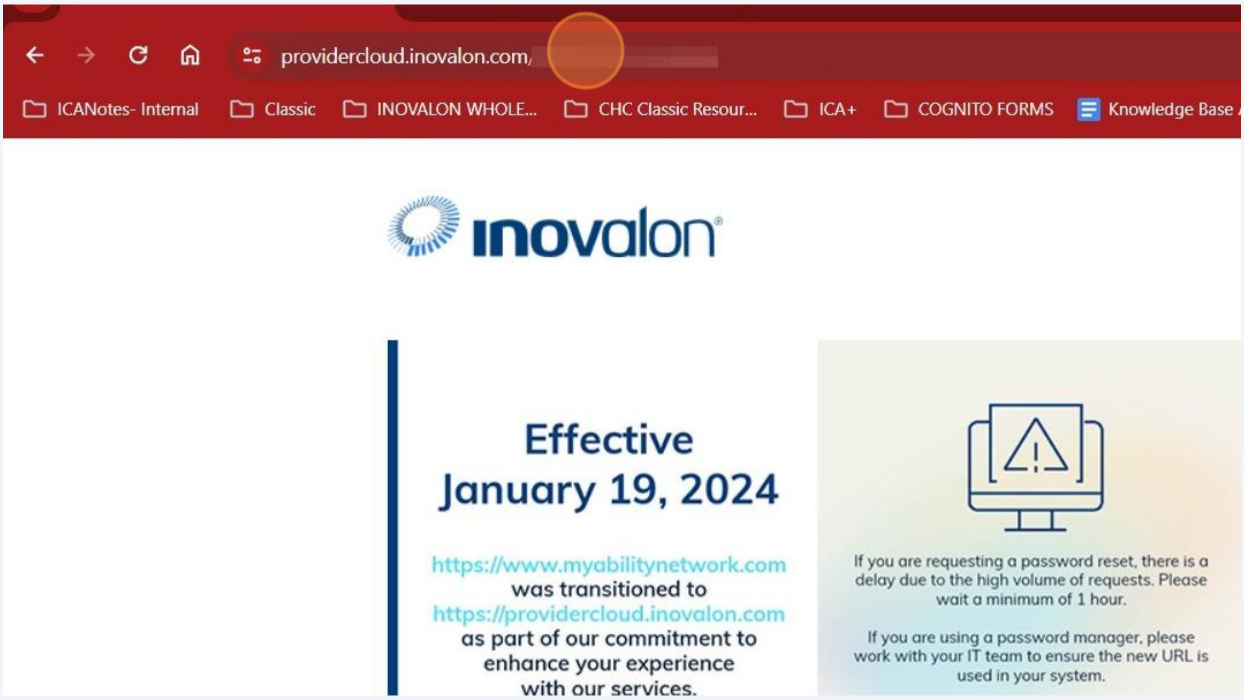
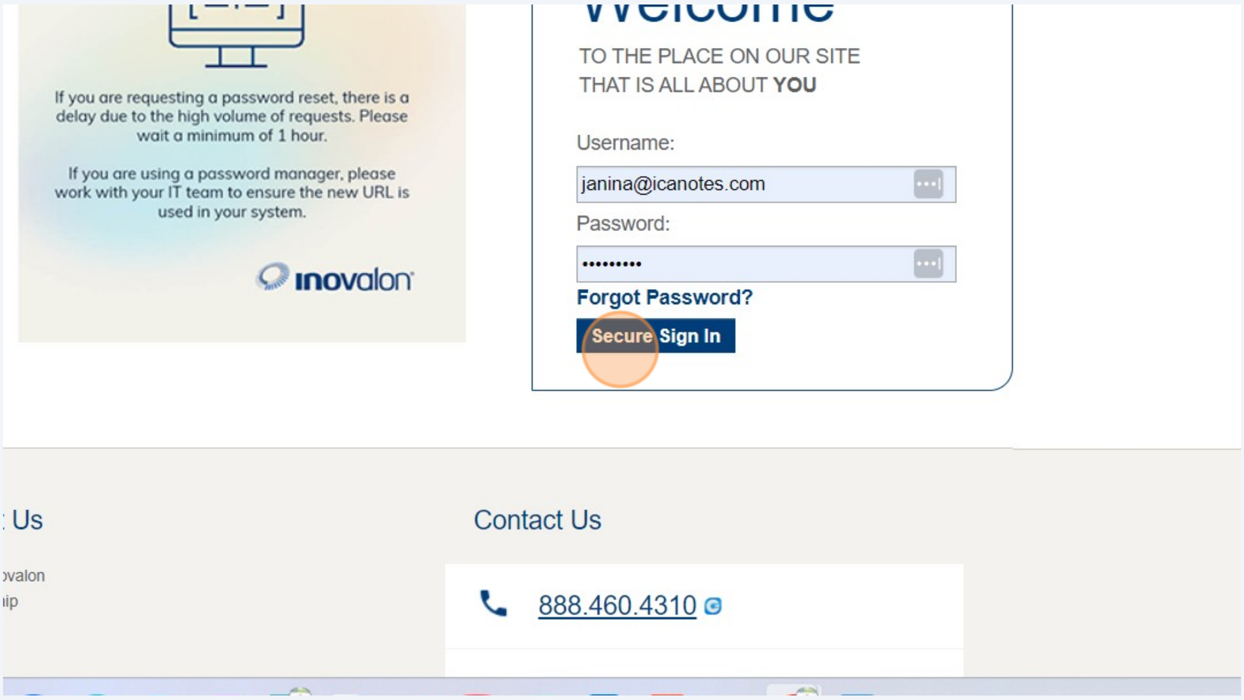
ICANotes Guide To Managing Claims In Your Inovalon Portal~

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.

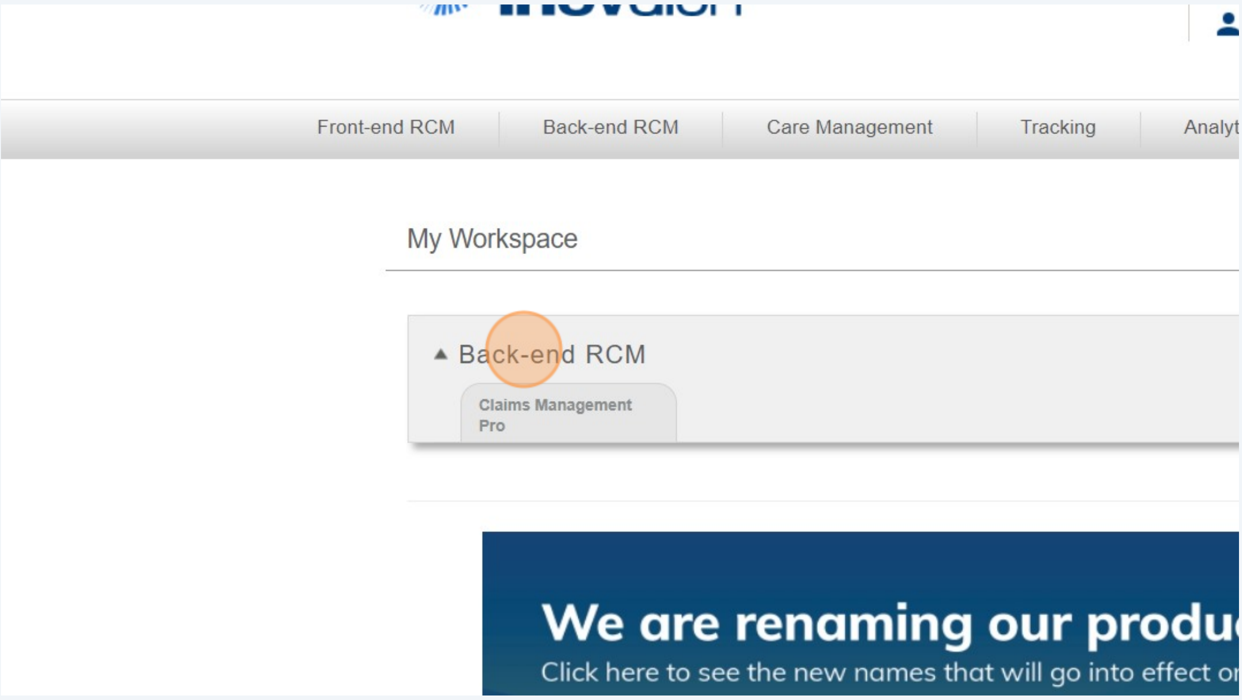
1 Go to your Provider Log in Page www.providercloud.inovalon.com



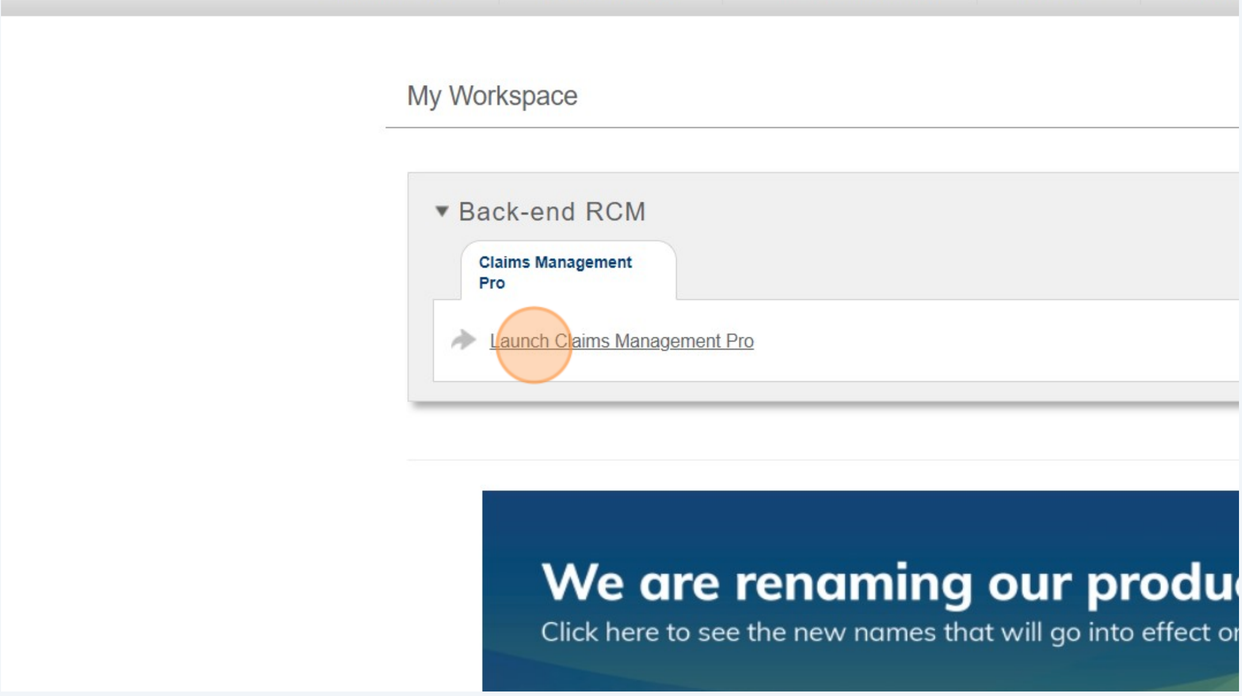
2 Click "Secure Sign In"



