

How to write clinical notes that get you paid

Your clinical notes should tell the whole story. Anyone who picks up the claim should know exactly what happened and why.

Every note should answer 4 questions:

WHO & WHEN?

Date, rep's name, your initials

WHAT'S THE PROOF?

Claim #, NEA ID, call ref #

WHAT DID YOU DO?

What you sent, and why

WHAT'S NEXT?

Turnaround and your follow-up date

PRO TIP:

Stuck on the same answer? Ask for a supervisor.

[TEMPLATE]

Date: _____

Claim Status: _____

Action Taken: _____

Rep Name: _____

Ref #: _____

Next Step: _____

Initials: _____

[EXAMPLE NOTE]

DATE:
6/28/26

CLAIM STATUS:
No claim on file. Clearinghouse shows accepted.

ACTION TAKEN:
Supervisor located claim and attachment (NEA4569774). Escalated to high priority.

REP NAME:
Ian, then Supv. Bill

REF #:
647589478

NEXT STEP:
Processing in 3 business days. Follow up 7/6.

INITIALS: LS

THE 14-DAY RULE:
No claim sits more than 14 days without a touch.