



# NaviNet Claims Investigation User Guide

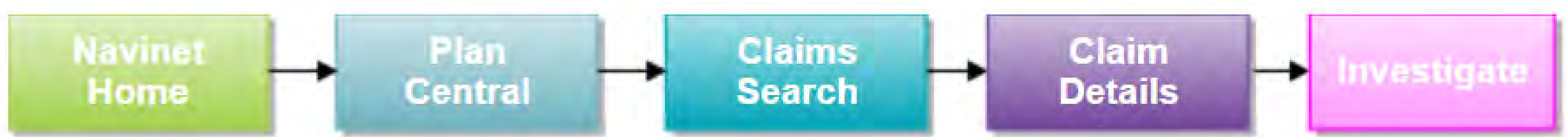




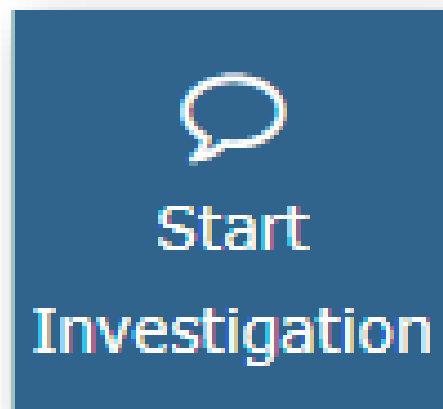
The **Claim Inquiry** function, also referred to in this guide as a Claim Investigation, allows ancillary, facility and professional providers the ability to submit a claim inquiry on claims that were previously finalized. For each submitted transaction, users will receive an electronic response indicating if the claim was adjusted or an explanation why it was not adjusted. This new feature is for individual claims, if users have a large claim project please continue to contact your Provider Account Executive.

This guide was designed to help you:

- Submit a Claim Inquiry
- Review/ Search the Investigation List
- Enable Notifications
- Start a new Claim Investigation



