

Medical VA Skills Checklist

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

Resource type	Checklist
Who it is for	Aspiring Medical VAs, general healthcare admin learners, and beginners deciding whether to focus on scheduling, eligibility, authorization, billing, AR, or records.
When to use it	Use before preparing a resume, portfolio, interview answer, role path, or direct-client service offer.
How to use it	Check the skills you can demonstrate. For weak areas, write one practice task in the 30-Day Study Plan Tracker.
Last reviewed	July 2026

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

Purpose

Use this checklist to evaluate beginner readiness for Medical VA, healthcare admin, RCM support, scheduling, eligibility, authorization, AR, or general clinic support roles.

Skills checklist

- Admin basics: email, calendar, file naming, spreadsheets, task tracking, and professional written updates.
- Communication: clear, calm, respectful messages with appropriate routing and no medical advice.
- Privacy: understands PHI, approved systems, minimum necessary, and fictional-data practice only.
- Workflow map: understands patient, provider, payer, claim, and RCM.
- Scheduling/intake awareness: knows how appointment type, provider, location, and demographics can affect workflow.
- Eligibility/benefits awareness: knows plan, effective date, network, benefits, COB, referral, and auth checks matter.
- Prior authorization awareness: knows approval details must match service, dates, units, provider, and location.
- Billing awareness: understands charge entry, claim submission, EOB/ERA, payment posting, denials, AR, and patient billing basics.
- Documentation discipline: can write task completed, source checked, result, reference, and next action.
- Escalation habit: knows when to stop and ask instead of guessing.
- Portfolio proof: can build mock samples using fictional information only.
- Truthful career positioning: does not claim certification, clinical authority, or real experience not actually earned.

Skill readiness scorecard

Area	Score /5	Action if low
Workflow basics	__ / 5	Review patient-provider-payer and medical billing workflow visuals.
Privacy discipline	__ / 5	Review the No-PHI reminder and practice with fictional data only.
Documentation	__ / 5	Practice notes that include action, result, source, and next step.
Front-end RCM	__ / 5	Study scheduling, registration, eligibility, referral, and authorization basics.
Back-end awareness	__ / 5	Study payment posting, denials, AR, and patient responsibility basics.
Career proof	__ / 5	Build one small fictional sample before applying widely.

Common beginner mistakes

- Claiming to know everything instead of choosing one starter role path.
- Ignoring privacy because the task feels administrative.
- Showing fake or copied experience instead of truthful proof.
- Forgetting documentation and next-action habits.
- Confusing Medical VA support with clinical decision-making.

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 resource is for educational and business-planning use only. It does not guarantee employment, client acquisition, income, or contract approval. Keep all claims truthful and verify privacy, business, email, and client-contract requirements before use.

Recommended next step

Next: choose one role path and create one fictional proof sample connected to that path.