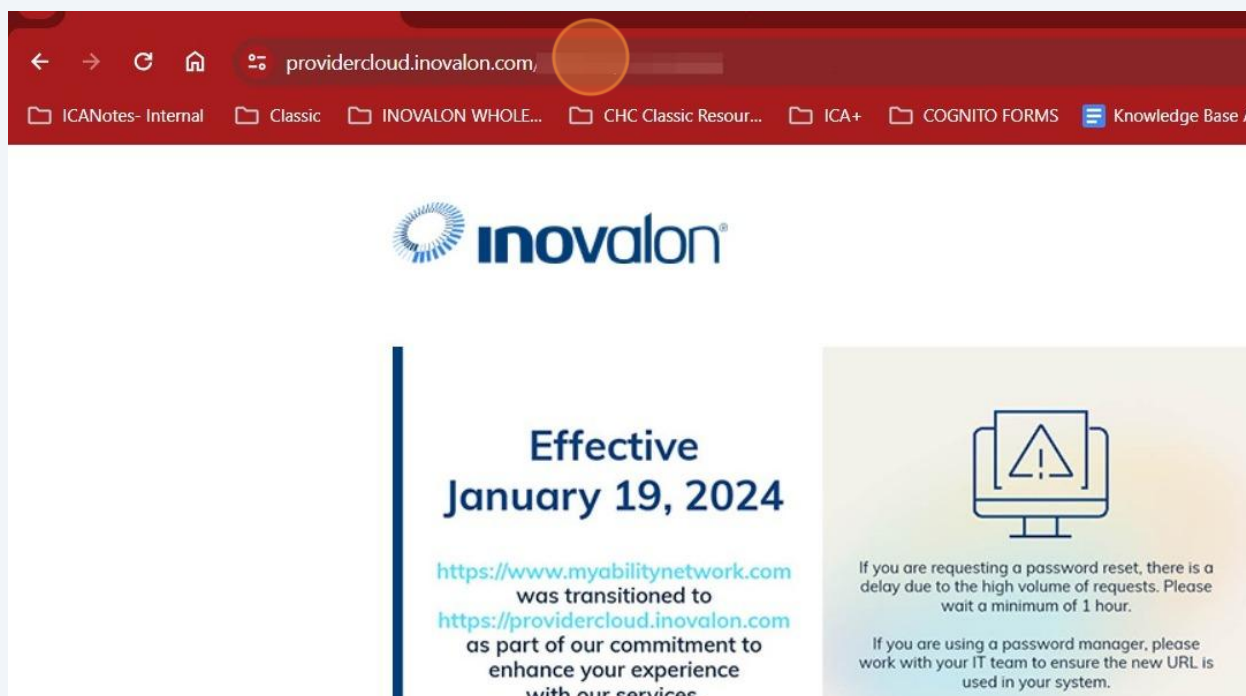


ICANotes Guide To Managing Claims In Your Inovalon Portal~

This guide provides step-by-step instructions on managing claims in the Inovalon Portal. It covers topics such as customizing columns, filtering claims, understanding claim statuses, fixing errors, deleting and undeleting claims, and checking patient eligibility. It is a comprehensive resource for anyone using the Inovalon Portal to efficiently manage their claims process.

- 1 Go to your Provider Log in Page www.providercloud.inovalon.com



2 Click "Secure Sign In"

If you are requesting a password reset, there is a delay due to the high volume of requests. Please wait a minimum of 1 hour.

If you are using a password manager, please work with your IT team to ensure the new URL is used in your system.

WELCOME

TO THE PLACE ON OUR SITE THAT IS ALL ABOUT **YOU**

Username:
janina@icanotes.com

Password:
.....