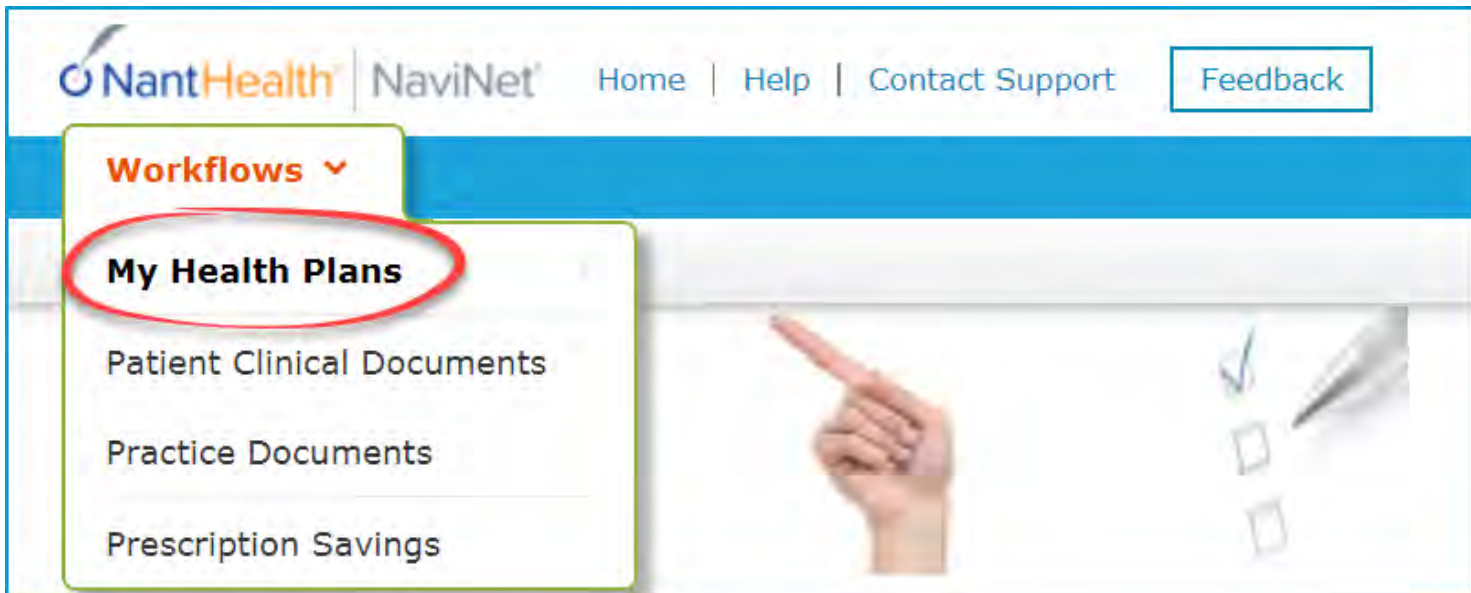
# Claim Status Inquiry Workflow



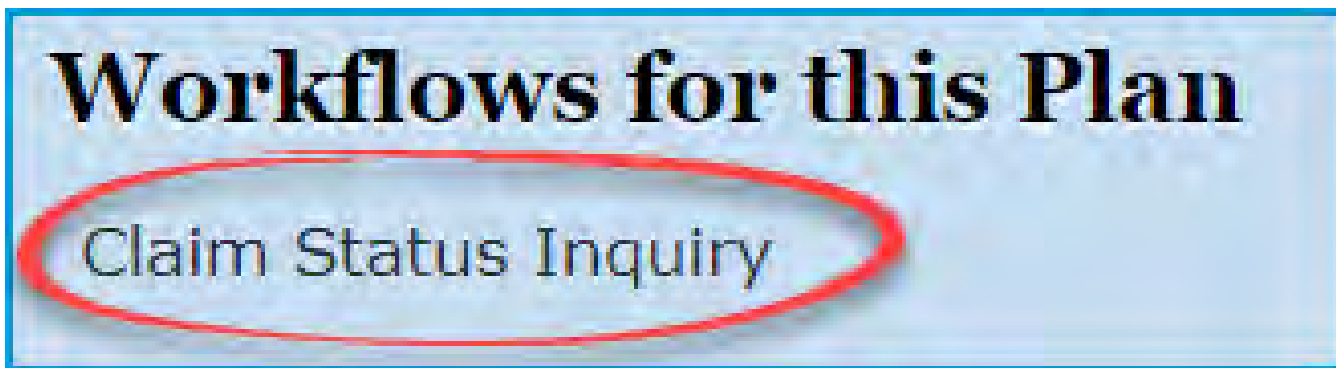
Starting a Claim Investigation (Inquiry)

Sign in to navigate to the NaviNet Open Home screen.

Under Workflows on the NaviNet toolbar, select My Health Plans. Choose AmeriHealth Caritas Next



On the Plan Central screen: Select Claim Status on the Workflows for this Plan menu.



The Claim Status Search screen appears: Enter claim search criteria and click Search

A screenshot of the 'Claim Status: Search' screen. At the top, there are links for '< Back to' and 'Claim Status:'. Below the title 'Claim Status: Search', there is a 'Print' link and a note: 'Online Remittance Advice will be available for claims paid on or after 01/04/2016.' A 'Reset Search Fields' link is also present. The form includes several input fields: 'Billing Entity' (with placeholder 'Type Name or ID to find provider...'), 'Patient Details' section with 'Member ID', 'Last Name', 'First Name' (with 'Optional' text), and 'Date of Birth' (with 'mm/dd/yyyy' placeholder). The 'Claim Status Details' section includes 'Service Start' (08/17/2017) and 'Service End' (11/15/2017), both with calendar icons. There is also a 'Claim ID' field with 'Optional' text. At the bottom right, there is a 'Reset Search Fields' link and a green 'Search' button circled in red.

Note: Fields not marked optional are required.

In the action bar, on the top-right of the screen, click Investigate.

An Investigation window opens

[← Back to Claim Status Search](#) | Claim Status:

## Claim Status Details

**LACI SMITH**  
Born on 01/01/2000

[Investigate](#) [View/Print](#)

Finalized (Claim Status as of 10/09/2017) Claim ID:20000000000 Service Dates: 09/23/2017 to 09/23/2017

<b>INSURANCE DETAILS</b> Health Plan Member ID: 555555555	<b>Total Billed:</b>	<b>\$275.00</b>
<b>BILLING ENTITY</b> SMITHTOWN PEDIATRICS Tax ID: 012345678 Provider PIN: 123456	<b>Total Paid:</b>	<b>\$0.00</b>



## Start Investigation

- In the blue panel on the left of the investigation screen is a **Start Investigation** icon. Click this to create a new message.

## Reason For Investigation

- Select the reason for the investigation by selecting one of the options in the dropdown.

### Select reason for investigation ...

Eligibility Updated  
Authorization Updated/On File  
TPL/COB Changed  
Duplicate Payment Received  
Claim Underpaid  
Claim Overpaid

## Investigation Details

- Enter inquiry details. Please be as specific as possible when entering your inquiry.

## Contact Information

- Enter in your contact information.

## Send Investigation

- Click **Send**.

**Start Investigation**

**LACI SMITH**  
55555555

Date of Service	Claim ID	Billed Amount	Finalized
09/23/2017 to 09/23/2017	200000000000	\$275.00	✓

Reason: Select reason for investigation ...

Enter investigation details ...

2000 characters left

**Contact Information**

First name ... Last name ...

Email address ...

