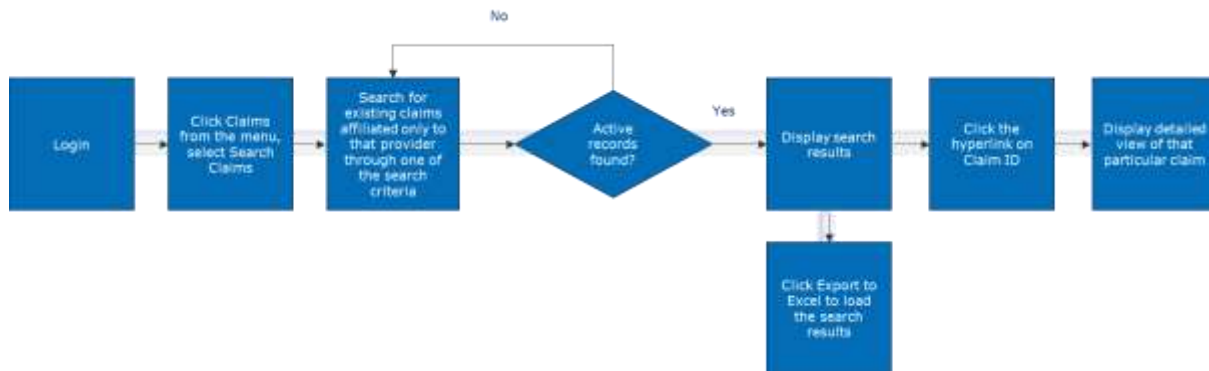


Provider Portal Claims - Search, View, and Export

Quick Reference Guide (QRG)




This Quick Reference Guide (QRG) will provide an overview of how to Search, View, and Export Claims.



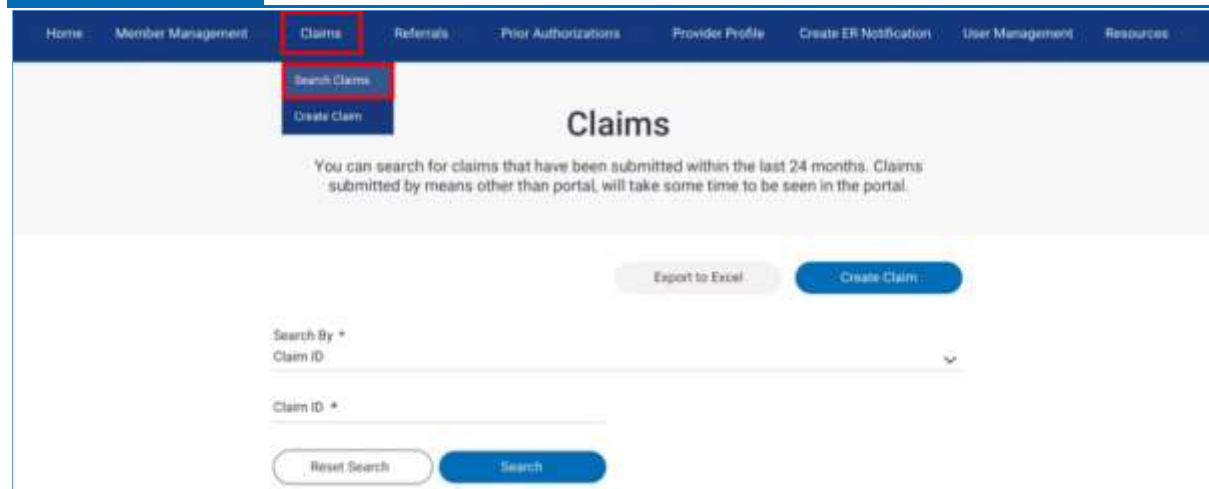
Let us look at the steps in detail to search, view, and export claims.

Purpose: To Search, View, and Export Claims.



Step 1:

1. From the **Provider Portal Home** screen, select the **Claims** tab.
2. Select **Search Claims**.





Step 2:

1. In the **Search By** field, select the desired option from the drop-down. For this example, we will use **Member Name**.

Note: If you search by **Member Name**, **Servicing Provider Name**, and **Servicing Provider NPI**, it is a multi-step process. You must provide the Service date range to view the claim search results after you have the member or service provider details to view the claims.

In contrast, it is a one-step process to view the claim search results, if you search by **Claim ID**, **Member ID**, **Remittance Number**, **Check Number**, **Paid Date**, and **Patient Control Number**.

Claims

You can search for claims that have been submitted within the last 24 months. Claims submitted by means other than portal, will take some time to be seen in the portal.