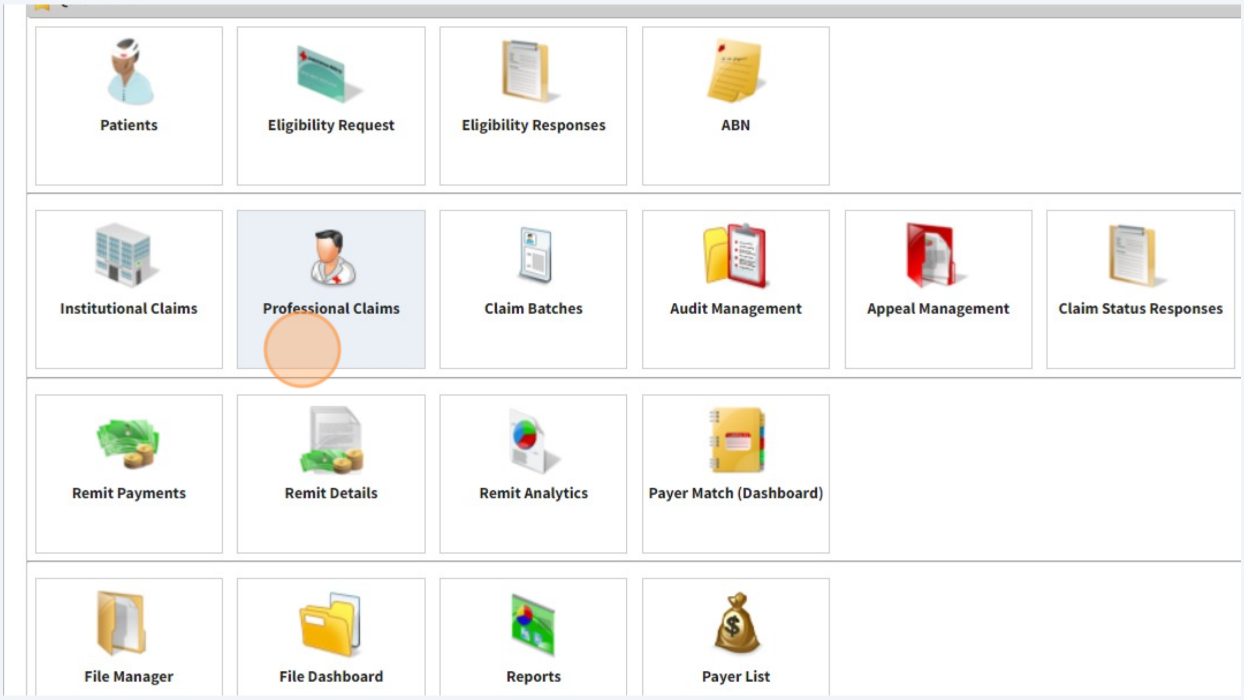
3 Click "Back-end RCM"



4 Click "Launch Claims Management Pro"



5 Click " Professional Claims "



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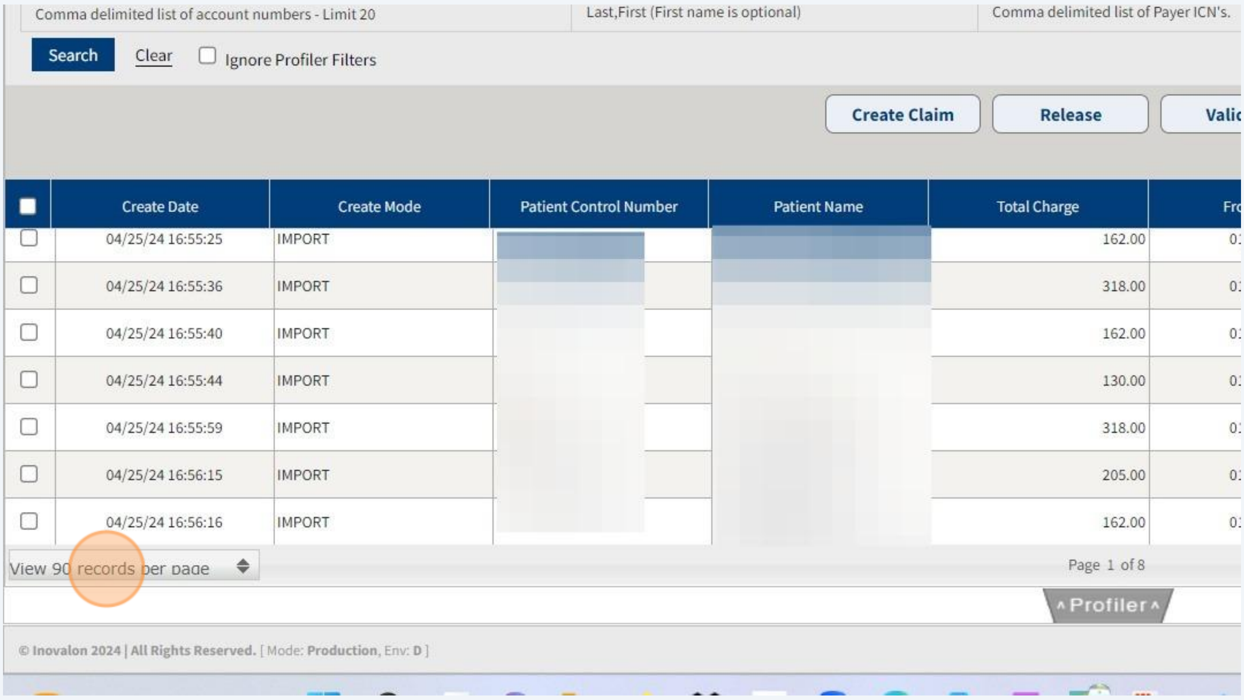
Click "View 15 records per page" to modify how many claims you want to see per page. You can select up to 90 claims per page.



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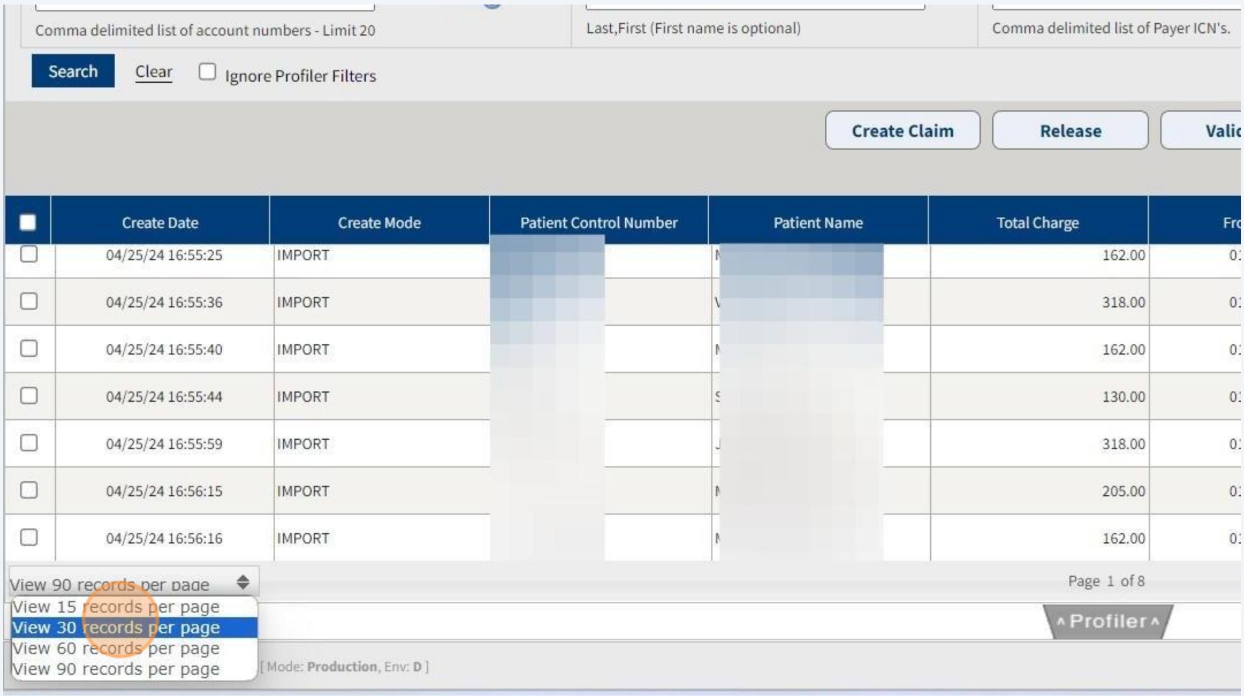
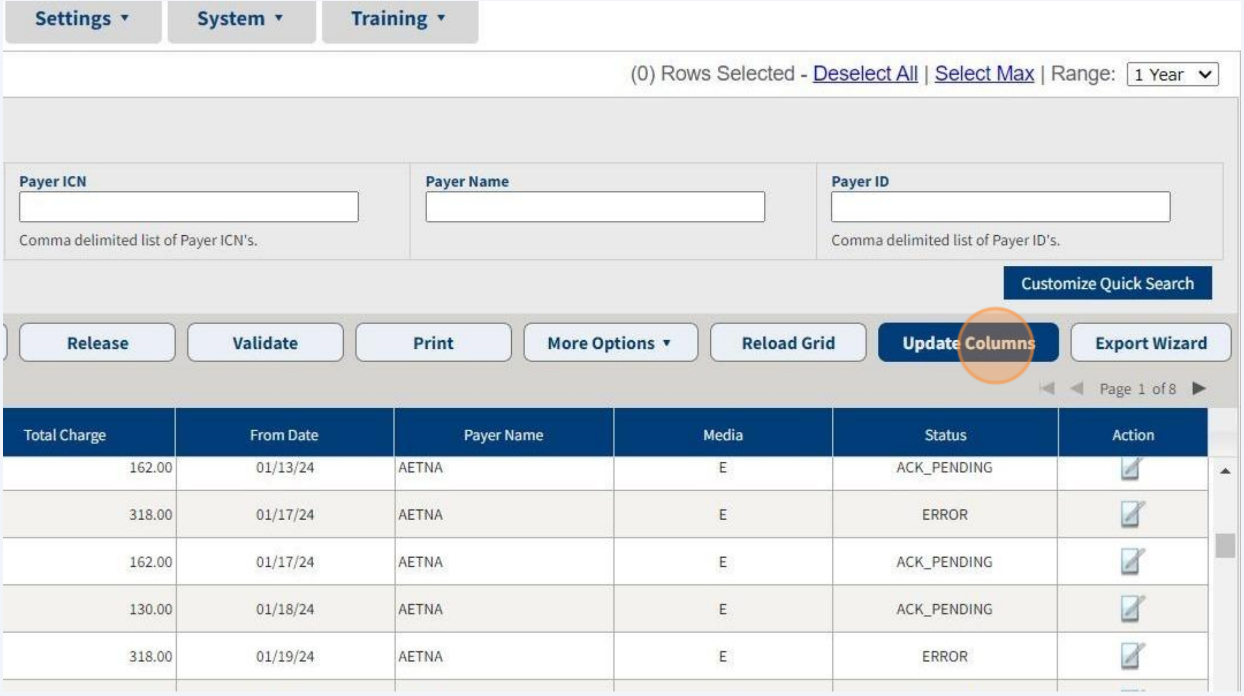
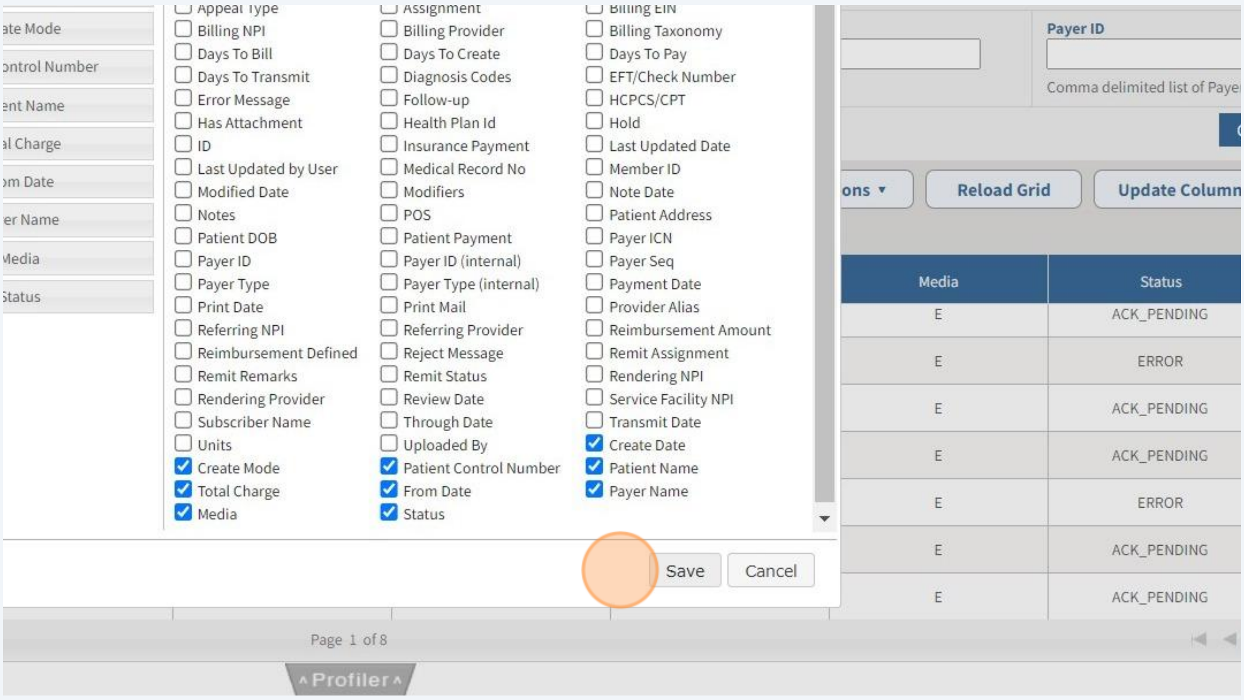
Click "Slide Open"