[Forgot Password?](#)

Secure Sign In

Us

Contact Us

888.460.4310

3 Click "Back-end RCM"

Front-end RCM | Back-end RCM | Care Management | Tracking | Analytics

My Workspace

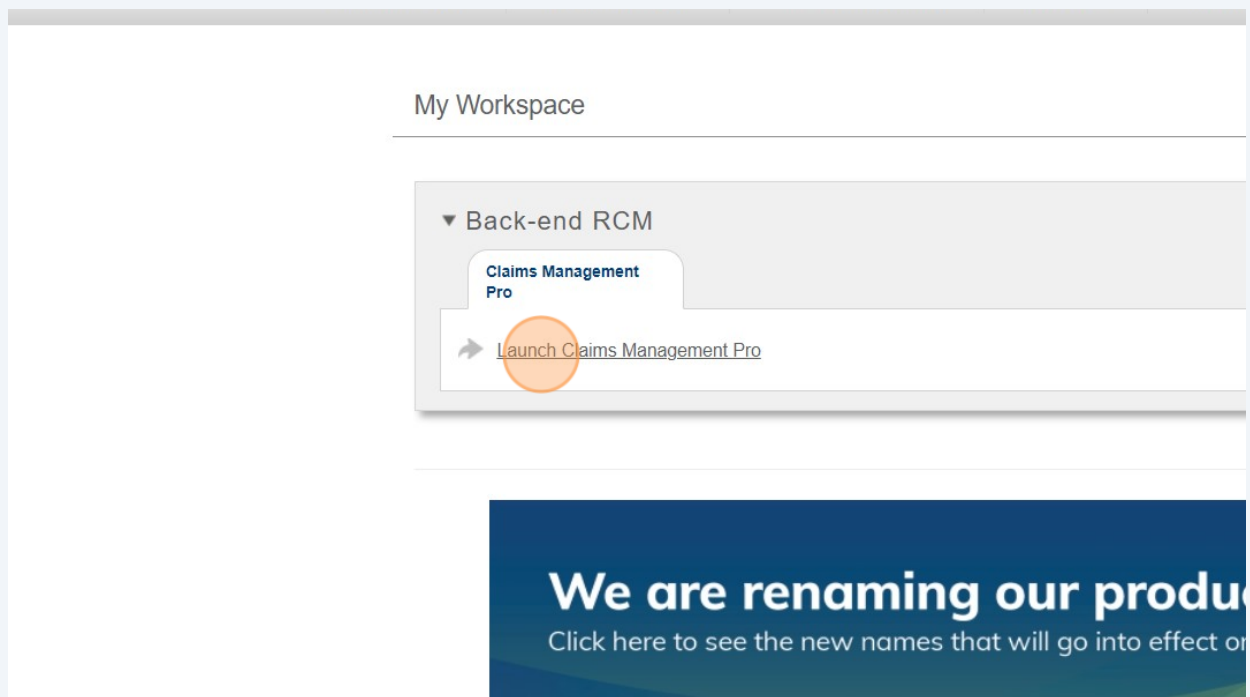
▲ Back-end RCM

Claims Management Pro

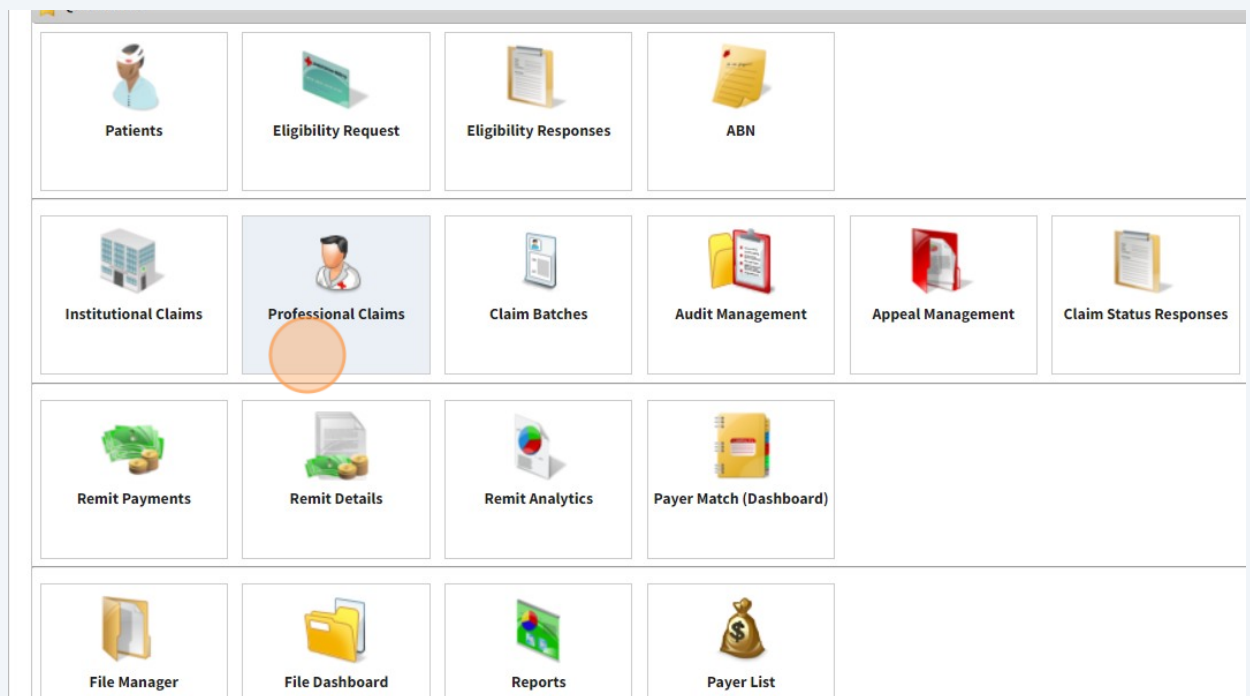
We are renaming our products

Click here to see the new names that will go into effect on

4 Click "Launch Claims Management Pro"



5 Click "Professional Claims"



6

Click "View 15 records per page" to modify how many claims you want to see per page. You can select up to 90 claims per page.

Comma delimited list of account numbers - Limit 20 Last,First (First name is optional) Comma delimited list of Payer ICN's.

Search Clear ☐ Ignore Profiler Filters

Create Claim **Release** **Valid**

☐	Create Date	Create Mode	Patient Control Number	Patient Name	Total Charge	Fr
☐	04/25/24 16:55:25	IMPORT			162.00	0:
☐	04/25/24 16:55:36	IMPORT			318.00	0:
☐	04/25/24 16:55:40	IMPORT			162.00	0:
☐	04/25/24 16:55:44	IMPORT			130.00	0:
☐	04/25/24 16:55:59	IMPORT			318.00	0:
☐	04/25/24 16:56:15	IMPORT			205.00	0:
☐	04/25/24 16:56:16	IMPORT			162.00	0:

View 90 records per page Page 1 of 8

Profiler

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7

Click "Slide Open"

Comma delimited list of account numbers - Limit 20 Last,First (First name is optional) Comma delimited list of Payer ICN's.

Search Clear ☐ Ignore Profiler Filters

Create Claim **Release** **Valid**

☐	Create Date	Create Mode	Patient Control Number	Patient Name	Total Charge	Fr
☐	04/25/24 16:55:25	IMPORT			162.00	0:
☐	04/25/24 16:55:36	IMPORT			318.00	0:
☐	04/25/24 16:55:40	IMPORT			162.00	0:
☐	04/25/24 16:55:44	IMPORT			130.00	0:
☐	04/25/24 16:55:59	IMPORT			318.00	0:
☐	04/25/24 16:56:15	IMPORT			205.00	0:
☐	04/25/24 16:56:16	IMPORT			162.00	0:

View 90 records per page Page 1 of 8

Profiler

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8 Click "Update Columns" if you want to customize the information columns

Settings ▾ System ▾ Training ▾

(0) Rows Selected - [Deselect All](#) | [Select Max](#) | Range: 1 Year ▾

Payer ICN
Comma delimited list of Payer ICN's.

Payer Name

Payer ID
Comma delimited list of Payer ID's.