Telephone number ... Ext: Optional

Cancel **Send**

*Email address is required but notifications will not be sent via email.*

# The inquiry will now appear in your Investigation List

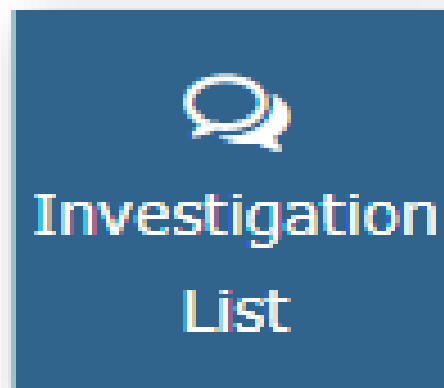
The screenshot displays a software interface for an 'Investigation List'. On the left is a vertical navigation menu with three items: 'Start Investigation' (with a speech bubble icon), 'Investigation List' (with a speech bubble icon and highlighted in dark blue), and a third unlabeled item. The main content area is titled 'Investigation List' and contains the following information:

- Buttons: 'Status Details', 'Start New Investigation', and 'View/Print'.
- Claimant: **LACI SMITH**, ID: 55555555
- Table of Claim Details:

Date of Service	Claim ID	Billed Amount	Status
09/23/2017 to 09/23/2017	2000000000000	\$275.00	✓ Finalized
- Alert: A red oval highlights a blue arrow icon followed by the text **Claim Overpaid**. Below this, it shows 'Raised on Today' and 'Reference --'.



# Claim Status Inquiry Workflow



Continuing Claim Investigations (Inquiry)



# Investigation List

## Status Details

- On the upper-left of the window is a blue Status Details link. Click this to be redirected to the claim details page.

## Start New Investigation

- On the upper-right of the Investigation screen is a Start New Investigation link. Click this to create a new message for the health plan.

## View/Print

- View /Print Claim Investigation

## Investigation List

- In the blue panel on the left of the investigation screen is an Investigation List icon. Click this to see the list of existing investigations.

The screenshot shows a web application interface for an investigation list. At the top left, there is a blue sidebar with a 'Start Investigation' button and an 'Investigation List' button (highlighted with a red border). The main content area has a header with a 'Back to Investigation List' link and three action buttons: 'Status Details', 'Start New Investigation', and 'View/Print'. Below the header, a claim entry for 'LACI SMITH' (ID: 55555555) is shown with a 'Finalized' status. A table below lists 'Claim Overpaid' items with columns for 'Raised on' and 'Reference'. At the bottom, there are two messages: one from 'Jennifer Jones' and another with a red 'NEW' badge.

## Claim Status

- On the upper-right of the Investigation screen, the status of the claim is displayed.

## NEW

- In the Investigation List view, if responses from the health plan are unread, a red NEW icon appears next to the message

# Communication between You & The Health Plan

[← Back to Investigation List](#) [Status Details](#) [Start New Investigation](#) [View/Print](#)

**LACI SMITH**  
55555555

Date of Service	Claim ID	Billed Amount	✓ Finalized
09/23/2017 to 09/23/2017	200000000000	\$275.00	

---

**Claim Overpaid**

Raised on	Reference	
Today	--	<a href="#">← Prev</a> <a href="#">Next →</a>

---

Today

**User** (Jennifer Jones): Hello, the member's eligibility has been updated, please review for claim adjustment.

**Health Plan** (NEW): Thank you for your response, we will respond to your request within 10 business days.

# View/Print your Claim Investigation Communications

Start Investigation

Investigation List

Back to Investigation List

Status Details Start New Investigation **View/Print**

**LACI SMITH**  
55555555

Date of Service	Claim ID	Billed Amount	Status
09/23/2017 to 09/23/2017	200000000000	\$275.00	Finalized

**Claim Overpaid**

Raised on	Reference
Today	--

Today

Jennifer Jones Hello, the member's eligibility has been updated, please review for claim adjustment.

**NEW** Thank you for your response, we will respond to your request within 10 business days.

The reference field will not be populated.

**Claim Overpaid**

Raised on:	Reference:
11/15/2017	--

**Patient Details**

Patient Name:	Member ID:	Date of Birth:
LACI SMITH	55555555	01/01/2000

**Claim Details**

Claim ID:	Date of Service:	Claim Value:	Status:
200000000000	09/23/2017 to 09/23/2017	\$275.00	Finalized

