

Claim Status Search, Appeals and Inquiries Guide

Overview

The Claim Status Search function allows providers to efficiently track the status of submitted claims. This tool is designed to streamline follow-up processes and improve visibility into claim outcomes.

Claim Status Search from the Office Management Menu

1. From the navigation menu, click **Office Management > Claims**. Once selected, the *Claim Status Search* screen displays.

Figure 1: Office Management Menu

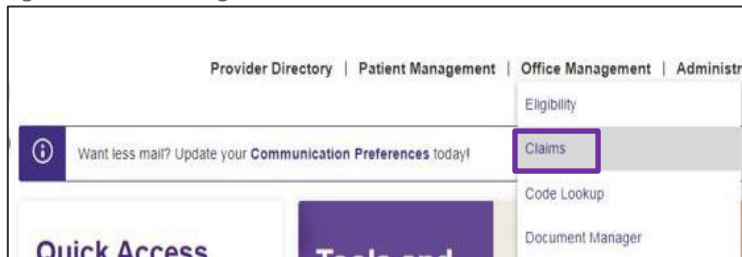


Figure 2: Claim Status Search Screen

Claim Status Search

Claim Number ?

Date of Service To

Processed Date To

Patient ? (Patient List) v

Last Name Member ID Patient Account Number
 (Last Name Example - Smith, John)
 (ID Example - HP5555555, HP4444444)
 (SSN Example - 555-55-5555, 444-44-4444)
 (Medicaid ID Example - AA55555, AA44444)
 (Medicare ID Example - 5555555, 4444444)

Provider ? xxx

Last Name Provider ID Provider Tax ID Provider NPI
 (Last Name Example - Smith, John)

Medical Group ?

Group Name Group ID Group Tax ID Group NPI
 (Last Name Example - Smith, John)

Bill Type ?

Status Paid Pended Denied Voided Rejected Forwarded Submitted

Search
Clear

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2. One field must be completed to conduct a claims search. Available search fields are:
 - a. Claim number - enter the Claim Number.
Note: If you enter a claim number, all other criteria will be overwritten.
 - b. Patient - select a radio button to search by **Last Name, Member ID or Patient Account Number**. Enter text or select from the Patient List dropdown menu.
 - c. Provider - select a radio button to search by **Last Name, Provider ID, Provider Tax ID or Provider NPI**. Enter text.

Note: If the user has access to fewer than 50 providers, a dropdown menu may be available.

3. After entering search criteria, click **Search**.
4. From the search results, click view to open the explanation of payment (EOP) or click the hyperlinked **Claim Number** to open the *Claim Status Detail* screen.

Figure 3: Claim Status Search Results Screen

View EOP	Claim Number	Status	Patient	Patient Account No.	DOS	Processed Date
View	20250903005842	Finalized	SMITH, JAMES		08/29/19	05/03/20

Note: Use the scroll bar at the bottom of the screen to scroll left to right for additional details.

5. From the *Claim Status Detail* screen, view full claim details and service line information.

Note: Click any hyperlinked item on the claim (For example: Line) to display more information about the item.

Figure 4: Claim Status Detail Screen

Line	Status	Check/EFT Number	Payment Date	Servicing Provider	DOS	Adjudicated Procedure	Procedure	Moc
0001	Finalized		04/26/22			T1015	T1015	

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Claim Status Search from the Patient Management Menu

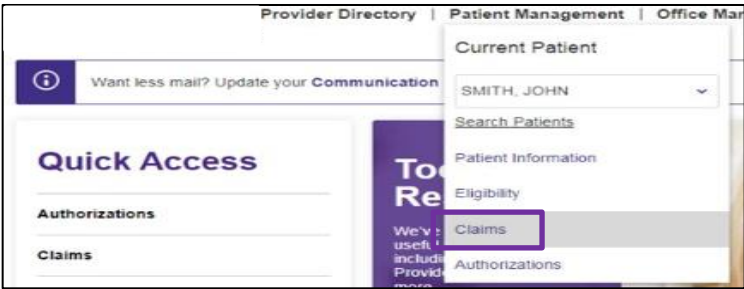
- 1. From the navigation menu, click **Patient Management**.

