

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

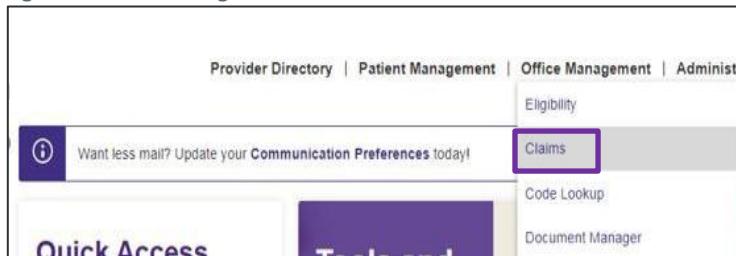
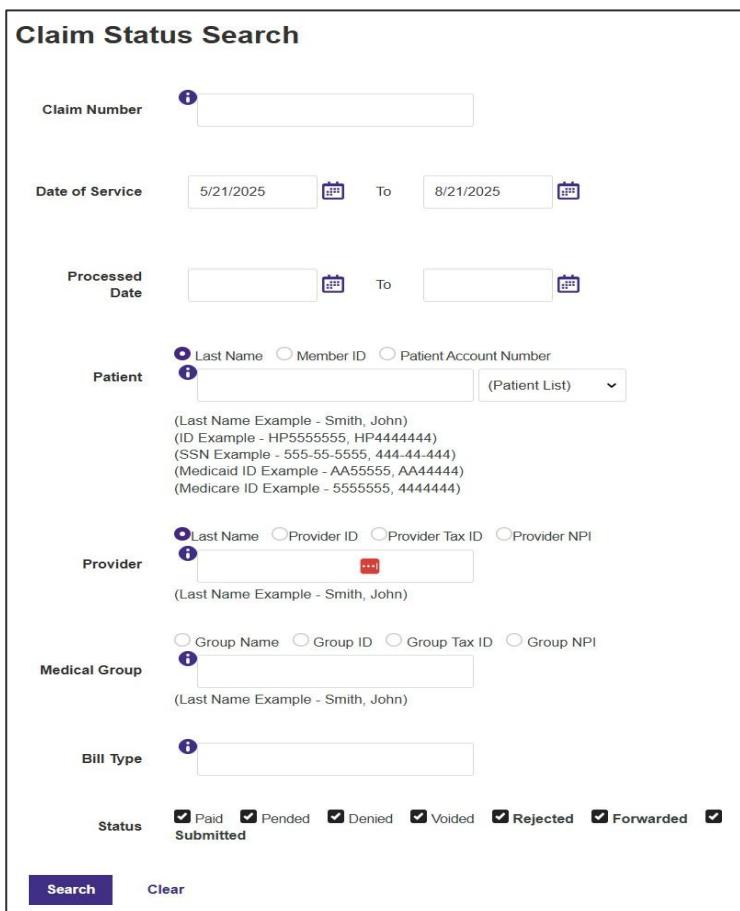


Figure 2: Claim Status Search Screen


 A screenshot of the 'Claim Status Search' interface. The form includes fields for 'Claim Number', 'Date of Service' (from 5/21/2025 to 8/21/2025), 'Processed Date', 'Patient' (with dropdown for Last Name, Member ID, Patient Account Number, and a 'Patient List' button), 'Provider' (with dropdown for Last Name, Provider ID, Provider Tax ID, and Provider NPI, and a 'Provider List' button), 'Medical Group' (with dropdown for Group Name, Group ID, Group Tax ID, and Group NPI, and a 'Medical Group List' button), 'Bill Type' (with dropdown), and 'Status' (checkboxes for Paid, Pended, Denied, Voided, Rejected, Forwarded, and Submitted). At the bottom are 'Search' and 'Clear' buttons.

