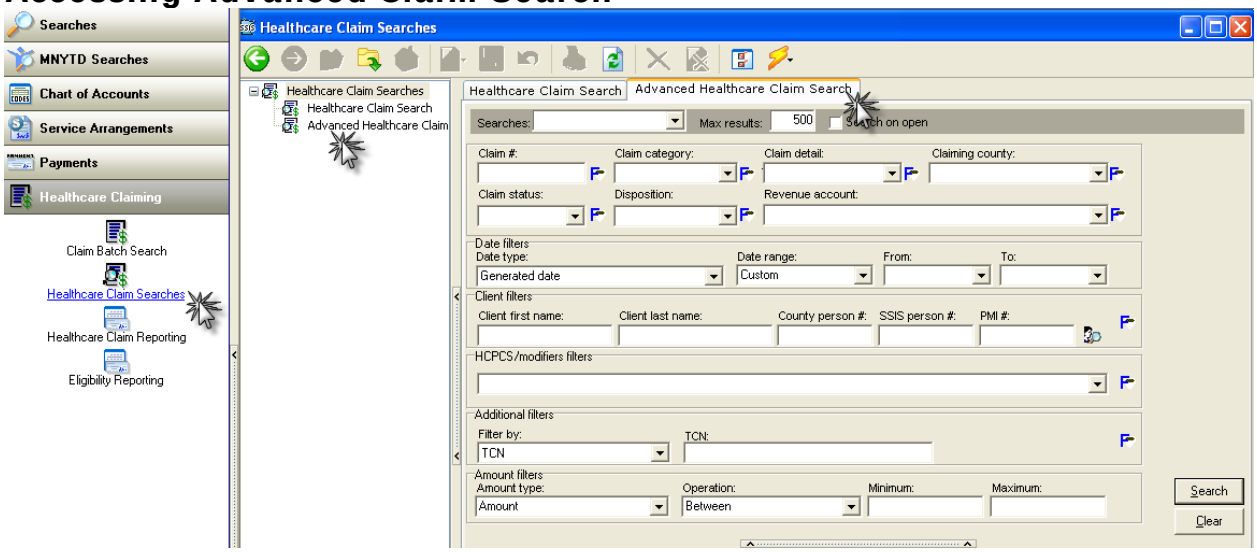
Advanced Claim Search

Accessing Advanced Claim Search



The Advanced Claim Search allows users to enter multiple values for a single field and contains a large set of fields on which to search. The Advanced Claim Search is used to search for specific claims.

Advanced Healthcare Claim Search utilizes Advanced Search Filters which allows for the selection of one, several, or all search filters when completing a search. In addition, the Healthcare Claim grid on the advanced search contains additional columns that can be displayed.

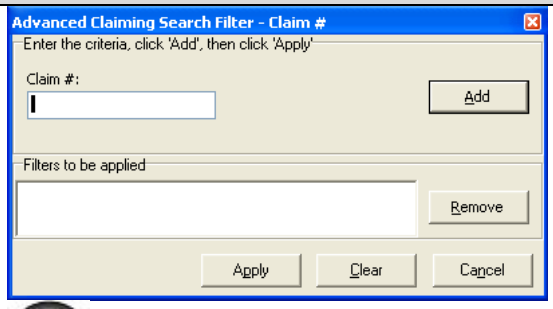
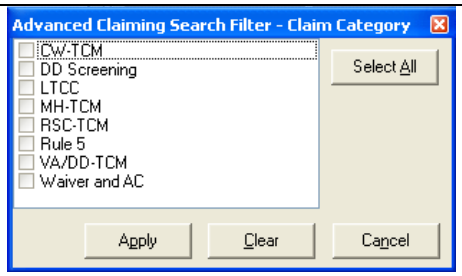
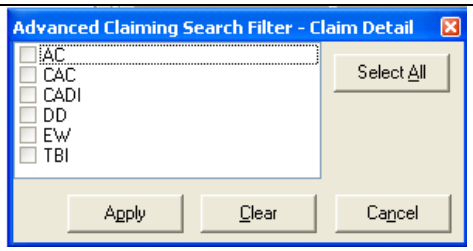
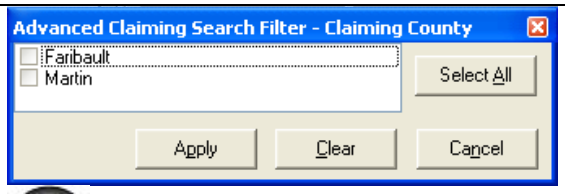
Hint: Advanced searches offer flexibility to customize a search or a report that can be utilized to gather data on a particular area of the application. These advanced searches can be used to run weekly, monthly, quarterly and even yearly reports to aide local social service agencies in tracking healthcare claims.