Figure 5: Patient Management Menu



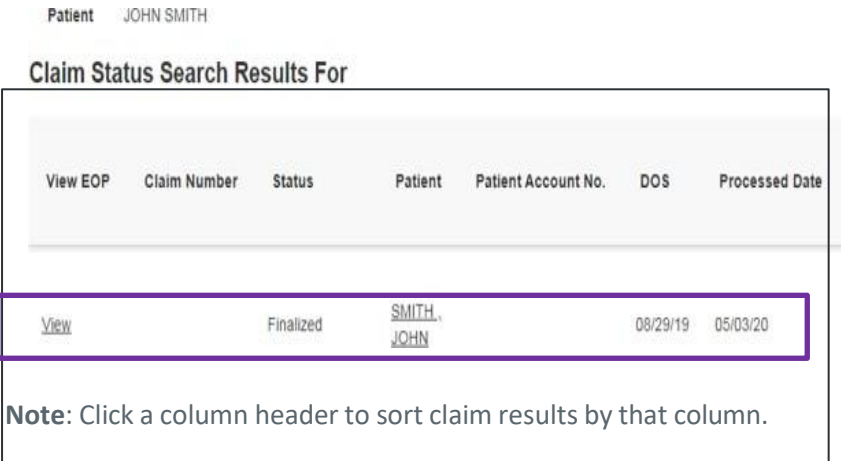
- 2. Select a patient from the **Current Patient** dropdown menu or click **Search Patients** to find a patient to review.

Figure 6: Patient Management Menu with a Selected Patient



- 3. Once a patient is selected, return to the **Patient Management** menu and click **claims** to view all claims for the selected patient.

Figure 7: Claim Status Search Results for Member Screen



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- From the search results, click view to open the explanation of payment (EOP) or click the hyperlinked **Claim Number** to open the *Claim Status Detail* screen.
- From the *Claim Status Detail* screen, view full claim details and service line information.
Note: Click any hyperlinked item on the claim (For example: Line) to display more information about the item.

Figure 8: Claim Status Detail Screen

Claim Status Detail for

[View Appeal](#)
Appeal Claim Print

Claim Level Information

Provider	Practice
Patient: JOHN SMITH	Patient Account No.
Bill Type: 131	
▶ Ref/Auth Number: None	Claim Receipt Date: 01/17/20
▶ Referring Provider	
▶ Diagnosis: R22.2 : LOCALIZED SWELLING MASS AND LUMP TRUNK	
Admit Date	Discharge Date: 08/26/19

Service Line Information

Line	Status	Check/EFT Number	Payment Date	Servicing Provider	DOS	Adjudicated Procedure	Procedure
0001	Finalized/Denial				08/26/19	0301	80048

View Explanation of Payment (EOP)

- Follow steps above to search for a claim.
- From the search results, click *view* under the View EOP column. A copy of the complete EOP will download for review.

Figure 9: Claim Status Search Results Screen

Claim Status Search Results						
View EOP	Claim Number	Status	Patient	Patient Account No.	DOS	Processed Date
View		Finalized	SMITH, JOHN		08/29/19	05/03/20

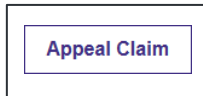
Note: EOP will obtain details for all claims processed under the check/draft number.

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Submitting a Claim Appeal or Inquiry

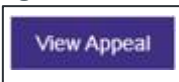
1. Once a claim is selected and the *Claim Status Detail* screen is displayed, there will be an option at the top left corner of the screen to appeal the decision of the selected claim. To begin an appeal or submit an inquiry, select the *Appeal Claim* button. This will open the *Appeal Details* screen.

Figure 10: Claim Status Detail Screen



Note: If there is an option to View Appeal, an appeal or inquiry has already been submitted for this claim. Please **DO NOT** submit an additional appeal unless a decision has been rendered on the initial appeal.

Figure 11: View Appeal button



2. On the *Appeal Details* screen, the claim number will appear at the top of the page. Select a reason for the appeal from the **Please choose a reason for your appeal of this decision** dropdown.

Utilize the “**other (please explain)**” selection if an inquiry is being submitted.

3. Enter a detailed description related to the reason for the appeal or inquiry in the **Please provide a detailed description of your reason for this appeal** text box and attach documents as needed.

When requesting a claim appeal for multiple claims with the same denial reason, please ensure that all affected claims are listed on the approved claim submission spreadsheet and attached to the appeal. The template can be found on our [Claim Reconsideration](#) webpage.

Note: Up to 10 supporting documents can be attached.

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Figure 12: Appeal Detail Screen

Appeal Details

Claim [+ Show Claim Details](#)

Provide any details and reference information in the description section below, along with any medical records and document attachments for substantiating your appeal.

Please choose a reason for your appeal of this decision *

Select a reason from this list

Please provide a detailed description of your reason for this appeal *

Please enter the details of your appeal.

Should we need to contact you for additional information, what is the best phone number?

Enter phone number (optional)

Entering a number here will not update your Contact Phone Number or alter your Contact Preferences.

Attach Documentation (if applicable)

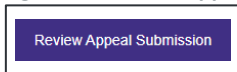
NOTE: You are limited to 10 attachments and 45MB total file size.