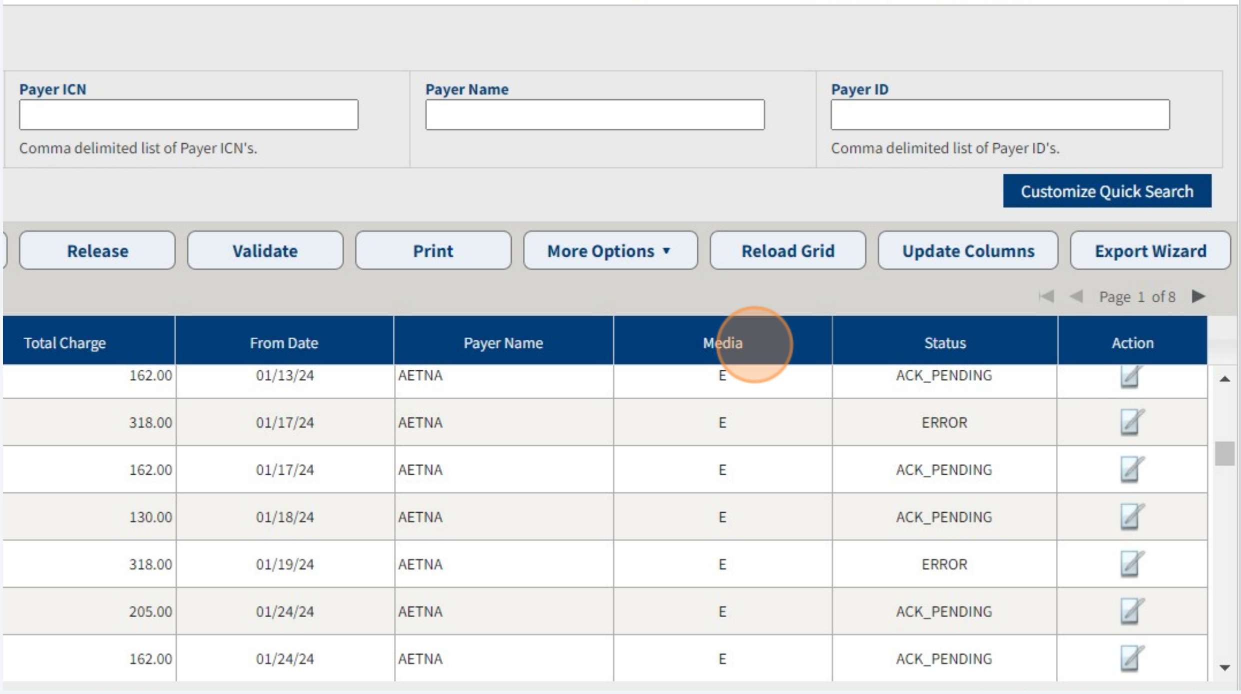
8 Click "Update Columns" if you want to customize the information columns



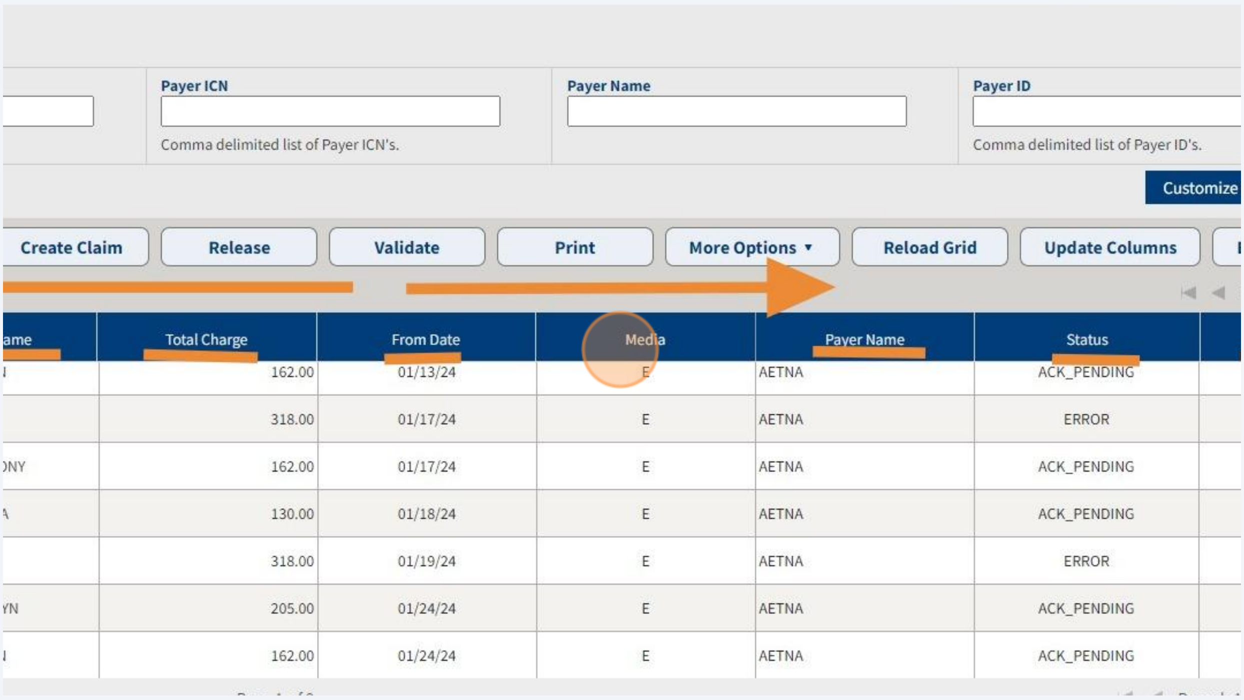
9 You can enable/disable options at your discretion. Click Save



