

Free QA Checklist – Offshoring Healthcare Accounting Services

Nearshoring with Floowi for Marketing Agencies in the USA

Everything you need to evaluate vendors, align processes, and ensure success when delegating healthcare accounting tasks offshore.



Introduction & How to Use This Checklist

What This Is:

This QA (Quality Assurance) Checklist helps agencies, especially those working with healthcare clients, evaluate offshore accounting vendors and prepare for a seamless collaboration.

Why Does It Matter?:

Choosing the right offshore partner is critical when dealing with sensitive healthcare data, financial accuracy, and HIPAA compliance.

How to Use?:

Use this checklist during discovery calls, vendor evaluations, onboarding, and internal planning. Tick off each item to ensure you're covering every key factor for successful outsourcing.

Vendor Evaluation Checklist

Vendors Must Have the Following Characteristics When Searching for Them:

- ✓ Vendor is experienced in healthcare-specific accounting
- ✓ Has working knowledge of HIPAA and medical billing systems
- ✓ Demonstrates experience with U.S.-based clients
- ✓ Provides case studies or client references
- ✓ Offers clear onboarding timelines (e.g., under 15 business days)
- ✓ Offers English-fluent professionals
- ✓ Located in nearshore regions (LATAM preferred for timezone alignment)
- ✓ Shares transparent pricing (no hidden fees)
- ✓ Provides contract flexibility (pause, cancel, scale)
- ✓ Signs NDAs and complies with security standards



Process & Systems Compatibility

The Following Tools Can Be Used With QA Outsourcing

✓ With your existing tools:

- QuickBooks / Xero / FreshBooks
- Kareo, Athena, Medisoft (if applicable)
- Google Workspace / Office365
- Slack, Asana, Trello, etc.

- ✓ Provides secure access setup (VPN, permission-based)
- ✓ Has a system for version control and document backups
- ✓ Offers weekly or bi-weekly progress reporting
- ✓ Uses timesheets or activity logs to track work hours
- ✓ Familiar with your agency workflows (campaign cycles, reporting timelines)

Communication & Collaboration

From Day One, a Good QA Provider:

- ✓ Offers daily or weekly check-ins
- ✓ Works within U.S. time zones (overlap guaranteed)
- ✓ Clear escalation paths for delays, issues, or sensitive data errors
- ✓ Agrees on project management or communication tools (Slack, Zoom, etc.)
- ✓ Includes a dedicated point of contact or account manager
- ✓ Adjusts communication style to your agency's preferences
- ✓ Proactively recommends improvements based on experience



Performance & Quality Assurance

A Competent Provider:

- ✓ Sets clear KPIs from day one
(e.g., error rate <1%, close time <5 days, etc.)
- ✓ Provides monthly or quarterly performance reviews
- ✓ Tracks and reports metrics consistently
- ✓ Offers training or transition support when scaling
- ✓ Responds quickly to errors or compliance risks
- ✓ Updates you on industry or tax regulation changes (if applicable)
- ✓ Provides feedback loop for continuous improvement

✓ Final Tip: Keep This Checklist Handy

Use this guide when evaluating a new vendor or reviewing your offshore setup.

When offshoring is done right, it brings unmatched scalability, accuracy, and savings.