[+ Add Files](#)

[Review Appeal Submission](#)

- Once required fields are populated, the *review appeal submission* button at the bottom of the screen will highlight. Click **Review Appeal Submission** to proceed to the *Confirm Your Submission* screen.

Figure 13: Review Appeal Submission Button



- Once information is reviewed, select **Submit Appeal** to reach the *Submission Complete* Screen.

Figure 14: Confirm Your Submission Screen

Confirm Your Submission

You are appealing the decision related to

Claim

The reason for your appeal is:

Medical necessity of the service

Your detailed description:

The services provided were indeed medically necessary. Test

Documentation

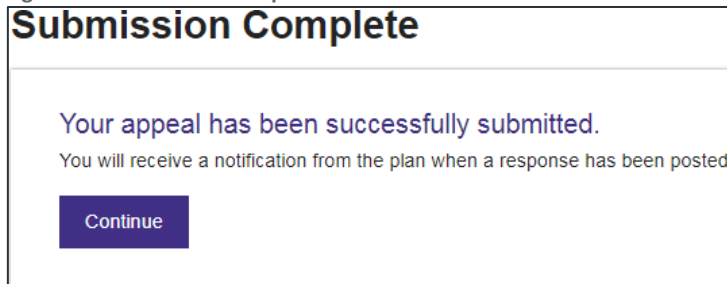
No Attachments

If these submission details are accurate, click Submit Appeal to complete the process.

[< Make Changes](#) [Submit Appeal](#)

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Figure 15: Submission Complete Screen

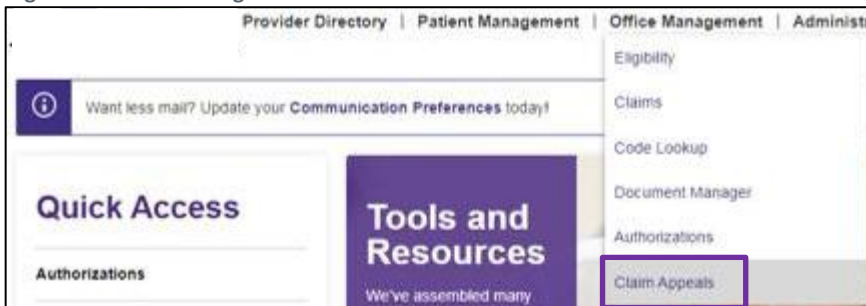


6. Click *continue* to reach the appeals search screen.

Claim Appeal Status

1. From the navigation menu, click **Office Management > Claim Appeals**. The *Appeals Search* screen will display.

Figure 16: Office Management Menu



2. From the *Appeals Search* screen, there are options to search by Issue Type, Status or Submitter.

Figure 17: Appeals Search Screen



3. For additional search options, select **Advanced Search Options** next to the **Search** expand the advanced search menu. This allows for a search by issue number and date range.

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Figure 18: Advances Search Menu

Appeals

Search Issues

Issue Type
Appeals

Status
All statuses

Submitted by
Anyone

Issue
 Open Issues
 Resolved Issues
 Both

Issue number
Select...

Date Range - Submitted
7+ days 30+ days 45+ days 90+ days

Date Range - Last Activity
7+ days 30+ days 45+ days 90+ days

Start date End date Start date End date

Search Advanced Search Options

4. Enter search criteria in any field and select **Search**. This will populate search results.
5. The status of the appeal/inquiry will appear on the right side of each item listed in the search results and on the top right corner of the appeals details screen.

Figure 19: Search Results

Appeals

Search Issues

Issue Type
Appeals

Status
All statuses

Submitted by
Anyone

Search Advanced Search Options

LEVEL 1 APPEAL CLAIM# MEMBER: JOHN SMITH

Medical necessity of the service
The services provided were indeed medically necessary.

PROVIDER SUBMITTED: JUN 30, 2022

ID #

PENDING REVIEW

6. Click on an item from the search results for additional details.

Figure 20: Appeal Details

Home > Appeals

Claim # Appeal

Level 1 Appeal

PROVIDER SUBMITTED Jun 30, 2022

ID #10000052

PENDING REVIEW

Medical necessity of the service
The services provided were indeed medically necessary. Test

Claim Summary

Member Name John Smith	Member ID	Member DOB
Provider	Billed \$100.42	Paid \$0.00
Date of Service Aug 26, 2019	Claim Receipt Date Jan 17, 2020	Adjudication Date May 3, 2020
Claim Procedures Unknown	Place of Service Unknown	Status Denied

Cancel this issue
This issue will be withdrawn from further review or reconsideration and will only remain available for viewing purposes.

Cancel Issue

Documents
All documents attached to this submission are shown below.

No documents found for this submission.

Hide complete submission and attached documents

Note: Requests may also be cancelled from this screen.