressure consultation](#)



[www.globalv.com](http://www.globalv.com)



800-582-2345



[sales@globalv.com](mailto:sales@globalv.com)