Customize Quick Search

Release Validate Print More Options ▾ Reload Grid **Update Columns** Export Wizard

Page 1 of 8

Total Charge	From Date	Payer Name	Media	Status	Action
162.00	01/13/24	AETNA	E	ACK_PENDING	
318.00	01/17/24	AETNA	E	ERROR	
162.00	01/17/24	AETNA	E	ACK_PENDING	
130.00	01/18/24	AETNA	E	ACK_PENDING	
318.00	01/19/24	AETNA	E	ERROR	

9 You can enable/disable options at your discretion. Click Save

ate Mode
ontrol Number
ent Name
al Charge
ym Date
er Name
Media
Status

☐ Appeal type
☐ Billing NPI
☐ Days To Bill
☐ Days To Transmit
☐ Error Message
☐ Has Attachment
☐ ID
☐ Last Updated by User
☐ Modified Date
☐ Notes
☐ Patient DOB
☐ Payer ID
☐ Payer Type
☐ Print Date
☐ Referring NPI
☐ Reimbursement Defined
☐ Remit Remarks
☐ Rendering Provider
☐ Subscriber Name
☐ Units
☒ Create Mode
☒ Total Charge
☒ Media

☐ Assignment
☐ Billing Provider
☐ Days To Create
☐ Diagnosis Codes
☐ Follow-up
☐ Health Plan Id
☐ Insurance Payment
☐ Medical Record No
☐ Modifiers
☐ POS
☐ Patient Payment
☐ Payer ID (internal)
☐ Payer Type (internal)
☐ Print Mail
☐ Referring Provider
☐ Reject Message
☐ Remit Status
☐ Review Date
☐ Through Date
☐ Uploaded By
☒ Patient Control Number
☒ From Date
☒ Status

☐ Billing EIN
☐ Billing Taxonomy
☐ Days To Pay
☐ EFT/Check Number
☐ HCPCS/CPT
☐ Hold
☐ Last Updated Date
☐ Member ID
☐ Note Date
☐ Patient Address
☐ Payer ICN
☐ Payer Seq
☐ Payment Date
☐ Provider Alias
☐ Reimbursement Amount
☐ Remit Assignment
☐ Rendering NPI
☐ Service Facility NPI
☐ Transmit Date
☒ Create Date
☒ Patient Name
☒ Payer Name

Save Cancel

Page 1 of 8

Profiler

Payer ID
Comma delimited list of Payer ID's.

ons ▾ Reload Grid Update Column

Media	Status
E	ACK_PENDING
E	ERROR
E	ACK_PENDING
E	ACK_PENDING
E	ERROR
E	ACK_PENDING
E	ACK_PENDING

- 10 Saved options will be your default options. You can update these at anytime.

Payer ICN Payer Name Payer ID
Comma delimited list of Payer ICN's. Comma delimited list of Payer ID's.

Customize Quick Search

Release Validate Print More Options ▾ Reload Grid Update Columns Export Wizard

Page 1 of 8

Total Charge	From Date	Payer Name	Media	Status	Action
162.00	01/13/24	AETNA	E	ACK_PENDING	
318.00	01/17/24	AETNA	E	ERROR	
162.00	01/17/24	AETNA	E	ACK_PENDING	
130.00	01/18/24	AETNA	E	ACK_PENDING	
318.00	01/19/24	AETNA	E	ERROR	
205.00	01/24/24	AETNA	E	ACK_PENDING	
162.00	01/24/24	AETNA	E	ACK_PENDING	

- 11 Feel free to drag these tabs left to right to reorganize columns to your liking. Additionally, clicking on a specific column will filter that specific column by least to greatest or vice versa as well as in alphabetical order.

Payer ICN Payer Name Payer ID
Comma delimited list of Payer ICN's. Comma delimited list of Payer ID's.

Customize

Create Claim Release Validate Print More Options ▾ Reload Grid Update Columns

Name	Total Charge	From Date	Media	Payer Name	Status
	162.00	01/13/24	E	AETNA	ACK_PENDING
	318.00	01/17/24	E	AETNA	ERROR
ONY	162.00	01/17/24	E	AETNA	ACK_PENDING
A	130.00	01/18/24	E	AETNA	ACK_PENDING
	318.00	01/19/24	E	AETNA	ERROR
YN	205.00	01/24/24	E	AETNA	ACK_PENDING
I	162.00	01/24/24	E	AETNA	ACK_PENDING

