

Claim Status Search and Claim Appeals 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

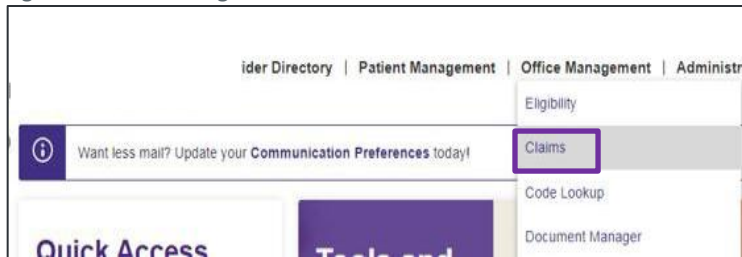


Figure 2: Claim Status Search Screen

Claim Status Search

Claim Number

Date of Service

5/21/2025

To

8/21/2025

Processed Date

To

Patient

Last Name

Member ID

Patient Account Number

(Patient List)

(Last Name Example - Smith, John)

(ID Example - HP5555555, HP4444444)

(SSN Example - 555-55-5555, 444-44-444)

(Medicaid ID Example - AA55555, AA44444)

(Medicare ID Example - 5555555, 4444444)

Provider

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

☒ Pending

☒ Denied

☒ Voided

☒ Rejected

☒ Forwarded

☒ Submitted

Search

Clear

Claim Status Search and Claim Appeals Guide

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

Claim Status Search Results						
View EOP	Claim Number	Status	Patient	Patient Account No.	DOS	Processed Date
View	20250903005842	Finalized	SMITH, John		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

Claim Status Detail for

[View Appeal](#)
[Appeal Claim](#)
[Print](#)

Claim Level Information

Provider

Practice

Patient

Patient Account No.

Ref/Auth Number: None

Claim Receipt Date: 04/22/22

Referring Provider

Diagnosis: I10: ESSENTIAL PRIMARY HYPERTENSION
 Z68.41: BODY MASS INDEX (BMI) 40.0-44.9, ADULT
 Z23: ENCOUNTER FOR IMMUNIZATION

Admit Date

Discharge Date

Service Line Information

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

Claim Status Search and Claim Appeals Guide

Claim Status Search from the Patient Management Menu

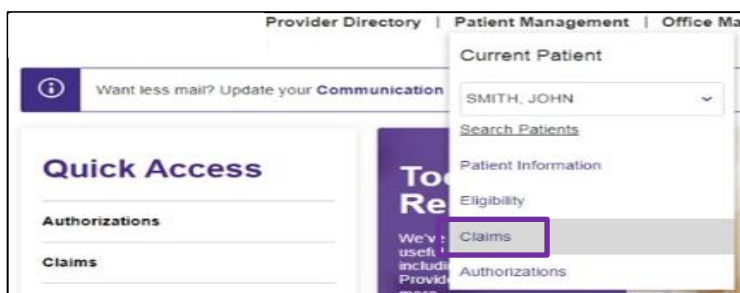
1. From the navigation menu, click **Patient Management**.

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

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

Note: Click a column header to sort claim results by that column.

Claim Status Search and Claim Appeals Guide

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.
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 8: Claim Status Detail Screen

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

Claim Status Search and Claim Appeals Guide

Submitting a Claim Appeal

- 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, select the *Appeal Claim* button. This will open the *Appeal Details* screen.

Figure 9: Claim Status Detail Screen



Note: If there is an option to View Appeal, an appeal 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 10: View Appeal button



- On the *Appeal Details* screen, the appealed 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.
- Enter a detailed description related to the reason for the appeal in the **Please provide a detailed description of your reason for this appeal** text box and attach documents as needed.
Note: Up to 10 documents can be attached to support the reason for the appeal.

Figure 11: 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.

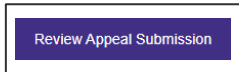
+ Add Files

Review Appeal Submission

Claim Status Search and Claim Appeals Guide

- 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 12: Review Appeal Submission Button



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

Figure 13: 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

Figure 14: Submission Complete Screen

Submission Complete

Your appeal has been successfully submitted.

You will receive a notification from the plan when a response has been posted.

Continue

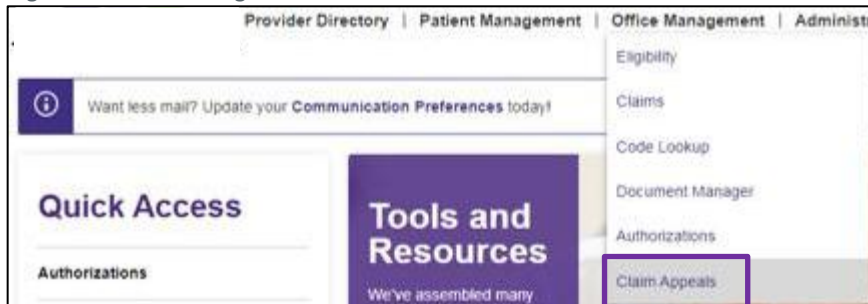
- Click *continue* to reach the appeals search screen.

Claim Status Search and Claim Appeals Guide

Claim Appeal Status from the Office Management Menu

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

Figure 15: Office Management Menu



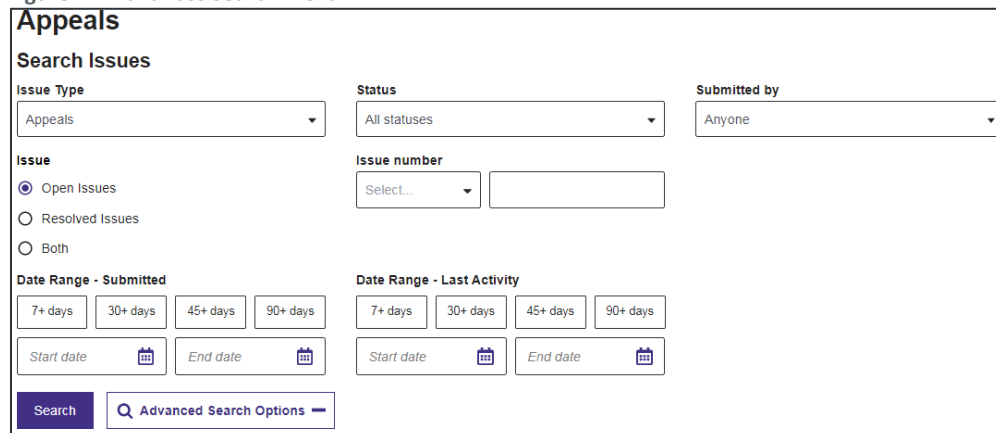
2. From the *Appeals Search* screen, there are options to search by Issue Type, Status or Submitter.

Figure 16: 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.

Figure 17: Advances Search Menu



Claim Status Search and Claim Appeals Guide

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

Figure 18: Search Results

Appeals

Search Issues

Issue Type: Appeals
Status: All statuses
Submitted by: Anyone

Search [Q 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 the appeal from the search results for additional appeal details.

Figure 19: 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 \$108.42	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: Claim appeals may also be cancelled from this screen.

Claim Status Search and Claim Appeals Guide

View Explanation of Payment (EOP)

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

Figure 20: 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.