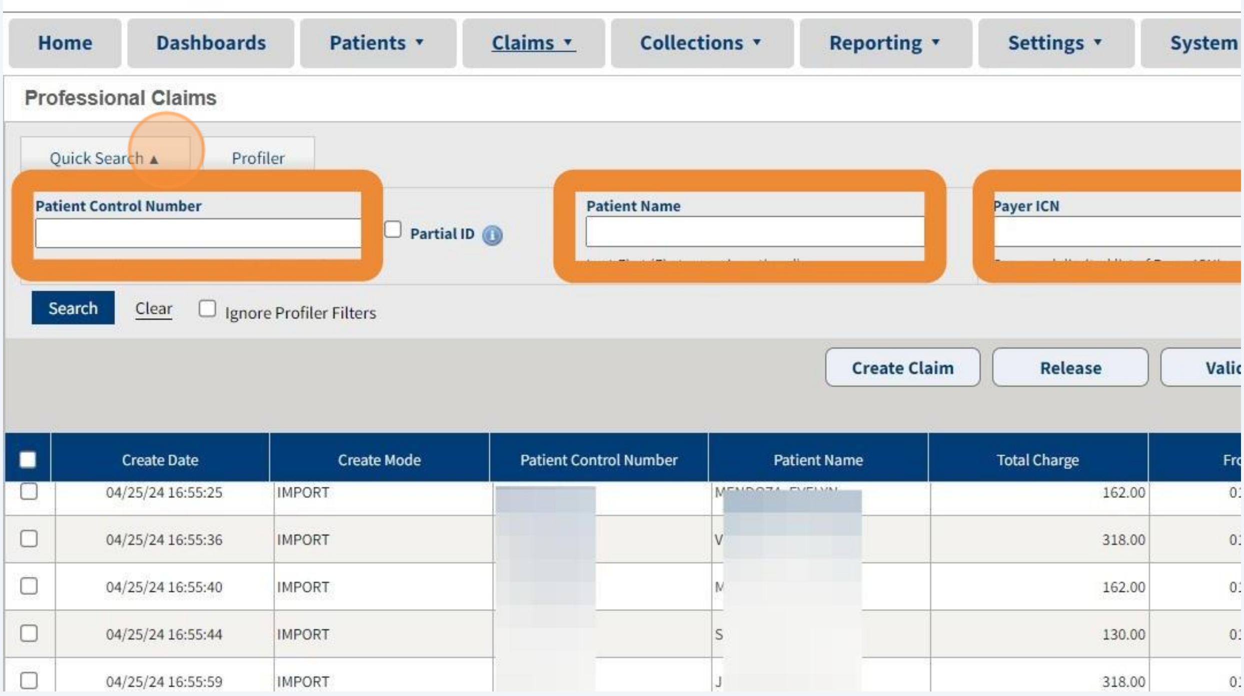
10 Saved options will be your default options. You can update these at anytime.



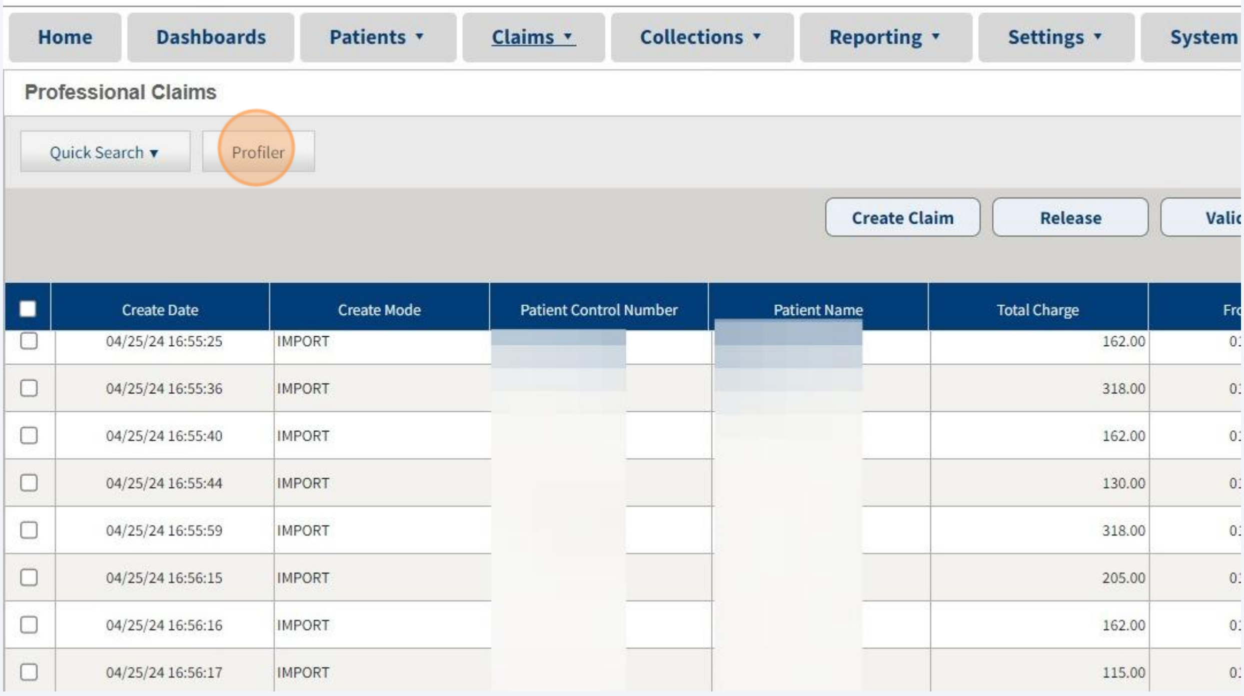
11 Feel free to drag these tabs left to right to reorganize columns to your liking. Additionally, clicking on a specific column will filter that specific column by least to greatest or vice versa as well as in alphabetical order.



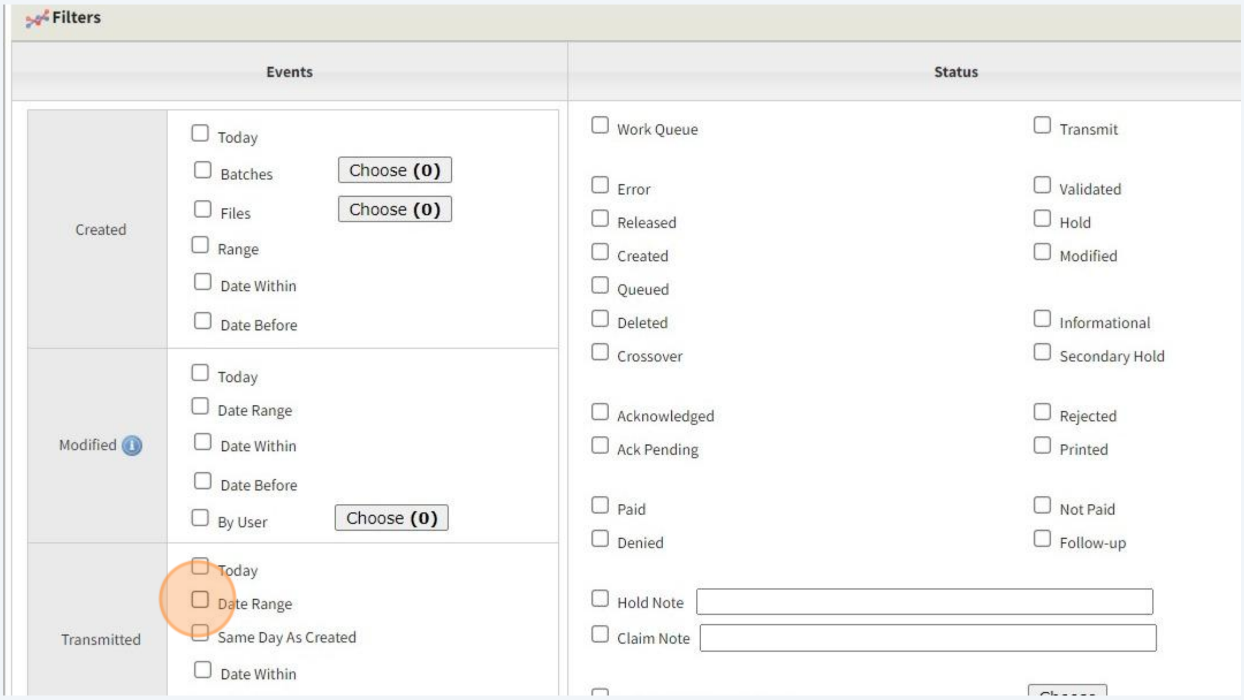
12 Click Quick Search to activate quick search options of submitted claims.



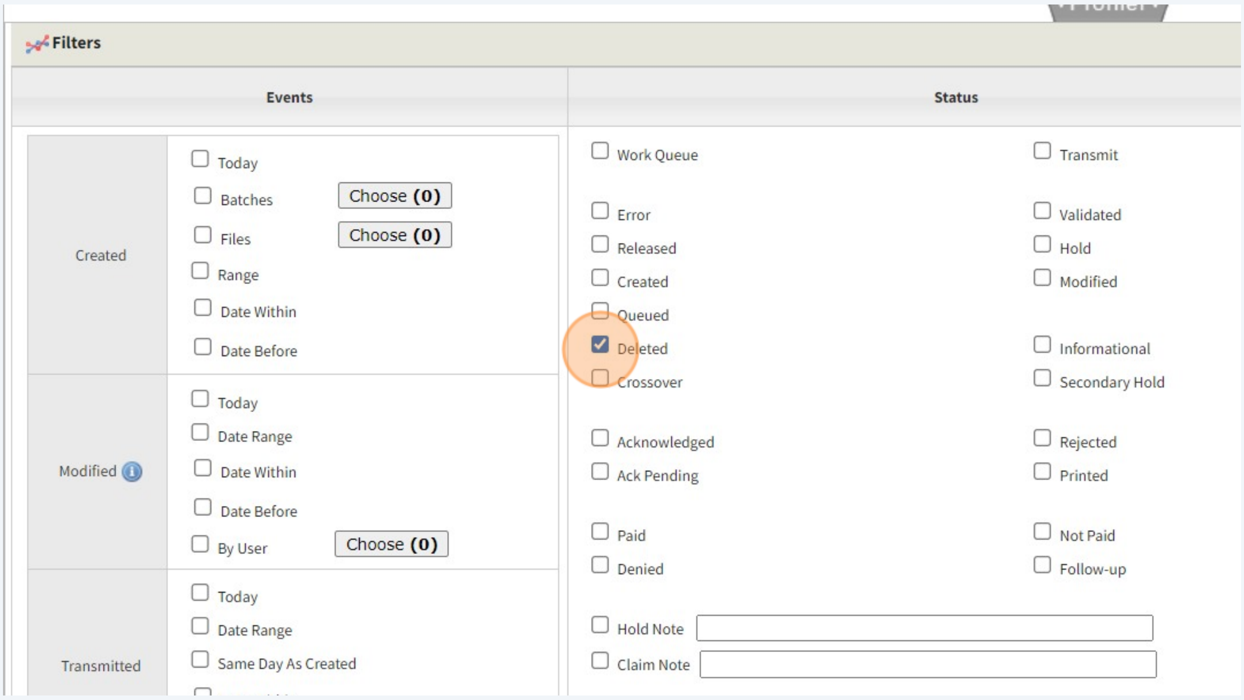
13 Click "Profiler" to open more specific filtering option for claim search options