12 Click Quick Search to activate quick search options of submitted claims.

Home Dashboards Patients **Claims** Collections Reporting Settings System

Professional Claims

Quick Search  Profiler

Patient Control Number

☐ Partial ID 

Patient Name

Payer ICN

Search Clear ☐ Ignore Profiler Filters

Create Claim Release Valid

☐	Create Date	Create Mode	Patient Control Number	Patient Name	Total Charge	Fr
☐	04/25/24 16:55:25	IMPORT		MENDOZA, EVELYN	162.00	0:
☐	04/25/24 16:55:36	IMPORT		V	318.00	0:
☐	04/25/24 16:55:40	IMPORT		M	162.00	0:
☐	04/25/24 16:55:44	IMPORT		S	130.00	0:
☐	04/25/24 16:55:59	IMPORT		J	318.00	0:

13 Click "Profiler" to open more specific filtering option for claim search options

Home Dashboards Patients **Claims** Collections Reporting Settings System

Professional Claims

Quick Search  **Profiler**

Create Claim Release Valid

☐	Create Date	Create Mode	Patient Control Number	Patient Name	Total Charge	Fr
☐	04/25/24 16:55:25	IMPORT			162.00	0:
☐	04/25/24 16:55:36	IMPORT			318.00	0:
☐	04/25/24 16:55:40	IMPORT			162.00	0:
☐	04/25/24 16:55:44	IMPORT			130.00	0:
☐	04/25/24 16:55:59	IMPORT			318.00	0:
☐	04/25/24 16:56:15	IMPORT			205.00	0:
☐	04/25/24 16:56:16	IMPORT			162.00	0:
☐	04/25/24 16:56:17	IMPORT			115.00	0:

14 Click on one or more options ranging from dates to status types.

The screenshot shows the 'Filters' panel with two main columns: 'Events' and 'Status'. The 'Events' column is divided into three sections: 'Created', 'Modified', and 'Transmitted'. The 'Transmitted' section is highlighted with an orange circle. The 'Status' column contains a list of status types, including 'Work Queue', 'Error', 'Released', 'Created', 'Queued', 'Deleted', 'Crossover', 'Acknowledged', 'Ack Pending', 'Paid', 'Denied', 'Hold Note', and 'Claim Note'. The 'Transmitted' section under 'Events' includes options like 'Today', 'Date Range', 'Same Day As Created', and 'Date Within'.

15 You can always undelete deleted claims from your worklist as an option. Then click Apply

The screenshot shows the 'Filters' panel with two main columns: 'Events' and 'Status'. The 'Status' column contains a list of status types, including 'Work Queue', 'Error', 'Released', 'Created', 'Queued', 'Deleted', 'Crossover', 'Acknowledged', 'Ack Pending', 'Paid', 'Denied', 'Hold Note', and 'Claim Note'. The 'Deleted' status option is highlighted with an orange circle. The 'Transmitted' section under 'Events' includes options like 'Today', 'Date Range', 'Same Day As Created', and 'Date Within'.

16

The tabs labeled Profiler at the top and bottom of the screen offer the same options

claim/browseprof/

WHOLE... CHC Classic Resour... ICA+ COGNITO FORMS Knowledge Base Art... BILLING RESOURCES ICA Drive

Janina Russian | Log Out | 4L-A Clinic and Consultant

Claims ▾ Collections ▾ Reporting ▾ Settings ▾ System ▾ Training ▾

(0) Rows Selected

▼ Profiler ▼

Status

☐ Work Queue ☐ Transmit ☐ List ☐ Original

17

The Status Column will let you know the current status of your claim. Click the notepad under the "Action" column to open that specific claim. There will be 2 images included in this tutorial that explains each status details/meanings.

Settings ▾ System ▾ Training ▾

(0) Rows Selected - [Deselect All](#) | [Select Max](#) | Range: 1 Year ▾

Release Validate Print More Options ▾ Reload Grid Update Columns Export Wizard

Page 1 of 8

Total Charge	From Date	Payer Name	Media	Status	Action
162.00	02/15/24	AETNA	E	ACK_PENDING	
318.00	02/08/24	AETNA	E	ERROR	 Edit
162.00	02/14/24	AETNA	E	ACK_PENDING	
205.00	02/14/24	AETNA	E	ACK_PENDING	
162.00	02/21/24	AETNA	E	ACK_PENDING	
140.00	02/21/24	AETNA	E	ACK_PENDING	
205.00	02/22/24	AETNA	E	ACK_PENDING	
205.00	02/26/24	AETNA	E	ACK_PENDING	

18

Here are the different statuses you may see and the description. The ones in GREEN are the most common ones seen.

