

AR Follow-Up Workflow Infographic

A beginner workflow for moving unpaid accounts from unclear status to documented next action.

TYPE Infographic

WHO AR Follow-Up Specialists, Medical Billers, Medical VAs, and RCM beginners.

WHEN Use when learning how to work unpaid claims by status, payer, aging, and next action.

HOW Follow the workflow: find status, verify proof, choose action, document, and set follow-up.

Workflow stage: Back-End RCM - AR follow-up and unresolved claim resolution

1. Pick account

Prioritize by aging, payer, balance, deadline, queue, and client instructions.

2. Check status

Review PM system, clearinghouse, payer portal, remit, notes, and claim history.

3. Identify issue

Pending, not on file, rejected, denied, paid/underpaid, records needed, COB, auth, or patient balance.

4. Choose route

Follow up, correct/rebill, appeal, submit records, bill secondary, hold, or escalate.

5. Document proof

Source, date, status, reference, action, next owner, and follow-up date.

6. Track resolution

No account should be left with unclear status or no next action.

COMMON MISTAKE AVOIDED

Avoid writing vague notes like followed up with payer without status, reason, proof, or next action.

NO-PHI REMINDER

Do not use or enter real patient names, dates of birth, insurance IDs, member IDs, claim numbers, medical record numbers, addresses, phone numbers, diagnoses, treatment details, login details, or protected health information. Use fictional data only when practicing.

EDUCATIONAL DISCLAIMER

This resource is for beginner-friendly healthcare admin education only. It is not medical advice, legal advice, coding certification, payer-specific billing authority, a replacement for employer training, or a guarantee of employment. Always verify current requirements with official sources, employer policy, payer rules, client instructions, and updated guidance.

SOURCE / REVIEW NOTE

This beginner resource explains general claim and billing workflow concepts. Requirements can vary by payer, plan, provider type, specialty, place of service, contract, and current policy. Last reviewed: July 2026.