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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



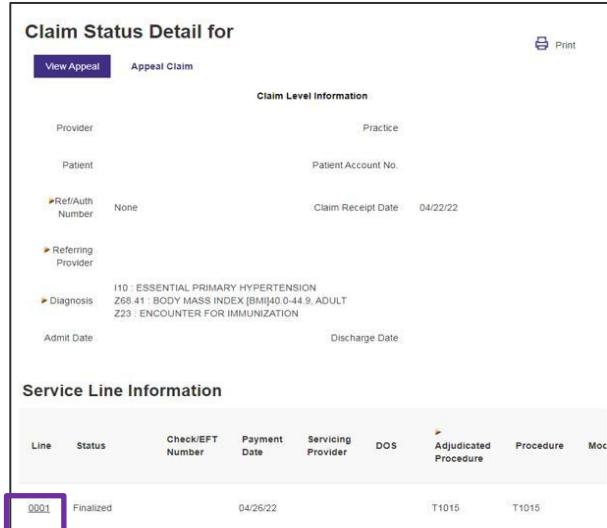
View EOP	Claim Number	Status	Patient	Patient Account No.	DOS	Processed Date
View	20250903005842	Finalized	SMITH JOHN		08/29/19	05/03/20

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.							
RefAuth 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	Mod
0001	Finalized		04/26/22		T1015		T1015	

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Claim Status Search from the Patient Management Menu

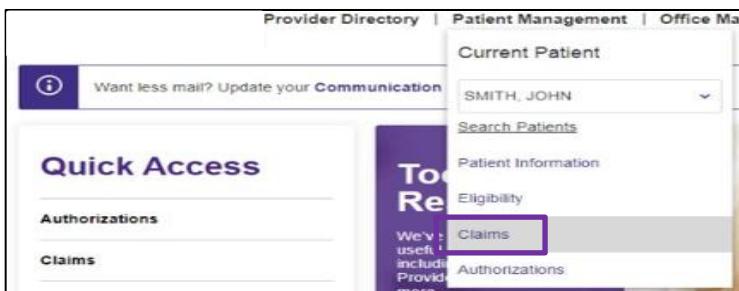
1. From the navigation menu, click **Patient Management**.

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.

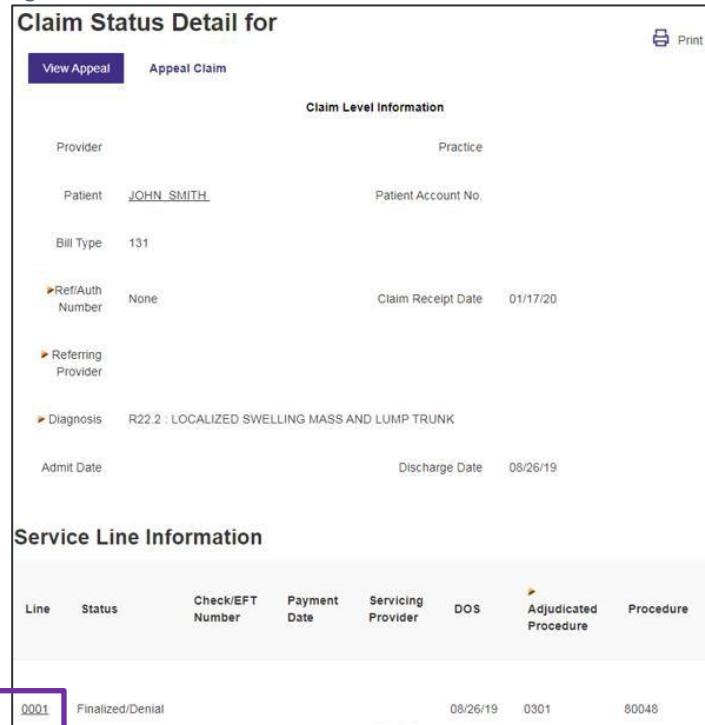
Figure 7: Claim Status Search Results for Member Screen

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.						

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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



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

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 9: Claim Status Search Results Screen



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

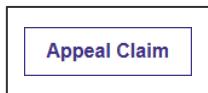
Note: EOP will obtain details for all claims processed under the check/draft number.