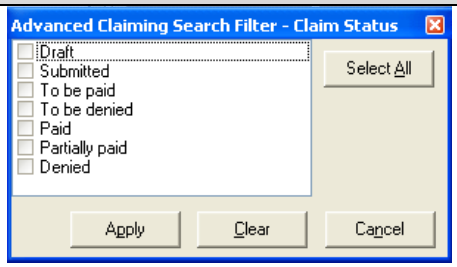
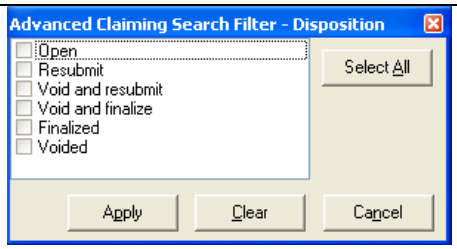
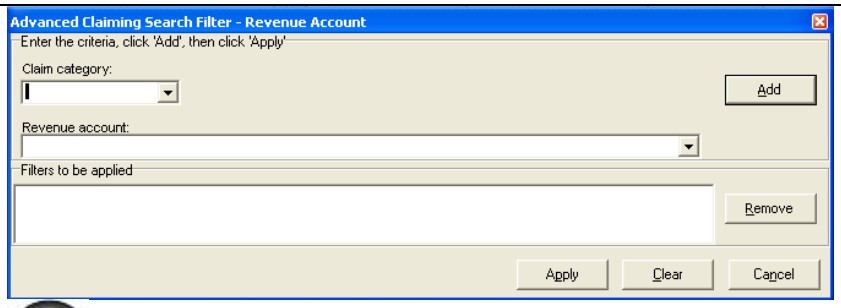
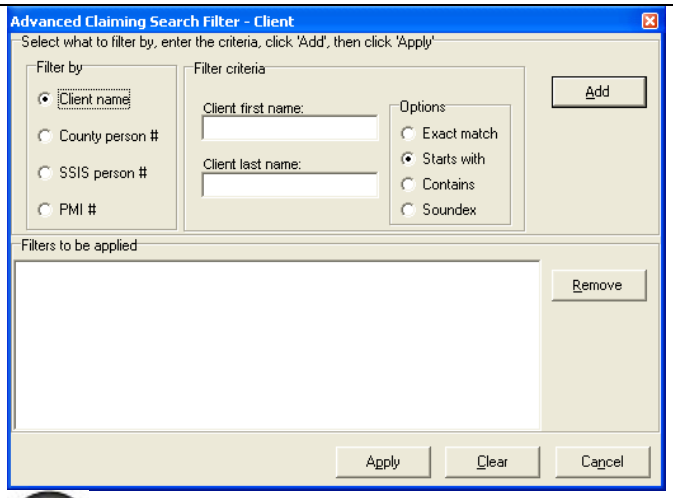
To Access the Advanced Claim Search:

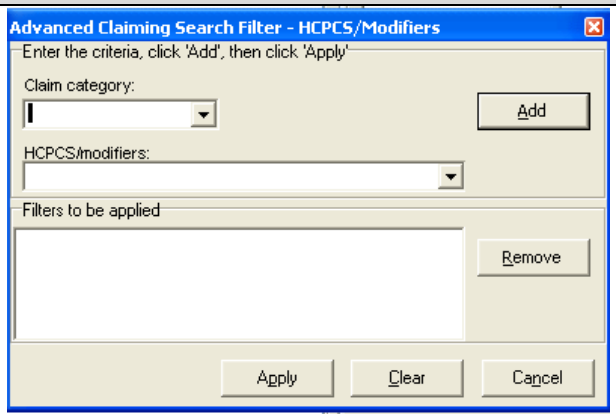
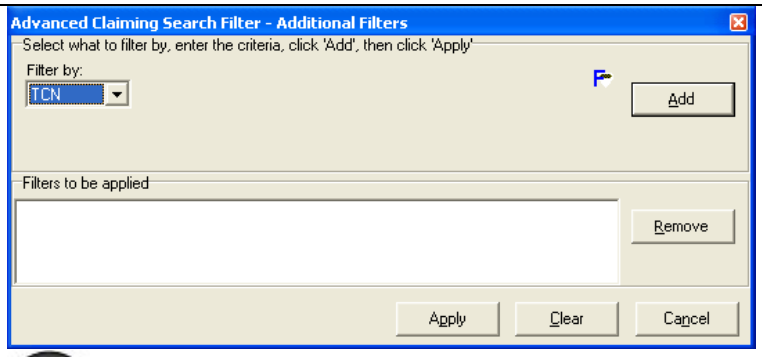
1. From the Task Panel select **Healthcare Claim Searches** from Healthcare Claiming
   OR
   Click **Searches/Logs** and select **Healthcare Claiming**>**Healthcare Claim Searches**.
2. Select **Advanced Healthcare Claim Search** tab or in the Tree View.
3. Select filter search criteria by using the Advanced Filter buttons .
4. Click **Search**.

Hint: In some of the Advanced Search filters a wild card search can be used. A wild card search allows the user to increase the search criteria by using the Asterisk (*) to replace the beginning or end of a search name. This search is useful if you are unsure of the spelling or need to look for an unusual spelling. The Advanced Search filters allowing for Asterisk (*) include:

- *Client filter – Client first name*
- *Client filter – Client last name*

Filter	Screenshot
Claim # Filter	 *Hint: You must enter a complete number. When a Claim number(s) is entered, all other search criteria are ignored.*
Claim Category Filter	
Claim Detail Filter	
Claiming County Filter	 *Hint: This filter only displays for agencies that share an SSIS database.*

Filter	Screenshot
Claim Status Filter	
Disposition Filter	
Revenue Account Filter	 *Hint: Revenue Accounts are agency specific. Your agency may not use Revenue Account codes.*
Client Filter	 *Hints:* • *Read the filter to be applied before clicking the Close button. This filter is not the person search.* • *If you enter the SSIS Person #, all other search criteria in the Client filter are ignored.*

Filter	Screenshot
HCPCS / modifiers Filter	
Additional filters	 *Hint: Additional filters include:* • *Bill type* • *Claim batch #* • *Owner* • *Prior authorization number* • *TCN.*

Advanced Search includes multiple filter options:

1. Click the **Advanced Filter** button.
2. Select the option desired and click **Add** or use **Select All** button to choose all options.
3. Filters added are displayed in the Filters to be applied box.
4. Individual items can be removed from those listed in the **Filters to be applied** field by selecting the item and clicking **Remove**.
5. After making and editing selections, click **Apply**.

Hints:

- *Rest your cursor over any applied filters to display the fly-over to list of filters applied.*
- *Use the up and down arrows in the field to view any multiple filters applied.*

Examples of when to use Advanced Claim Search:

Example #1:

You want to follow up on Denied or To be denied claims submitted to MMIS for the past year to determine what could be finalized or may need to be resubmitted.

1. Select **To be denied** and **Denied** from the Claim status Advanced Filter button and click **Apply**.
2. Select **Open** in the **Disposition** field.
3. Select **Services Dates** in the **Date type** field. Select **Custom** in the **Date range** field.
4. Enter date range covering the past year.
5. Click the **Search** button and results display in the grid.

Example #2:

You need to see how much was paid to your agency by MMIS for LTCC and RSC-TCM services last year.

1. Select **LTCC** and **RSC-TCM** from the Claim category Advanced Filter button and click **Apply**.
2. Select **Paid** and **Partially paid** from the Claim status Advanced Filter button and click **Apply**.
3. Select **Service Dates** in the **Date type** field.
4. Select **Last Year** in the **Date range** field.
5. Click the **Search** button and results display in the grid.