Status	Short Description	Long Description
ACK_DENIED	Denied Manually	The transaction was denied manually by a user.
ACK_MANUAL	Acknowledged Manually	The transaction was acknowledged manually by a user.
ACK_FINAL	Acknowledged By Payer	Final acknowledgment has been received from payer.
ARCHIVED	Archived	The transaction has been archived.
CREATED	Created	The transaction has been created.
CROSSOVER	Crossover Claim	The secondary claim was forwarded from the previous payer.
DELETED	Deleted	The transaction has been deleted.
DENIED	Denied	The payer has denied the transaction on a remittance advice.
ERROR	Validation Failed	The transaction has errors that must be corrected before it can be released and sent to the payer.
FOLLOW-UP	Follow-up	The transaction has been marked for follow-up.
HOLD	Hold	The transaction has been put on hold.
INFO	Informational	The transaction is informational only and will not be processed.
MODIFIED	Modified	The transaction has been modified.
PAID	Paid	The payer has paid the transaction. View remittance for additional information.
PRINTED	Printed	The transaction was printed.
PROCESSING	Processing	The transaction has been locked by the clearinghouse for processing.

Status	Short Description	Long Description
QUEUED	Queued For Transmission	The transaction has been queued for transmission to the payer. See "Claim Transmissions to Payers and Batch Schedule" on page 220. Once claims are batched, they are then submitted to the payer.
REJ_HOST	Rejected By Host	Clearinghouse has rejected the transaction.
REJ_MANUAL	Rejected Manually	Claim was rejected manually by the user.
REJ_PAYER	Rejected By Payer	The payer has rejected the transaction.
RELEASED	Released	The transaction is ready to be processed by the clearinghouse. NOTE: If the claim is to be printed onsite it will stay in released status until printed.
TRANSMIT	Sent To Payer	The transaction has been sent to the payer.
UNDELETED	Undeleted	The transaction has been undeleted.
UNHOLD	Released Hold	The transaction hold has been removed.
UNINFO	Removed Informational Status	The transaction informational only status has been removed.
UNKNOWN	Unknown	Transaction status is in an unknown state.
VALIDATED	Validation Success	The transaction has been validated.

20

The red header indicates there is an error that needs to be corrected before Inovalon releases this claim to the payor. On the right, you will be able to see the errors and clicking on the errors will open a box and display and explain the errors in more detail.

The screenshot shows a claim form with a red banner at the top stating "it must be corrected". An orange arrow points to this banner. Below the banner, the form displays patient demographics and assignment information. On the right side, there is a panel titled "Errors (1)" with a red header. An orange circle highlights the error message "CCI Mutually Exclusive", and an orange arrow points to it. Below the error list is a button labeled "Historical Errors".

3a. DOB	3b. Gender	8. Marital Status
C	M	
Race	8. Employment	

10d. RESERVED	ASSIGNMENT	MEDIA
	-- Unassigned --	E

21

Error message detail "According to NCCI this code combination is considered mutually exclusive and should not be billed together." This means that we need to take a look and fix the CPT/Service/HCPT codes on this claim

The screenshot shows a dialog box with the following information:

ID / Severity	77 / ERROR
Name	CCI Mutually Exclusive
Date Applied	04/25/24 16:48:02
Override Note	

Below the table is a green button labeled "Override Message".

Message

According to NCCI this code combination is considered mutually exclusive and should not be billed together.

Related Fields

Service Line HCPC	99205
Service Line HCPC	90833
Service Line HCPC	96127

At the bottom of the dialog box are buttons for "Prev", "Next", and "Close".

22

We do recommend you fix these issues in ICANotes, reprep and resubmit from ICANotes so that it doesn't continue to happen with future claims. You do however have to option of fixing these claims, saving and validating them here

Tools

Name CCI Mutually Exclusive

Date Applied 04/25/24 16:48:02

Override Note

✓ Override Message

Message

According to NCCI this code combination is considered mutually exclusive and should not be billed together.

