

Smart PBA Solutions

Sample Portfolio Project

Standard Operating Procedure (SOP) Development & Process Improvement

Client: ABC Medical Billing Services

Industry: Healthcare Administration

Project Duration: 4 Weeks

Role: Business Analyst / Process Improvement Consultant

Business Challenge

The client experienced inconsistent medical claim processing due to undocumented procedures, resulting in processing delays, claim errors, and extended employee training.

Project Objectives

- Standardize claim processing
- Reduce errors and rework
- Develop clear SOP documentation
- Improve onboarding consistency
- Increase operational efficiency

Sample Standard Operating Procedure

Process: Medical Claim Submission

Section	Details
Purpose	Ensure all medical claims are processed accurately and consistently
Scope	Applies to all Billing Specialists
Systems	Athena, Outlook, Excel, SharePoint
Procedure	1. Receive claim 2. Verify demographics 3. Validate insurance 4. Review coding 5. Submit claim 6. Record confirmation 7. Update tracker
Quality Checks	Patient ID verified; Insurance active; Required documentation attached; Submission confirmed.
Exceptions	Escalate incomplete or rejected claims to the Billing Supervisor

Process Improvement Snapshot

As-Is Process

- Receive Claim → Manual Review → Individual Processing Methods → Submit Claim → Manual Tracking

To-Be Process

- Receive Claim → Standard SOP → Quality Checklist → Submit Claim → Centralized Tracking Dashboard

Key Recommendations

- Develop standardized SOP documentation
- Implement a quality checklist before submission
- Use a centralized tracking log or dashboard
- Standardize new employee training
- Review SOPs annually for continuous improvement

Expected Benefits

- 25% faster processing time
- 40% fewer documentation errors
- Reduced manager intervention
- Improved compliance and consistency