11/15/2017

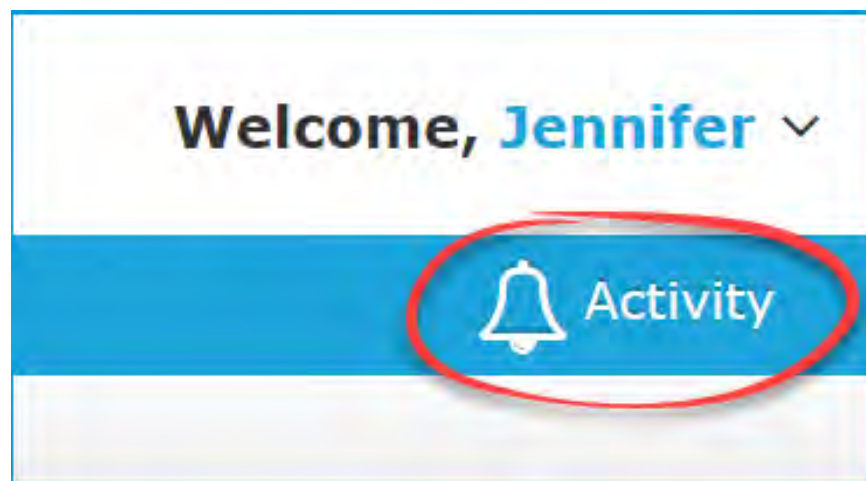
Jennifer Jones Hello, the member's eligibility has been updated, please review for claim adjustment.

Health Plan Thank you for your response, we will respond to your request within 10 business days.





# Claim Investigations



## Enabling Notifications

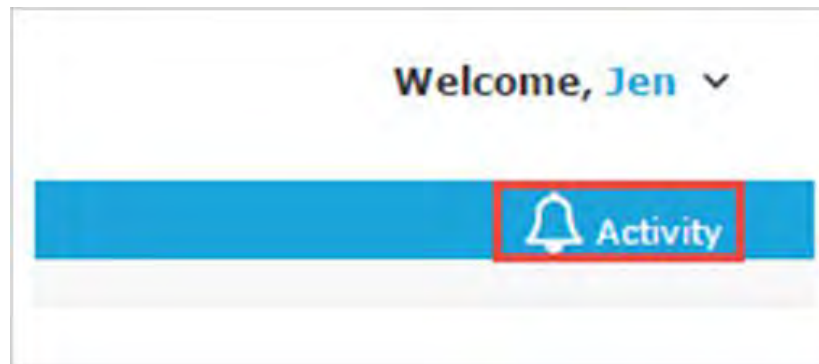
# Enabling Claim Investigation Notifications

How will I be notified once AmeriHealth Caritas Next responds to my inquiry?

## Settings Tab Enabling Notifications

Sign in to navigate to the NaviNet Open Home screen.

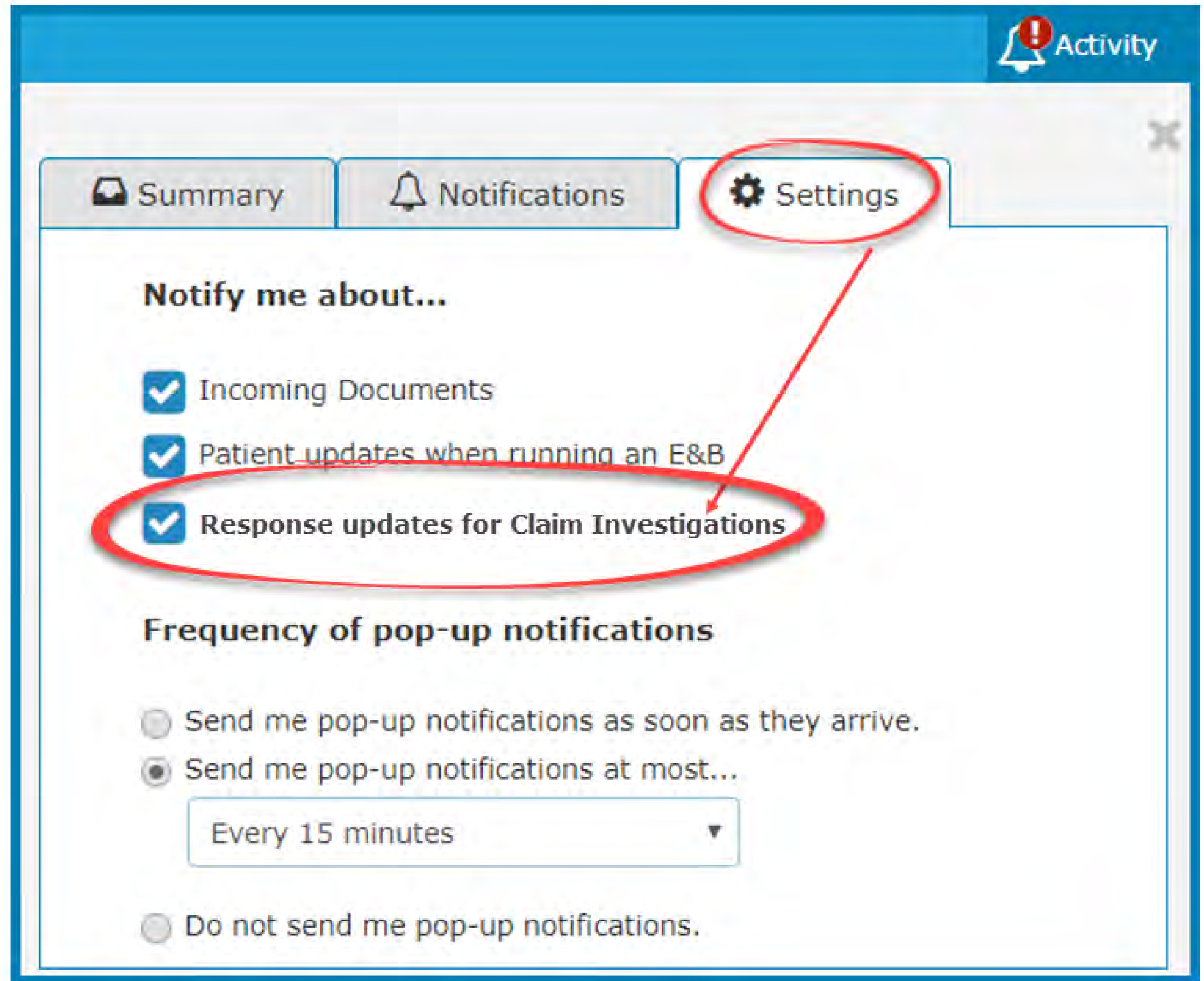
Click Activity located on the top right of your NaviNet toolbar.