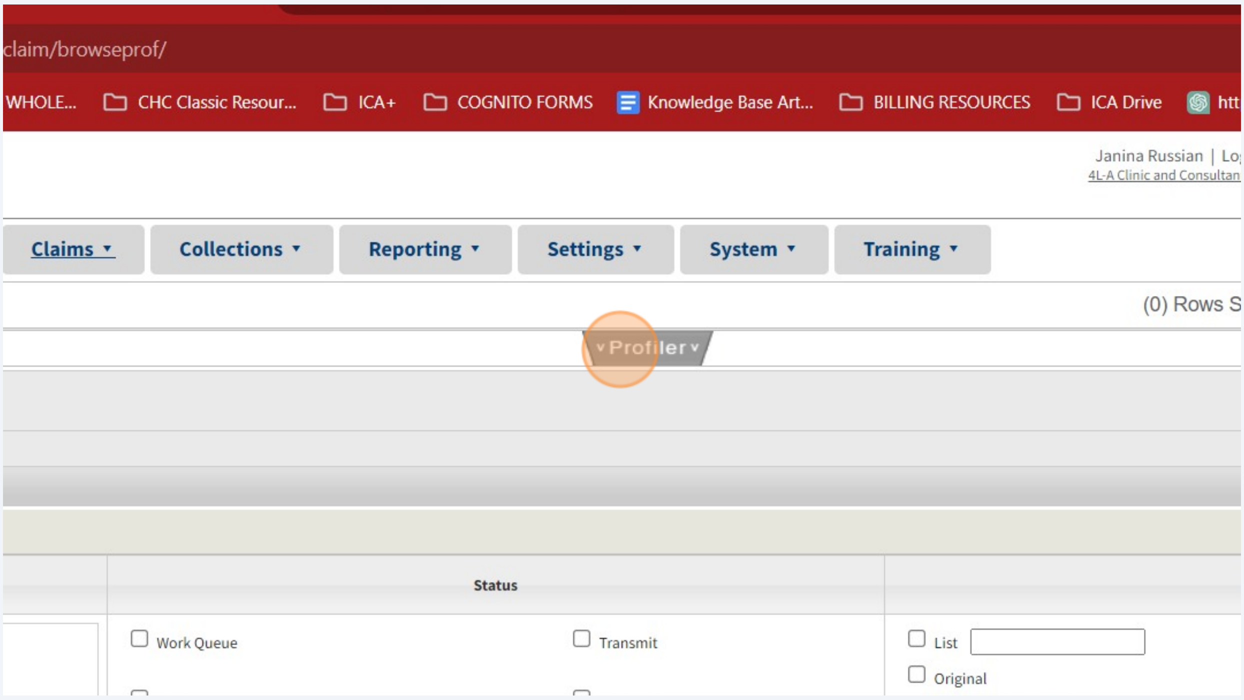
14 Click on one or more options ranging from dates to status types.



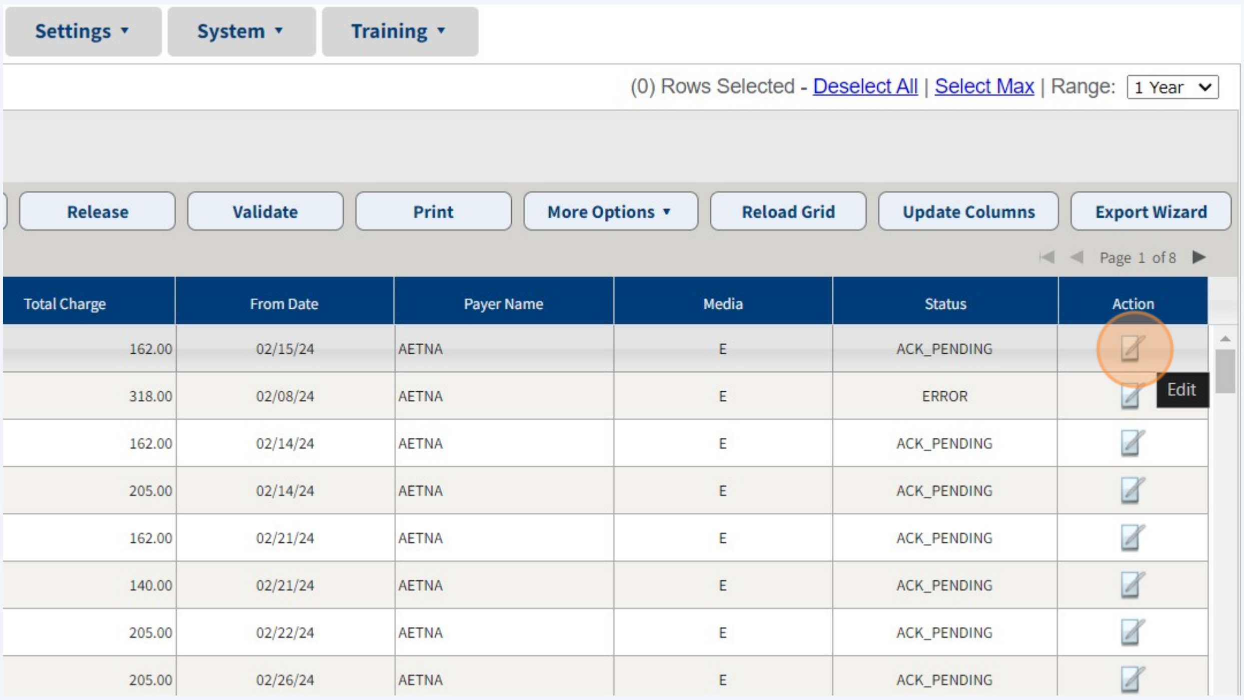
15 You can always undelete deleted claims from your worklist as an option. Then click Apply



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



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.



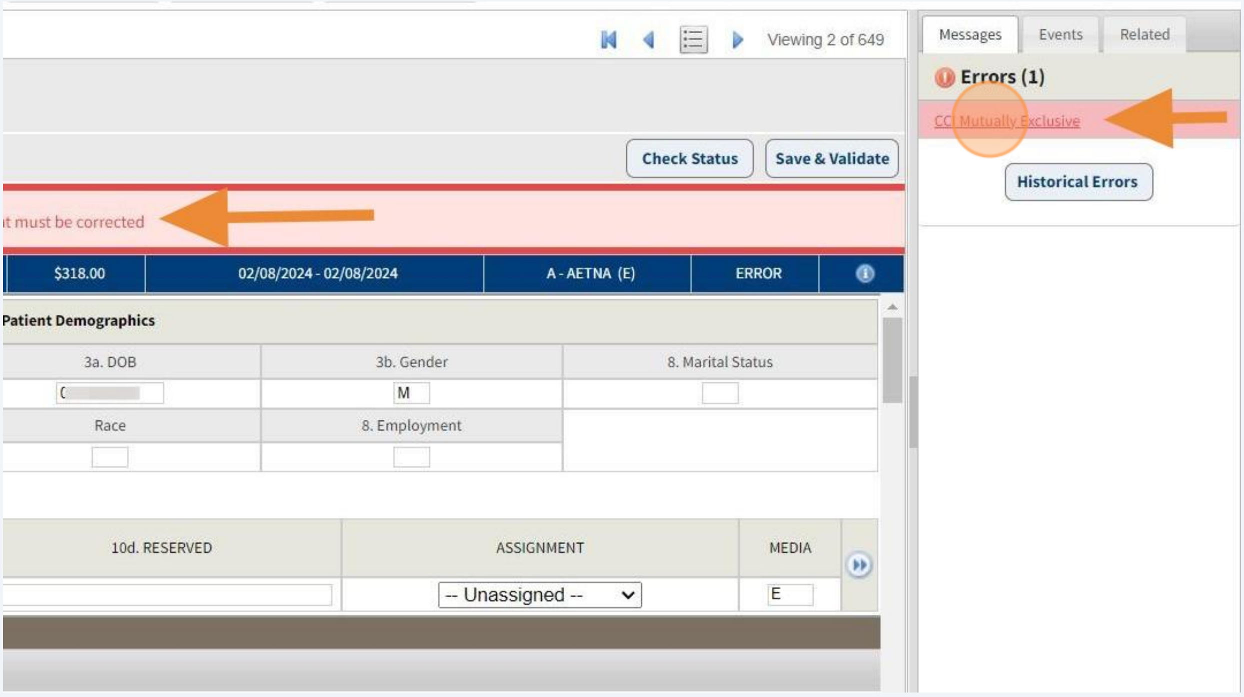
18 Here are the different statuses you may see and the description. The ones in GREEN are the most common ones seen.

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.

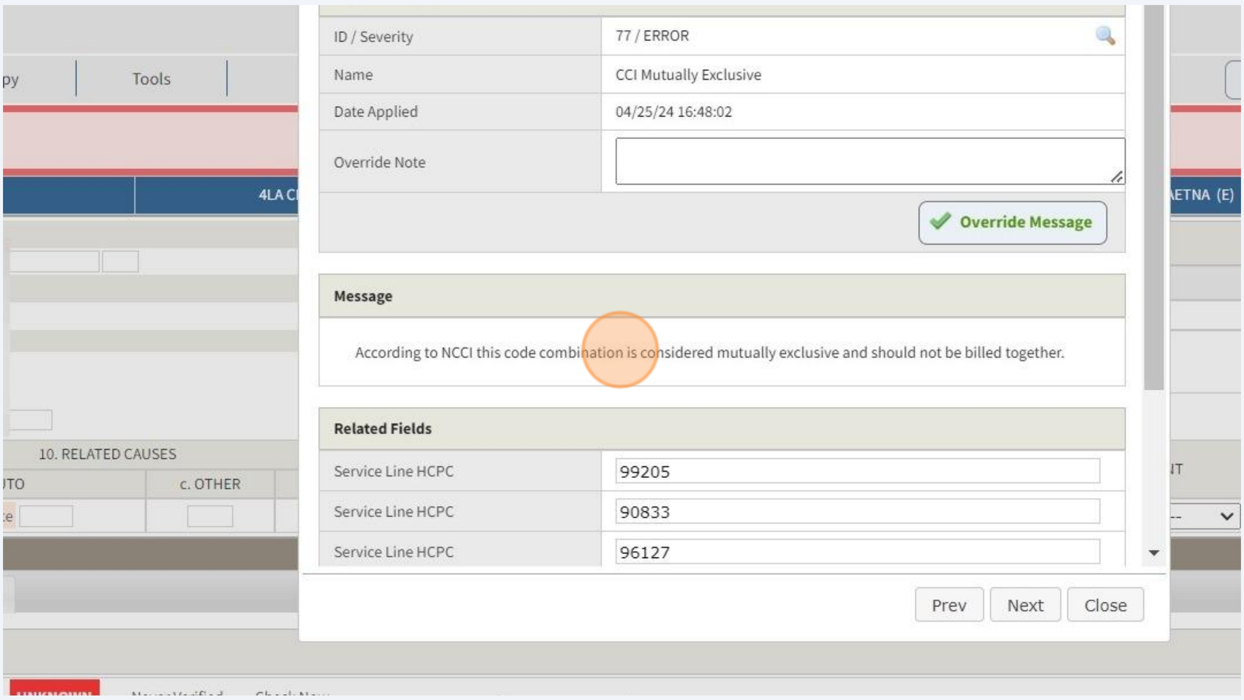
19

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.

