

# 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

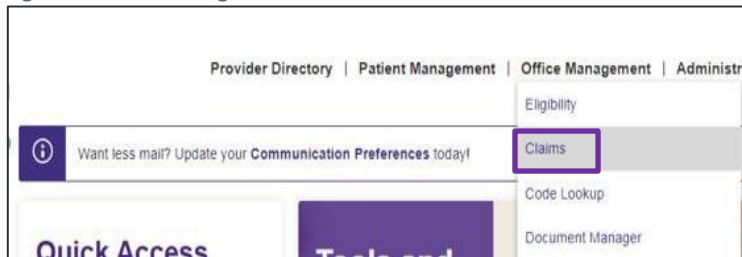


Figure 2: Claim Status Search Screen

### Claim Status Search

Claim Number

Date of Service

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

Page 1 of 8

## Claim Status Search, Appeals and Inquiries 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
<a href="#">View</a>	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

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, Appeals and Inquiries Guide

## Claim Status Search from the Patient Management Menu

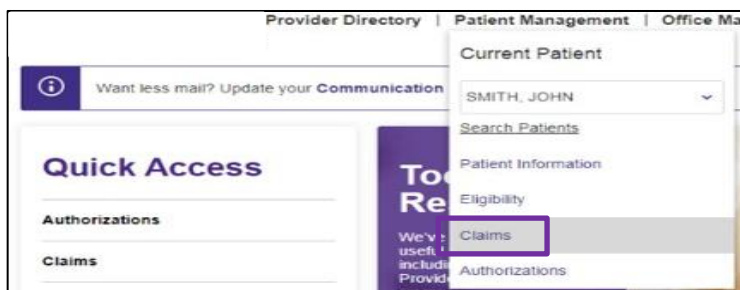
1. From the navigation menu, click **Patient Management**.

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
<a href="#">View</a>		Finalized	<a href="#">SMITH, JOHN</a>		08/29/19	05/03/20

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

## Claim Status Search, Appeals and Inquiries Guide

- 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** Print

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

**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
<u>0001</u>	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
<a href="#">View</a>		Finalized	<u>SMITH, JOHN</u>		08/29/19	05/03/20

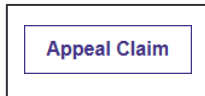
**Note:** EOP will obtain details for all claims processed under the check/draft number.

# Claim Status Search, Appeals and Inquiries Guide

## 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.

# Claim Status Search, Appeals and Inquiries Guide

Figure 12: Appeal Detail Screen

- 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.

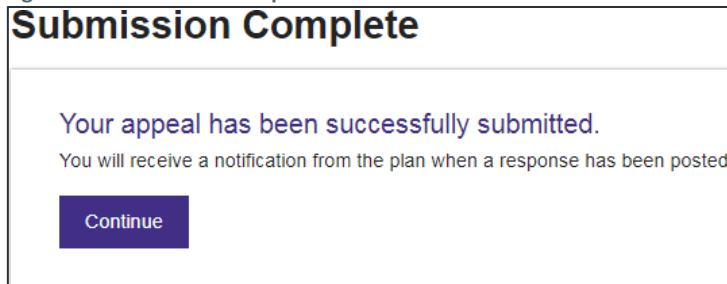
Figure 13: Review Appeal Submission Button

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

Figure 14: Confirm Your Submission Screen

## Claim Status Search, Appeals and Inquiries Guide

Figure 15: Submission Complete Screen

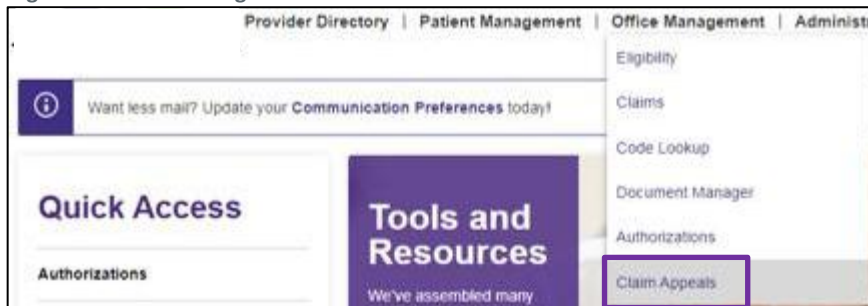


6. Click *continue* to reach the appeals search screen.

### 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.

# Claim Status Search, Appeals and Inquiries Guide

Figure 18: Advances Search Menu

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

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

Figure 20: Appeal Details

**Note:** Requests may also be cancelled from this screen.