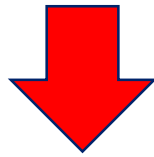
Select the Settings tab.

Check the Response updates for Claim Investigation box.

Select the frequency in which you would like to receive you notifications.

A screenshot of the NaviNet "Settings" page. The page has a blue header with an "Activity" button (bell icon) in the top right. Below the header are three tabs: "Summary", "Notifications", and "Settings". The "Settings" tab is circled in red. Under the "Settings" tab, there is a section titled "Notify me about..." with three checkboxes, all of which are checked. The third checkbox, "Response updates for Claim Investigations", is circled in red. Below this is a section titled "Frequency of pop-up notifications" with three radio button options. The second option, "Send me pop-up notifications at most...", is selected. Below this is a dropdown menu showing "Every 15 minutes". The third option, "Do not send me pop-up notifications.", is unselected.

NOTE: Responses will be available to view for 7 days from the date of notification.



Welcome, Jen ▾

Activity

**Claim Investigation Response Available**

A claim investigation response for Laci Smith has been posted by Health Plan.

[View Response](#)

Start Investigation

Investigation List

Back to Investigation List

Status Details Start New Investigation View/Print

**LACI SMITH**  
55555555

Date of Service	Claim ID	Billed Amount	Finalized
09/23/2017 to 09/23/2017	200000000000	\$275.00	✓

**Claim Overpaid**

Raised on	Reference
Today	--

Today

Jennifer Jones Hello, the member's eligibility has been updated, please review for claim adjustment.

**NEW** Thank you for your response, we will respond to your request within 10 business days.

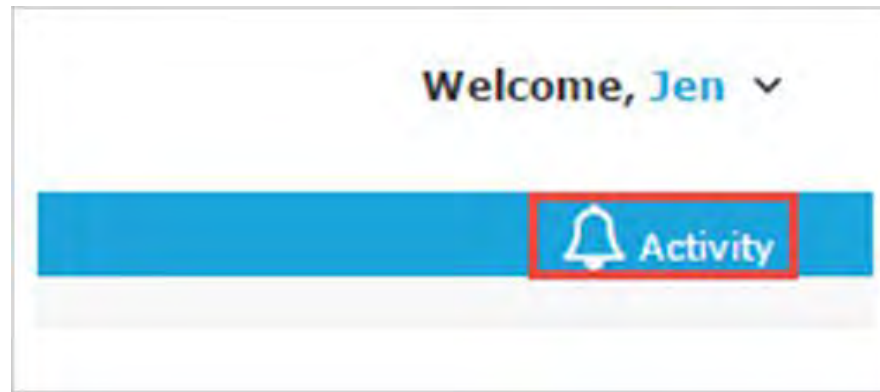
Once you have enabled the Claims Investigations Notifications you will begin receiving updates for existing claim inquiries you sent to AmeriHealth Caritas Next