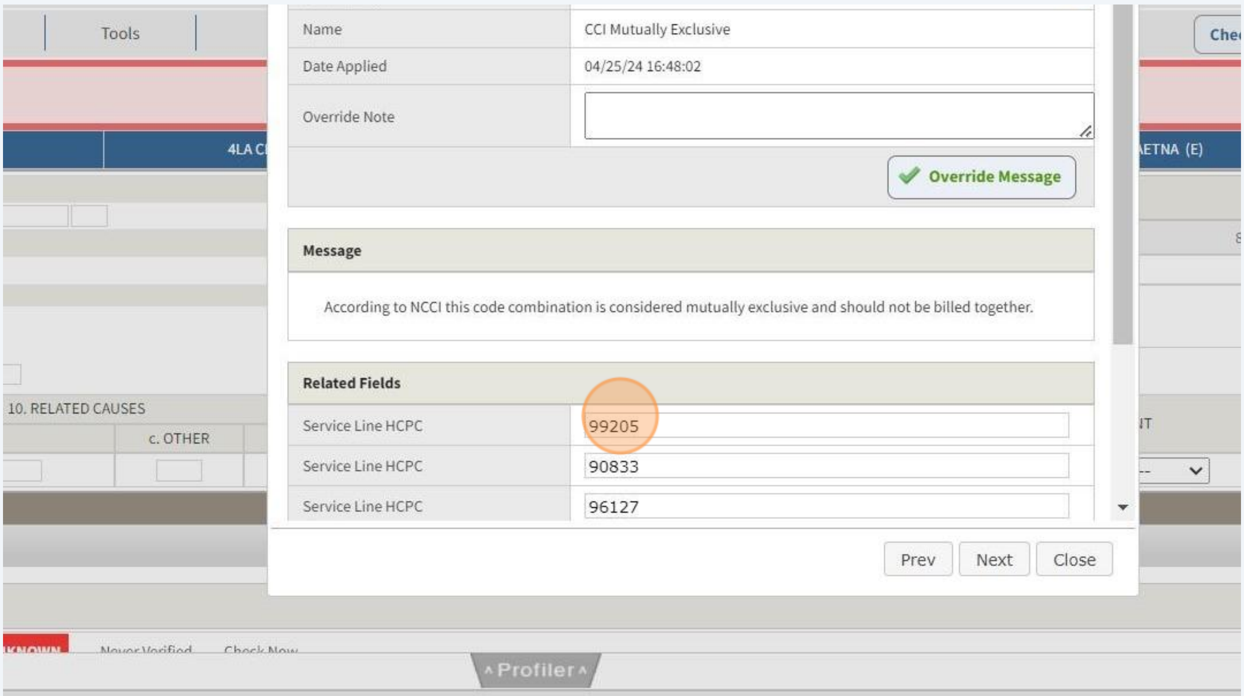
20 The red header indicates there is an error that needs to be corrected before Inovalon releases this claim to the payor. On the right, you will be able to see the errors and clicking on the errors will open a box and display and explain the errors in more detail.



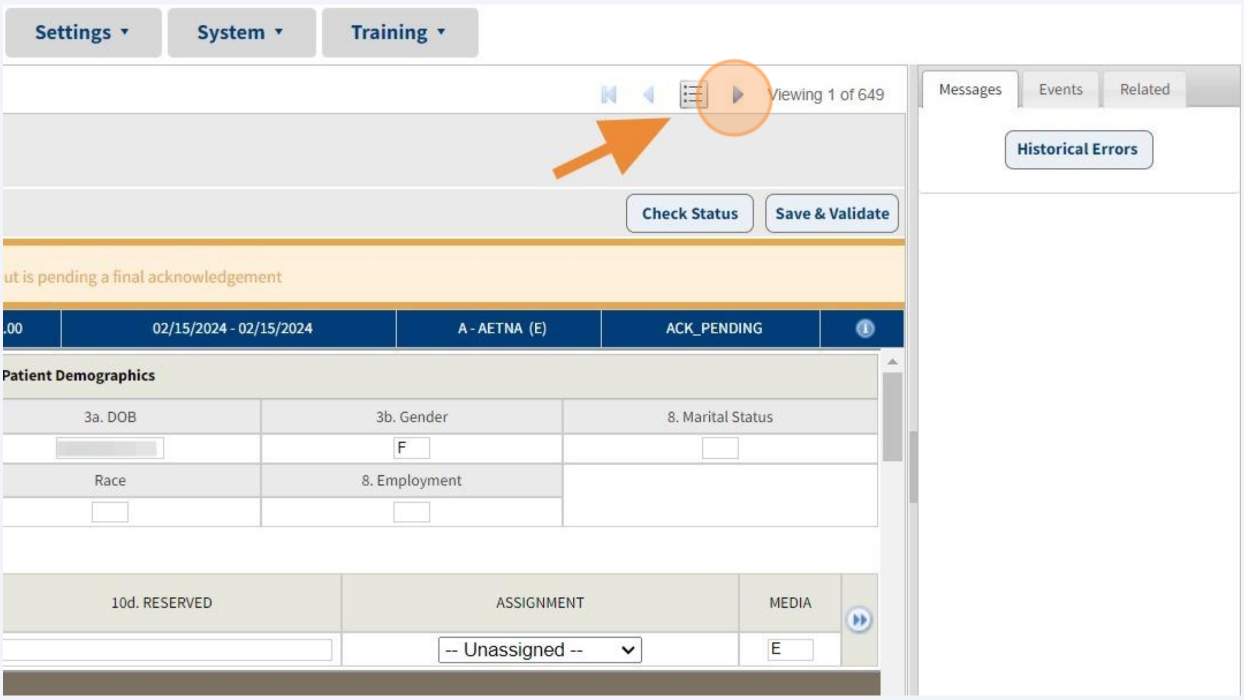
21 Error message detail "According to NCCI this code combination is considered mutually exclusive and should not be billed together." This means that we need to take a look and fix the CPT/Service/HCPT codes on this claim



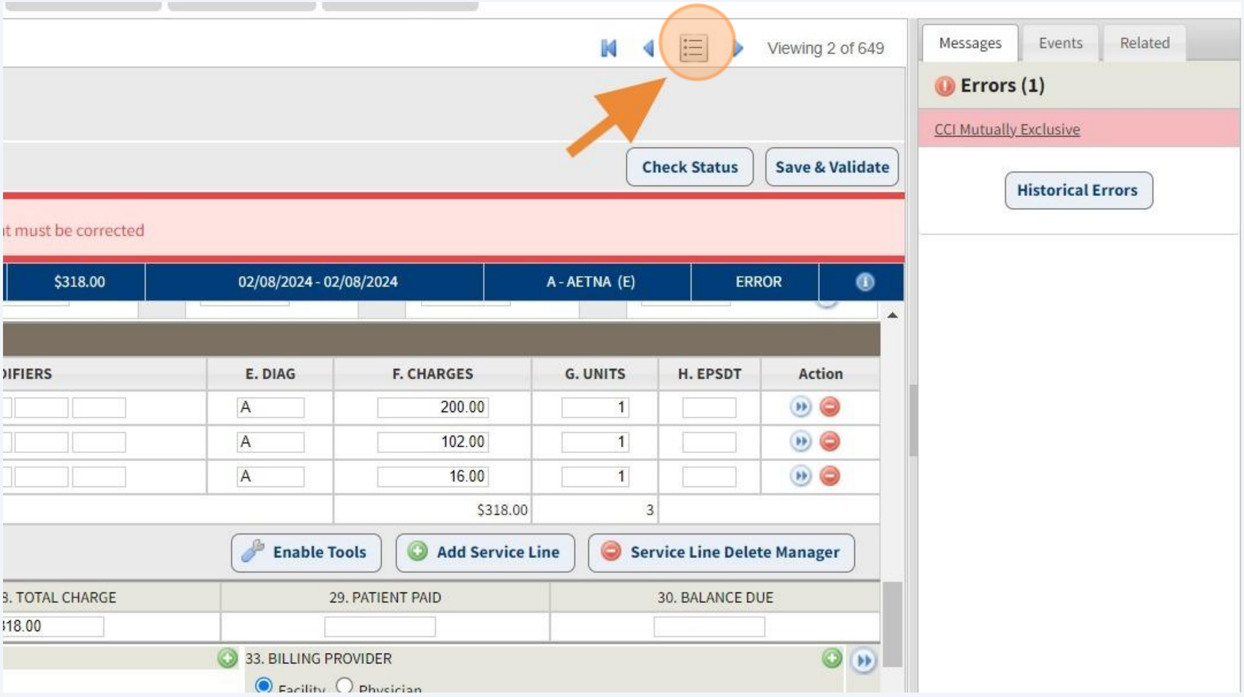
22 We do recommend you fix these issues in ICANotes, reprep and resubmit from ICANotes so that it doesn't continue to happen with future claims. You do however have to option of fixing these claims, saving and validating them here



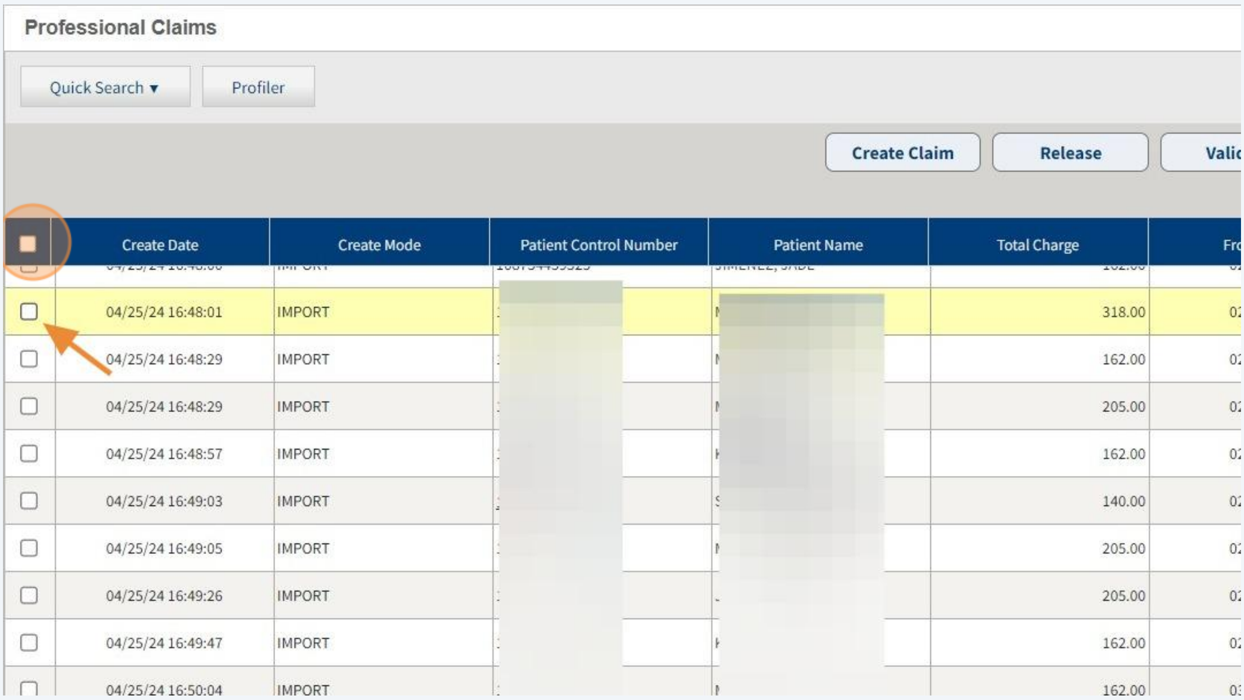
23 You can click the left or right arrow to navigate to the next/previous claim