Related Fields

Service Line HCPC	99205
Service Line HCPC	90833
Service Line HCPC	96127

Prev Next Close

10. RELATED CAUSES

c. OTHER

Never Verified Check Now

Profiler

23

You can click the left or right arrow to navigate to the next/previous claim

Settings System Training

Viewing 1 of 649

Historical Errors

Check Status Save & Validate

ut is pending a final acknowledgement

.00	02/15/2024 - 02/15/2024	A - AETNA (E)	ACK_PENDING	1
-----	-------------------------	---------------	-------------	---

Patient Demographics

3a. DOB	3b. Gender	8. Marital Status
	F	
Race	8. Employment	

10d. RESERVED	ASSIGNMENT	MEDIA
	-- Unassigned --	E

24

Clicking the middle pad will navigate you back to the previous area to your worklist of claims.

Viewing 2 of 649

Check Status Save & Validate

it must be corrected

DIFIERS	E. DIAG	F. CHARGES	G. UNITS	H. EPSDT	Action
	A	200.00	1		» «
	A	102.00	1		» «
	A	16.00	1		» «
		\$318.00	3		

Enable Tools Add Service Line Service Line Delete Manager

3. TOTAL CHARGE 29. PATIENT PAID 30. BALANCE DUE

118.00

33. BILLING PROVIDER

Facility Physician

Messages Events Related

Errors (1)

CCI Mutually Exclusive

Historical Errors

25

Click here to individually select claims that you want to delete from your worklist. Or you can click the main box to select all claims. Its at your discretion if you want to clean up your worklist as you reprep claims.

Professional Claims

Quick Search ▾ Profiler

Create Claim Release Valid

☐	Create Date	Create Mode	Patient Control Number	Patient Name	Total Charge	Fr
☐	04/25/24 16:48:00	IMPORT	10013445522	SMITH, SHIRLEY	102.00	00
☐	04/25/24 16:48:01	IMPORT			318.00	00
☐	04/25/24 16:48:29	IMPORT			162.00	00
☐	04/25/24 16:48:29	IMPORT			205.00	00
☐	04/25/24 16:48:57	IMPORT			162.00	00
☐	04/25/24 16:49:03	IMPORT			140.00	00
☐	04/25/24 16:49:05	IMPORT			205.00	00
☐	04/25/24 16:49:26	IMPORT			205.00	00
☐	04/25/24 16:49:47	IMPORT			162.00	00
☐	04/25/24 16:50:04	IMPORT			162.00	00

26

Any deleted claims can be undeleted at any time. Otherwise you can always refilter claims by create date which will indicate when a specific claim was submitted. Just Click "More Options ▼"

Settings ▼ System ▼ Training ▼

(1) Rows Selected - [Deselect All](#) | [Select Max](#) | Range: 1 Year ▼

Release Validate Print **More Options ▼** Reload Grid Update Columns Export Wizard

Autofix
Create Audits
Create Appeals
Delete
Modify
Move To Test
Undelete
Check Status

Total Charge	From Date	Payer Name	Status	Action
162.00	02/14/24	AETNA	ACK_PENDING	
318.00	02/08/24	AETNA	ERROR	
162.00	02/14/24	AETNA	ACK_PENDING	
205.00	02/14/24	AETNA	ACK_PENDING	
162.00	02/21/24	AETNA	ACK_PENDING	
140.00	02/21/24	AETNA	ACK_PENDING	
205.00	02/22/24	AETNA	ACK_PENDING	
205.00	02/26/24	AETNA	ACK_PENDING	

Page 1 of 8

27

or you can always search undeleted claims (and more) in profiler

Create Claim Release Validate Print **More Options ▼** Re

Patient Control Number	Patient Name	Total Charge	From Date	Payer Name	Media
160134433323	SMITH, JANE	162.00	02/14/24	AETNA	E
		318.00	02/08/24	AETNA	E
		162.00	02/14/24	AETNA	E
		205.00	02/14/24	AETNA	E
		162.00	02/21/24	AETNA	E
		140.00	02/21/24	AETNA	E
		205.00	02/22/24	AETNA	E
		205.00	02/26/24	AETNA	E
		162.00	02/29/24	AETNA	E
		162.00	03/04/24	AETNA	E

Current Profile Settings
Profile is currently cleared.