# Notifications Tab

Sign in to navigate to the NaviNet Open Home screen

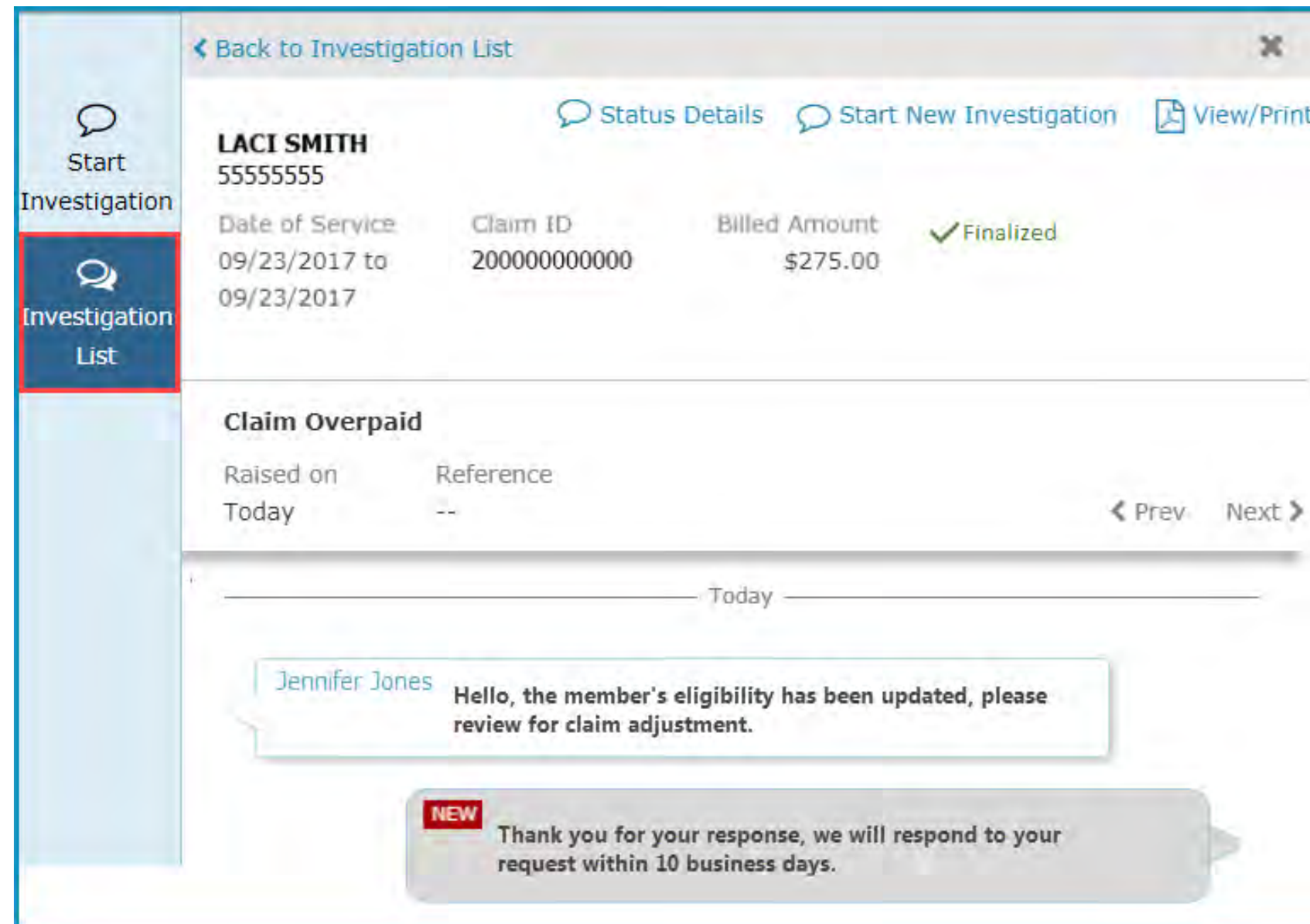
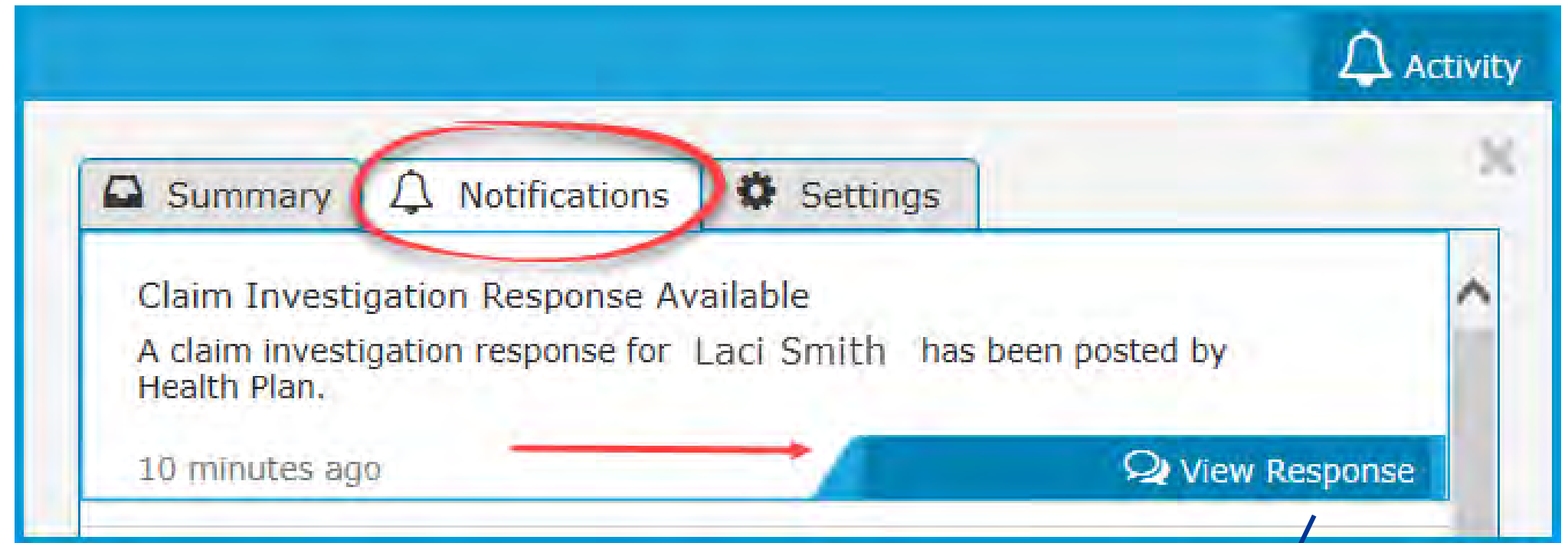
Click Activity located on the top right of your NaviNet toolbar