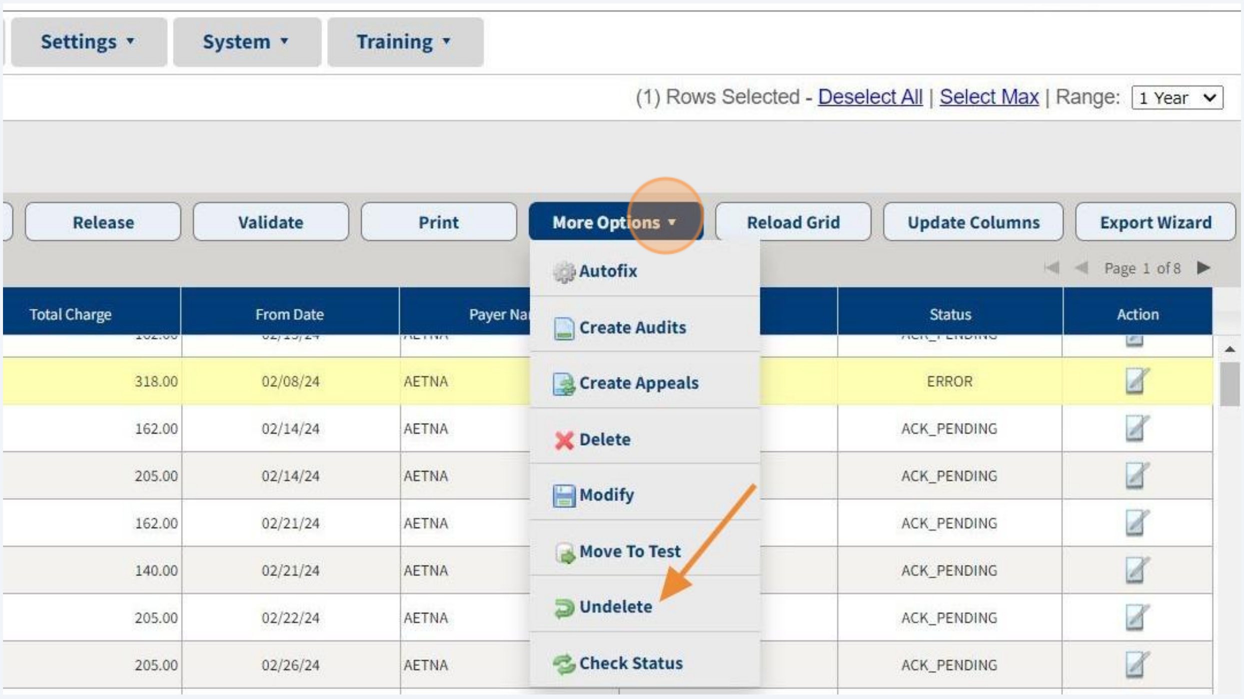
24 Clicking the middle pad will navigate you back to the previous area to your worklist of claims.



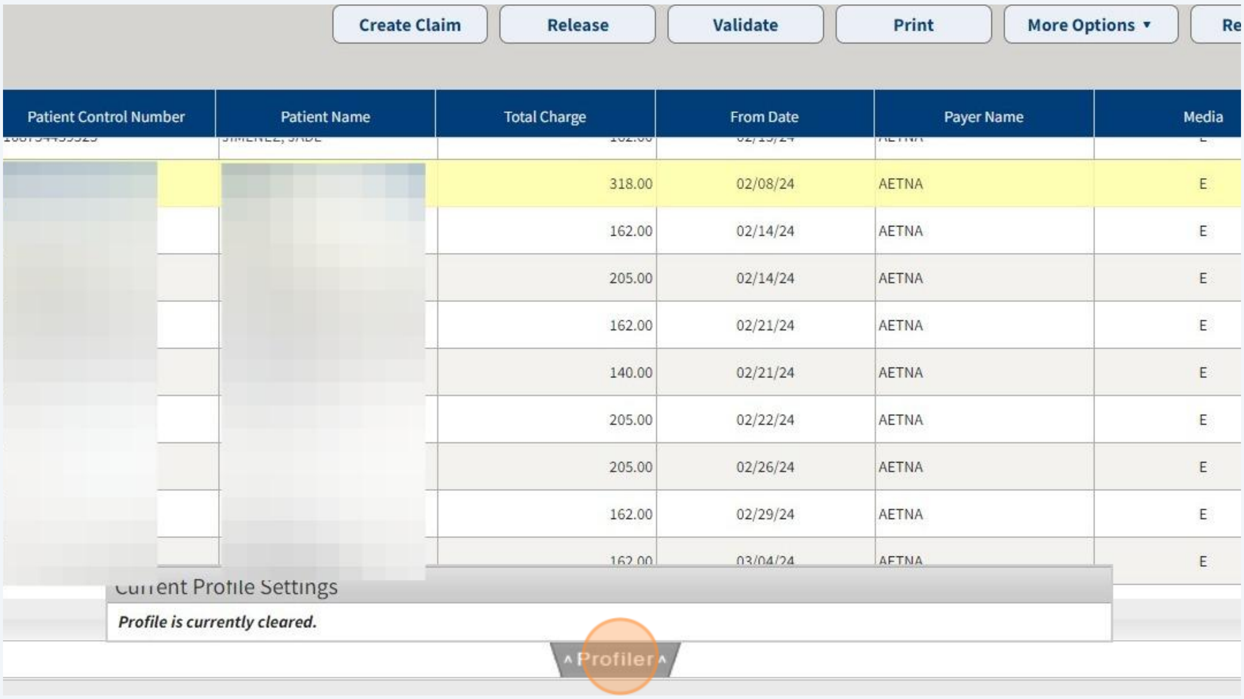
25 Click here to individually select claims that you want to delete from your worklist. Or you can click the main box to select all claims. Its at your discretion if you want to clean up your worklist as you reprep claims.



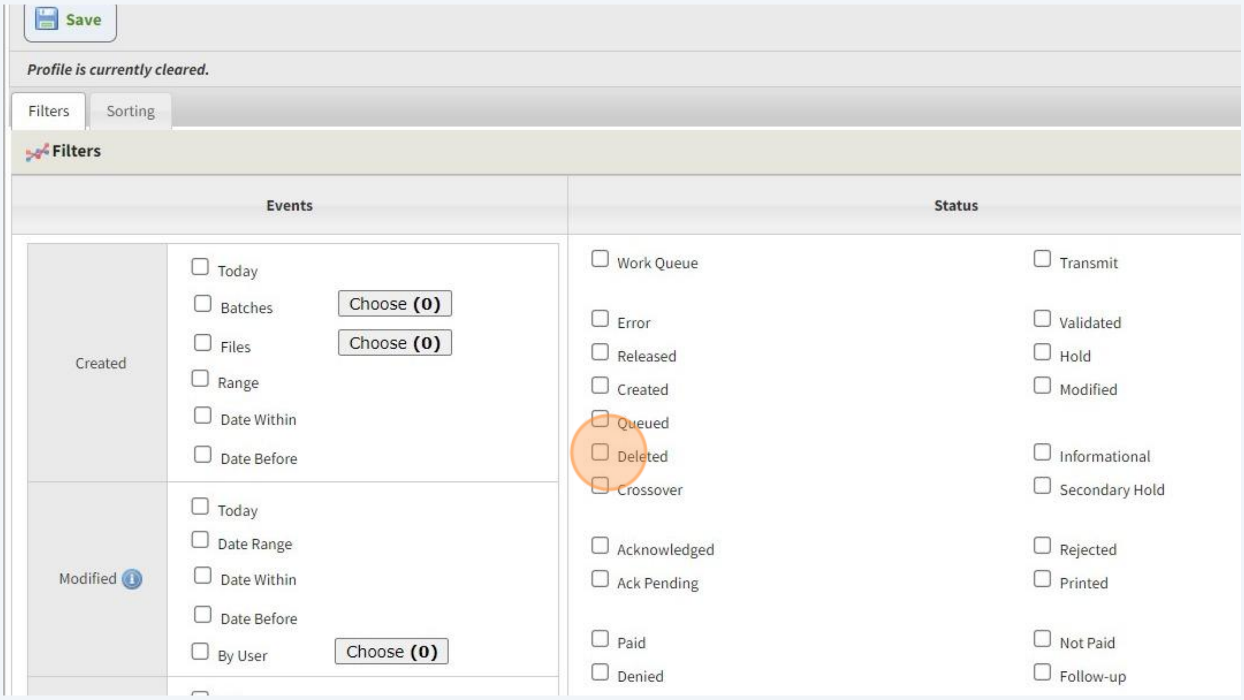
26 Any deleted claims can be undeleted at any time. Otherwise you can always refilter claims by create date which will indicate when a specific claim was submitted. Just Click "More Options ▾"



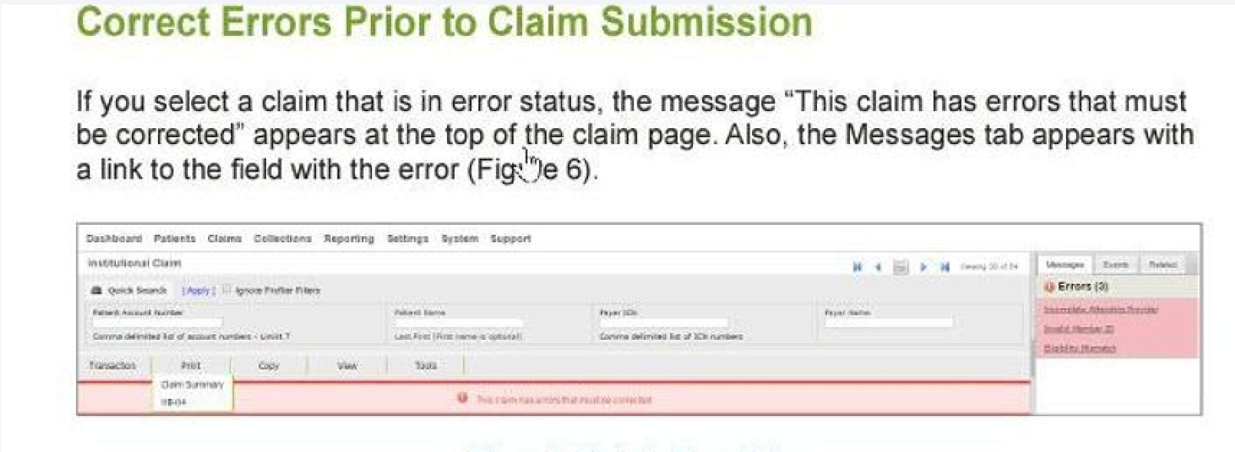
27 or you can always search undeleted claims (and more) in profiler



