

# Clean Claim Checklist Infographic

A claim-readiness visual showing the details beginners should review before submission.

**TYPE** Infographic

**WHO** Medical Billers, claim support VAs, AR learners, and RCM beginners.

**WHEN** Use before claim submission study, scrubber review, rejection prevention, or denial-prevention practice.

**HOW** Review each card as a claim protection checkpoint. Use fictional data only.

## Workflow stage: Middle RCM - claim submission and claim scrubber readiness

### Patient data

Demographics and insurance details should match approved source documents.

### Payer/plan

Correct payer, plan, member details, COB clues, and date of service readiness.

### Provider/location

Rendering/billing provider, NPI, place of service, and location must make sense.

### Codes

Diagnosis/procedure/supply details should be supported and reviewed by proper role.

### Auth/referral

Required authorization/referral details should be present and match service details.

### Timely filing

Submission and correction deadlines vary by payer and must be tracked.

### Claim edits

Fix rejections/edits before payer review when allowed.

### Documentation

Every next action should be documented with status, source, proof, and follow-up.

### COMMON MISTAKE AVOIDED

Avoid thinking a clean claim starts at submission; many errors begin earlier in the workflow.

### 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.