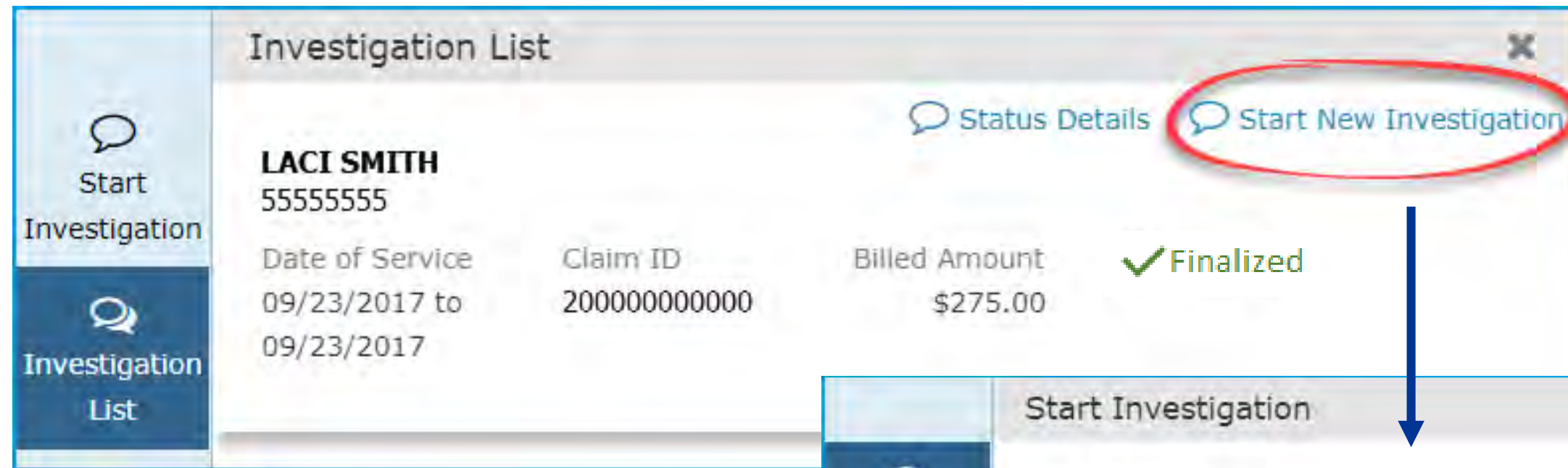
Select the Notifications tab

Hover over the bottom section of each notification to View Response

Click on Open Investigations to view Claim Investigations sent to the Health Plan



