

Documentation Note Examples

Healthcare VA Learning Hub | Learn US Healthcare Admin One Workflow at a Time.

Resource type	Practice Sheet
Who it is for	Medical Billers, AR Follow-Up Specialists, denial learners, and healthcare admin beginners.
When to use it	Use when practicing clean, professional, non-PHI RCM documentation notes.
How to use it	Read the formula, study the fictional notes, then rewrite the vague note using safe practice language.
Last reviewed	July 2026

Core learning rule: Where does this happen? Why does it matter? What happens if it is wrong?

A good RCM note protects continuity. It should help the next worker know current status and next action without guessing.

Fictional scenario

You are practicing how to write clean RCM notes without real PHI. Each note should show source, status, reason, action, proof/reference if available, next owner, and next follow-up.

Good note formula

Part	What to include
Date/time	When the action was completed.
Source	Payer portal, clearinghouse, PM system, EOB/ERA, phone call, or client queue.
Status	Pending, rejected, denied, paid, underpaid, not on file, records needed, etc.
Reason/findings	What the source said and why it matters.
Action	What you did or routed.
Proof/reference	Reference number, report name, batch ID, or other approved proof.
Next action	Owner and follow-up date.

Practice note examples - fictional only

Scenario	Safe note example
Rejected claim	FIC note: 07/05/2026 10:30 AM. Reviewed clearinghouse report. Claim rejected for missing subscriber relationship. Corrected field per practice worksheet and routed for resubmission review. Next follow-up: verify acceptance in 2 business days.
Denied claim	FIC note: 07/05/2026 11:00 AM. Reviewed fictional EOB. Denied for authorization. Checked simulated auth tracker; no matching auth found for DOS/service. Routed to denial review queue for allowed next action.

Scenario	Safe note example
Paid with balance	FIC note: 07/05/2026 12:15 PM. Reviewed fictional ERA. Payer paid and assigned \$40.00 coinsurance. Posting appears complete in worksheet. Next action: patient responsibility review per policy.

Learner task

- Rewrite one vague note into a complete note.
- Remove any real identifiers.
- Add source, status, action, proof, and follow-up date.
- Check that the note does not make promises or blame the patient/payer.

Vague note to fix

Called payer. Claim denied. Will follow up.

Review guide

A stronger fictional note should say which payer/source was checked, exact fictional denial reason, what proof was reviewed, what action is allowed next, who owns it, and when it will be followed up.

Common beginner mistakes

- Writing notes that only say called payer or claim denied.
- Including real PHI in practice notes.
- Leaving no next action or follow-up date.
- Documenting opinions instead of source-based findings.

Safe practice reminder

Practice with fictional examples only. Do not copy real work queues, payer portals, clinic notes, employer SOPs, screenshots, patient accounts, or client information into any practice file.

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.

Recommended next step

Next, use the Claim Follow-Up Notes Template or Eligibility Verification Note Template to practice one fictional account note.