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Submitting a Claim Appeal or Inquiry

- 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



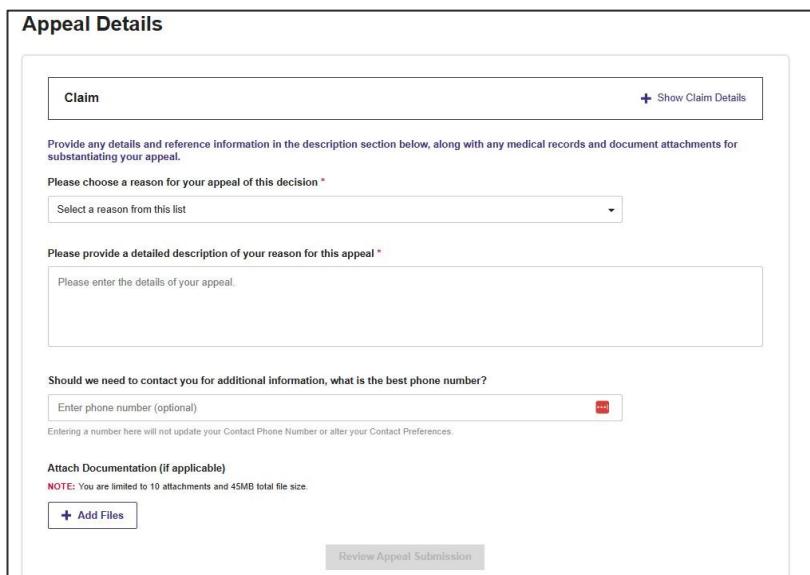
- On the *Appeal Details* screen, the claim number will appear at the top of the page. Select a reason for the appeal from the **Please choose a reason for your appeal of this decision** dropdown.
Utilize the “**other (please explain)**” selection if an inquiry is being submitted.
- Enter a detailed 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)

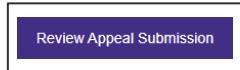
NOTE: You are limited to 10 attachments and 45MB total file size.

[+ 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.

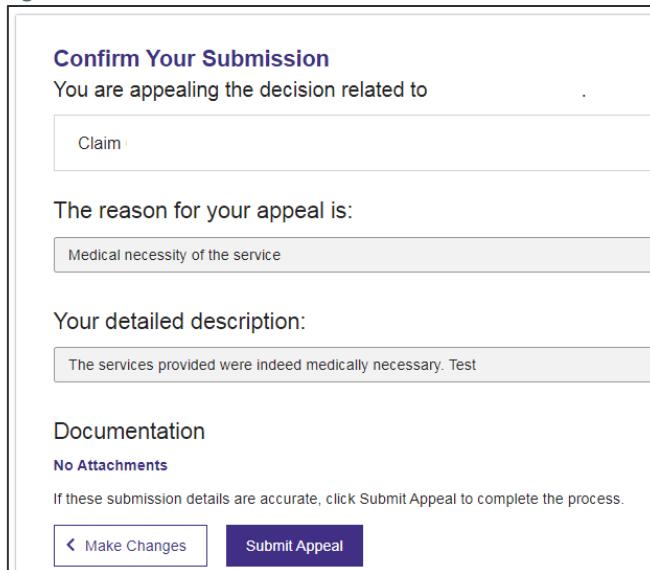
Figure 13: Review Appeal Submission Button



[Review Appeal Submission](#)

- 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

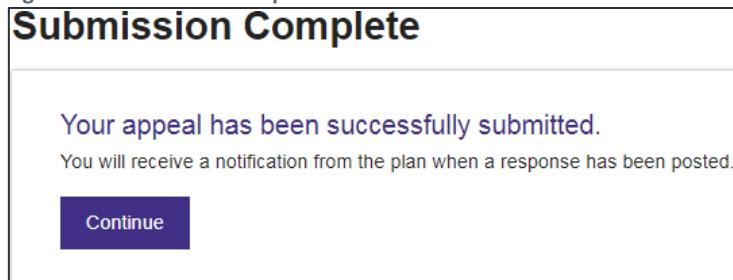
No Attachments

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

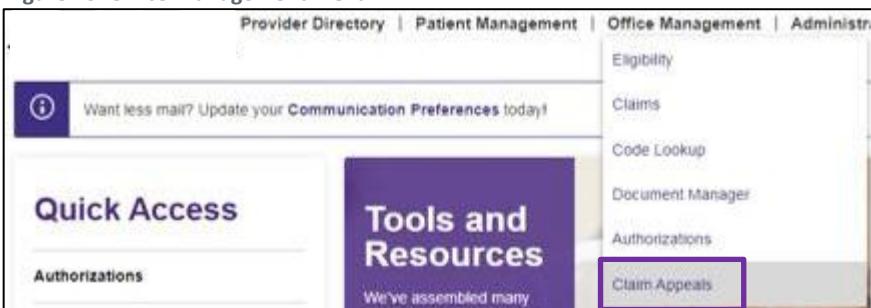


6. Click *continue* to reach the appeals search screen.

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.