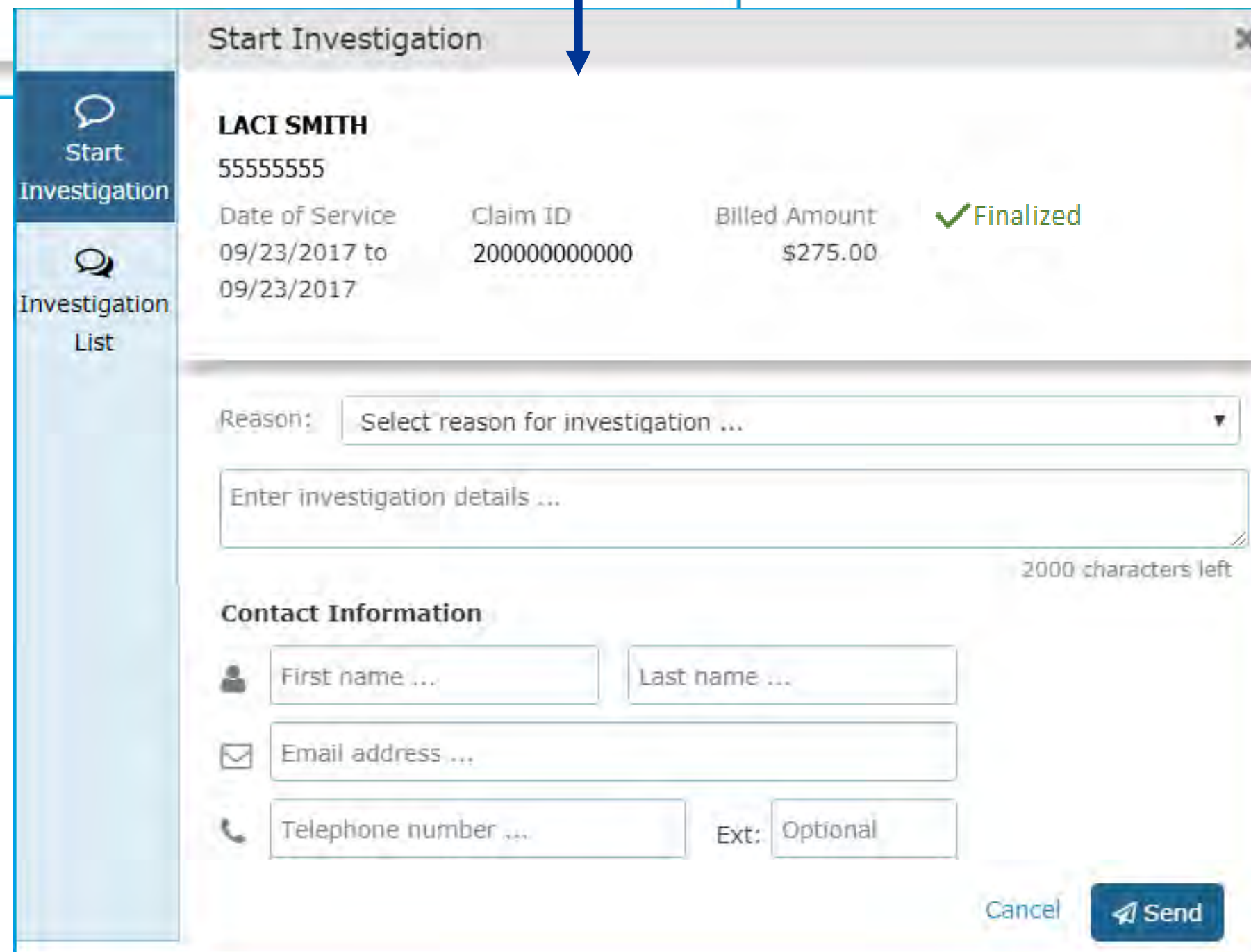
# Start New Investigation From Investigation List



The screenshot shows a window titled "Investigation List" with a sidebar on the left containing "Start Investigation" and "Investigation List" buttons. The main content area displays details for a patient named LACI SMITH (ID: 55555555) with a "Finalized" status. A red circle highlights the "Start New Investigation" link in the top right corner of the window.

Date of Service	Claim ID	Billed Amount	Status
09/23/2017 to 09/23/2017	2000000000000	\$275.00	Finalized

On the upper-right of the Investigation screen is a **Start New Investigation** link. Click this to create a new message for AmeriHealth Caritas Next.



The screenshot shows a window titled "Start Investigation" with a sidebar on the left containing "Start Investigation" and "Investigation List" buttons. The main content area displays the same patient details as the previous window. Below the details is a form with a "Reason" dropdown menu, a text area for "Enter investigation details ..." (with a 2000 character limit), and a "Contact Information" section with fields for "First name", "Last name", "Email address", "Telephone number", and "Ext: Optional". "Cancel" and "Send" buttons are at the bottom right.

Reason:

Enter investigation details ...  
2000 characters left

**Contact Information**

Ext:

# Status Details

Investigation List

Start Investigation

Investigation List

**LACI SMITH**  
55555555

Date of Service	Claim ID	Billed Amount	Finalized
09/23/2017 to 09/23/2017	200000000000	\$275.00	

Status Details Start New Investigation

On the upper-left of the window is a blue Status Details link. Click this to be redirected to the claim details page.

# Claims Details Page

Back to Claim Status Search | Claim Status:

Claim Status Details | **LACI SMITH**  
Born on 01/01/2000

Investigate View/Print

Finalized Claim Status as of 10/09/2017 Claim ID: 200000000000 Service Dates: 09/23/2017 to 09/23/2017

**INSURANCE DETAILS**  
Health Plan  
Member ID: 55555555

**BILLING ENTITY**  
SMITHTOWN PEDIATRICS  
Tax ID: 012345678  
Provider PIN: 123456

**Total Billed: \$275.00**  
**Total Paid: \$0.00**