Export to Excel

Create Claim

Search By *

Claim ID

- ✓ Claim ID
- Member ID
- Member Name
- Servicing Provider Name
- Servicing Provider NPI
- Remittance Number
- Check Number
- Paid Date
- Patient Control Number



Step 3:

1. If you are searching by **Member Name**, fill in the **First Name, Last Name**, and **Member DOB** (Date of Birth).
2. Click **Search**.

Export to Excel Create Claim

Search By *
Member Name ▼

First Name * Last Name *

Member DOB *

Reset Search Search



Step 4:

1. The Member's details display. Users will be able to see claims in which he/she (user account) is associated with as a rendering, admitting, servicing, or referring provider, or servicing facility.
2. Enter the service date range of the claim(s) in the **Service Date From** and **Service Date To** fields.
3. Click **Search**.

Select Member

Member ID	Member Name	Date of Birth	Address
K10017860001	Patterson, Valerie	09/21/1983	3404 Courts Lane, West Hartford, Connecticut, 06105

Service Date From * Service Date To *

01/15/2021 02/15/2021

Reset Search Search



Step 5:

1. The claims matching your search criteria display.
2. You can use **Filter By** to target the required claim from the search results.

Filter By

Claim ID	Status	Member Name	Servicing Provider Name	Servicing Provider Tax ID	Service Start Date	Service End Date	Paid Amount	Adjusted
P21A00106893	Finalized	Patterson, Valerie	Mt Sinai Genomic Inc	72518300	01/15/2021	01/15/2021	\$40.00	P21A001
P21A00106893	Finalized	Patterson, Valerie	Baker, James	89518301	02/03/2021	02/03/2021	\$100.00	P21A001

Total Records: 1 < Showing 1-1 >



Step 6:

1. Click **Reset Search** to clear the search criteria.
2. Click **Export to Excel** to export the claim report.

Claims

You can search for claims that have been submitted within the last 24 months. Claims submitted by means other than portal, will take some time to be seen in the portal.

Export to Excel
Create Claim

Search By *
 Servicing Provider Name ▼

Servicing Provider Name *
 Mt Sinai Genomic Inc ⓘ Specialty ⓘ

City _____ State ▼

Zip Code _____

Select Provider

Provider Name	Address	Tax ID	NPI
Mt Sinai Genomic Inc	465 James Farm Rd, Stratford, Con	01/15/2021	#16126/71 1013488149

Service Date From *
 01/01/2021 ⓘ Service Date To *
 01/20/2021 ⓘ

Reset Search
Search

Filter By ⓘ

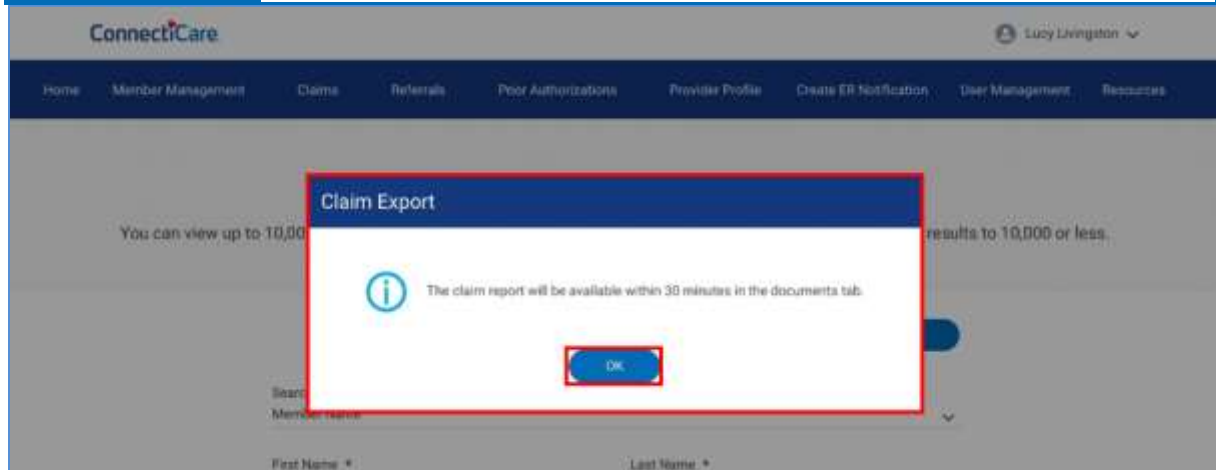
Claim ID	Status	Member Name	Servicing Provider Name	Servicing Provider Tax ID	Service Start Date	Service End Date	Paid Amount	Adjusted
P21A00106893	Finalized	Patterson, Valerie	Mt Sinai Genomic Inc	72518300	01/15/2021	01/15/2021	\$40.00	P21A001

Your search returned 1 results. < Showing 1-1 >



Step 7:

1. The Claim report will be available in the **Documents** tab.
2. If you click **OK**, the report will download as a CSV file. The report will be available only to the user who has generated the report.



Thank
You