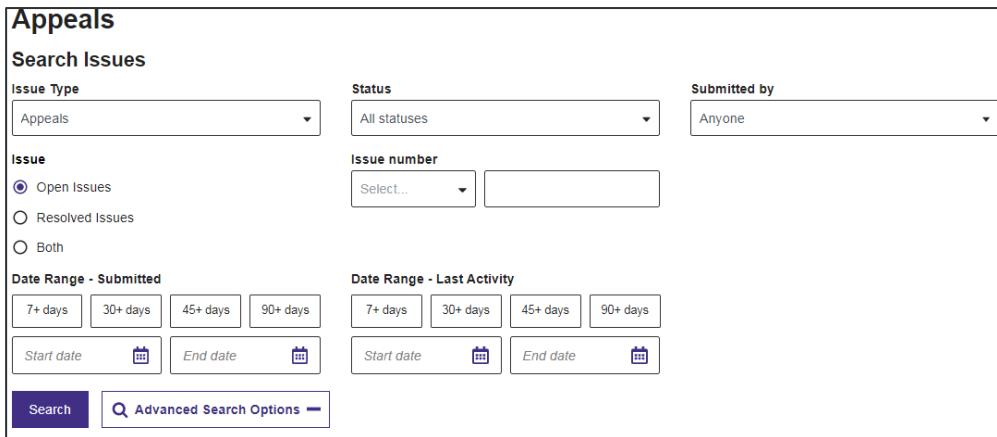
Figure 17: Appeals Search Screen



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:

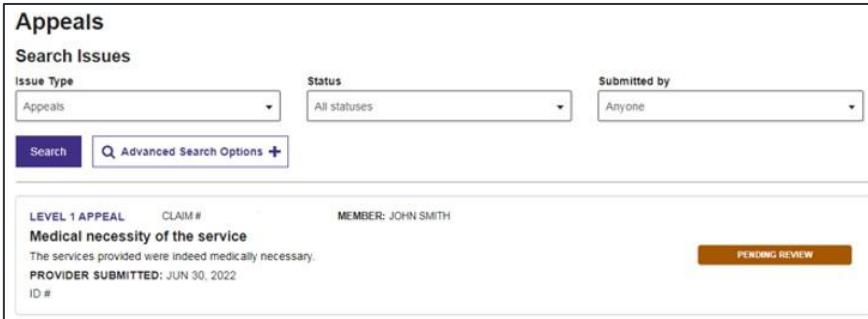
Date Range - Submitted: **Date Range - Last Activity**:

Start date **End date**

Search **Advanced Search Options**

- Enter search criteria in any field and select **Search**. This will populate search results.
- 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.

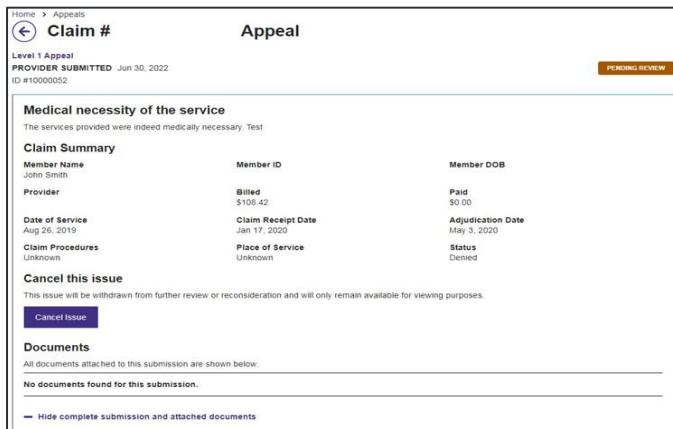
PROVIDER SUBMITTED: JUN 30, 2022

PENDING REVIEW

ID #

- 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 # 10000002

PENDING REVIEW

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

Claim Summary

Member Name	Member ID	Member DOB
John Smith		
Provider	Billed	Paid
	\$108.42	\$0.00
Date of Service	Claim Receipt Date	Adjudication Date
Aug 26, 2019	Jan 17, 2020	May 3, 2020
Claim Procedures	Place of Service	Status
Unknown	Unknown	Denied

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

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.