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



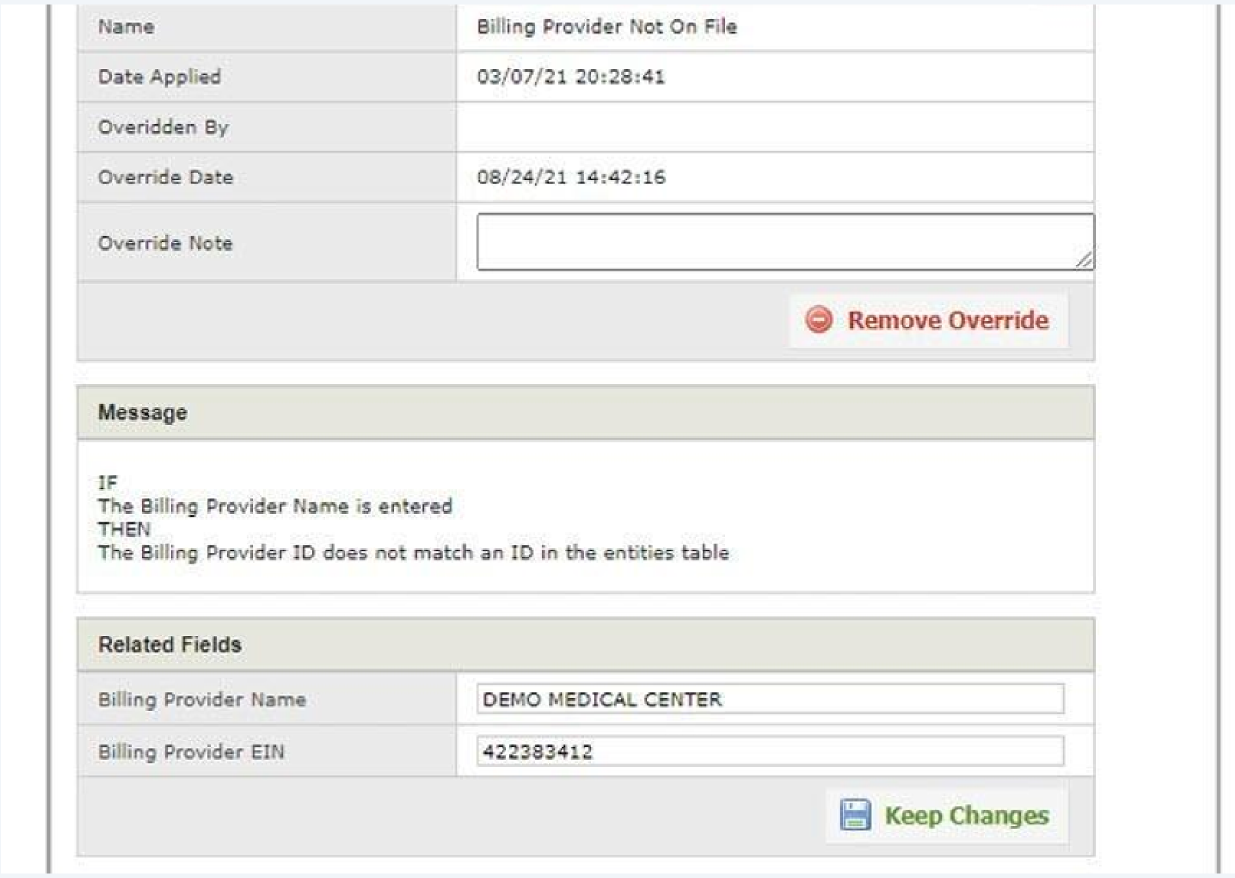
29 Correcting Errors Prior to Claim Submission



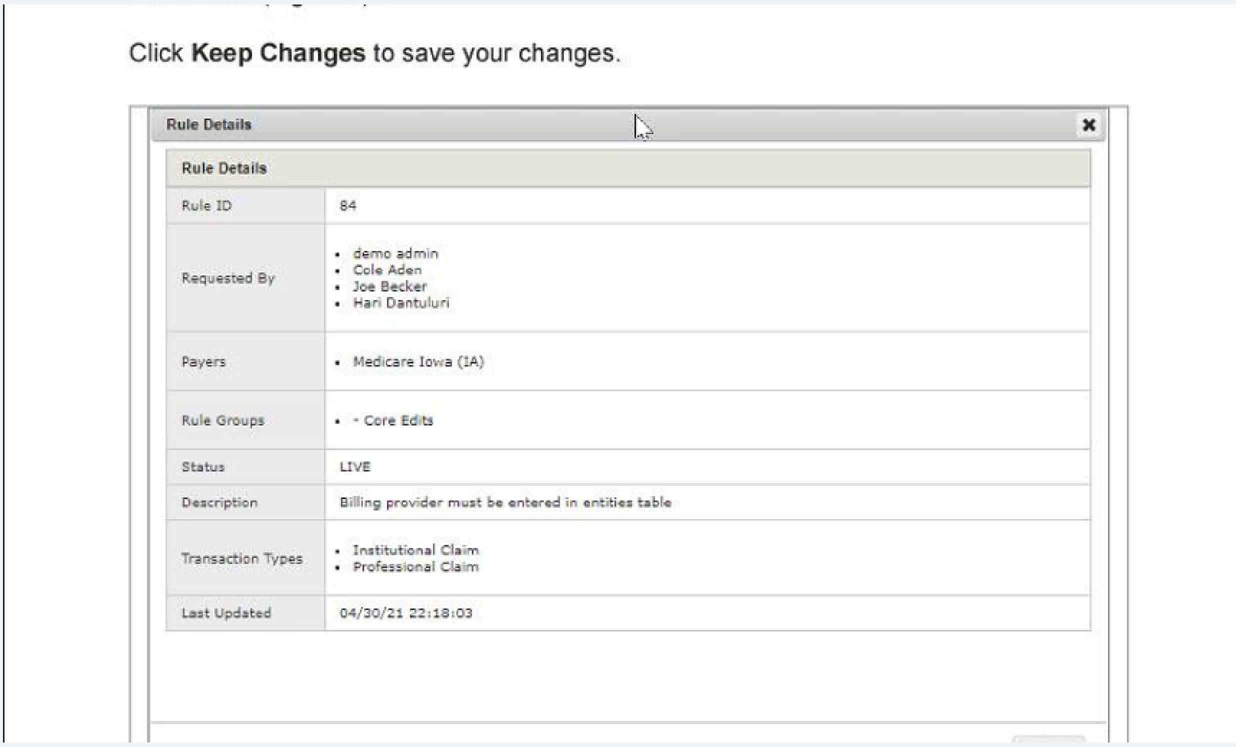
Correct Errors Prior to Claim Submission

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).

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



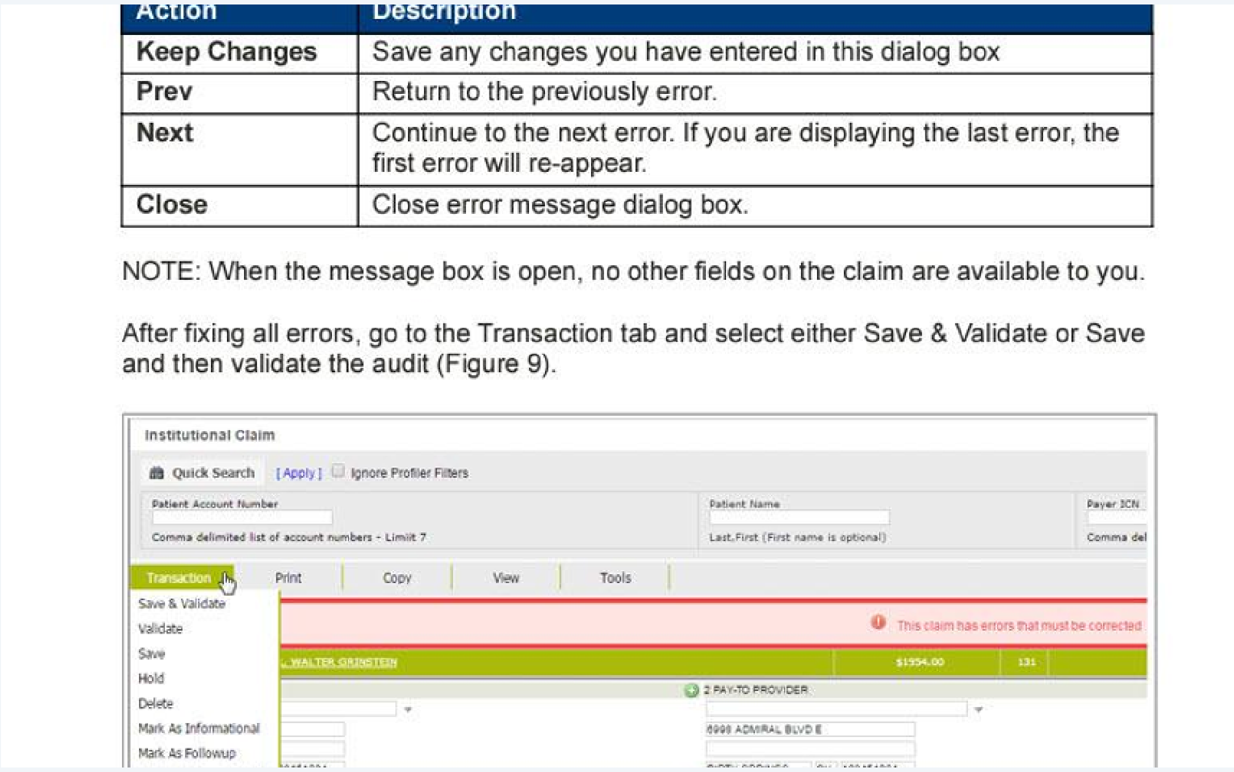
31 Keep Changes Option


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

Rule Details

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).