Profiler

28 Click " Deleted" to filter and then apply- repeat step 26

 Save

Profile is currently cleared.

Filters Sorting

Filters

	Events	Status
Created	☐ Today	☐ Work Queue
	☐ Batches Choose (0)	☐ Error
	☐ Files Choose (0)	☐ Released
	☐ Range	☐ Created
	☐ Date Within	☐ Queued
	☐ Date Before	☐ Deleted
Modified 	☐ Today	☐ Crossover
	☐ Date Range	☐ Acknowledged
	☐ Date Within	☐ Ack Pending
	☐ Date Before	☐ Paid
	☐ By User Choose (0)	☐ Denied
		☐ Transmit
	☐ Validated	
	☐ Hold	
	☐ Modified	
	☐ Informational	
	☐ Secondary Hold	
	☐ Rejected	
	☐ Printed	
	☐ Not Paid	
	☐ Follow-up	

29 Correcting Errors Prior to Claim Submission

Correct Errors Prior to Claim Submission

If you select a claim that is in error status, the message "This claim has errors that must be corrected" appears at the top of the claim page. Also, the Messages tab appears with a link to the field with the error (Figure 6).

Dashboard Patients Claims Collections Reporting Settings System Support

Institutional Claim

Quick Search Apply Ignore Profile Filters

Patient Account Number: Patient Name: Payer ID: Payer Name:

Contract/defined list of account numbers - Unit T: Unit First (Payer name is optional): Contract/defined list of ICD numbers:

Transaction: Print: Copy: View: Tools:

Claim Summary 18/04

 This claim has errors that must be corrected

Messages Events Related

Errors (0)

[Incorrect/Invalid Payer](#)

[Invalid Payer ID](#)

[Invalid Payer Name](#)

30

You have the option to fix this claim (we recommend you do so in ICANotes) or Remove Override

Name	Billing Provider Not On File				
Date Applied	03/07/21 20:28:41				
Overridden By					
Override Date	08/24/21 14:42:16				
Override Note					
 Remove Override					
Message IF The Billing Provider Name is entered THEN The Billing Provider ID does not match an ID in the entities table					
Related Fields <table><tr><td>Billing Provider Name</td><td>DEMO MEDICAL CENTER</td></tr><tr><td>Billing Provider EIN</td><td>422383412</td></tr></table>  Keep Changes		Billing Provider Name	DEMO MEDICAL CENTER	Billing Provider EIN	422383412
Billing Provider Name	DEMO MEDICAL CENTER				
Billing Provider EIN	422383412				

31 Keep Changes Option

Click **Keep Changes** to save your changes.

Rule Details	
Rule ID	84
Requested By	- demo admin - Cole Aden - Joe Becker - Hari Dantuluri
Payers	Medicare Iowa (IA)
Rule Groups	- Core Edits
Status	LIVE
Description	Billing provider must be entered in entities table
Transaction Types	- Institutional Claim - Professional Claim
Last Updated	04/30/21 22:18:03

32

Action	Description
Keep Changes	Save any changes you have entered in this dialog box
Prev	Return to the previously error.
Next	Continue to the next error. If you are displaying the last error, the first error will re-appear.
Close	Close error message dialog box.

NOTE: When the message box is open, no other fields on the claim are available to you.

After fixing all errors, go to the Transaction tab and select either Save & Validate or Save and then validate the audit (Figure 9).

Institutional Claim

Quick Search [Apply] Ignore Profiler Filters

Patient Account Number: _____ Patient Name: _____ Payer IDN: _____
 Comma delimited list of account numbers - Limit 7 Last,First (First name is optional) Comma del

Transaction | Print | Copy | View | Tools

Save & Validate
 Validate
 Save
 Hold
 Delete
 Mark As Informational
 Mark As Followup

This claim has errors that must be corrected

WALTER GRINSTEIN \$1994.00 131

2 PAY-TO PROVIDER

6998 ADMIRAL BLVD E