

Payment Posting Basics Infographic

A beginner workflow for recording payer payments, adjustments, denials, and patient responsibility safely.

TYPE Infographic

WHO Payment posting learners, Medical Billers, AR trainees, and RCM beginners.

WHEN Use when learning what happens after payer adjudication and before patient billing or AR follow-up.

HOW Follow each step and remember that posting rules depend on payer processing, system setup, and client policy.

Workflow stage: Back-End RCM - payment posting and reconciliation

Receive remit

ERA/EOB shows payer decision, paid amount, adjustments, denials, and patient responsibility.

Match account

Confirm payer, claim, DOS, provider, patient/account, and payment details match.

Post payment

Record payment and allowed adjustment according to SOP/system permissions.

Post denial

Route denial or remark codes for review and next action.

Patient responsibility

Post only according to payer processing, plan policy, and current client workflow.

Reconcile

Balance batch, detect mismatches, and document exceptions.

Route issues

Underpayment, overpayment, mismatch, or unclear remit may require escalation.

COMMON MISTAKE AVOIDED

Avoid assuming a balance is patient responsibility without payer processing support and current policy.

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.