CLAIMS INQUIRY & INVESTIGATION

User Guide

Corporate Provider Network Management, Training

AmeriHealth Caritas
Care is the heart of our work

July 2025

TABLE OF CONTENTS

03 OVERVIEW

04 STARTING A CLAIM INVESTIGATION (INQUIRY)

07 CONTINUING CLAIM INVESTIGATIONS (INQUIRY)

13 CLAIM INVESTIGATION NOTIFICATIONS

AmeriHealth Caritas
Care is the heart of our work

OVERVIEW

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 of 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.

Learning Objectives

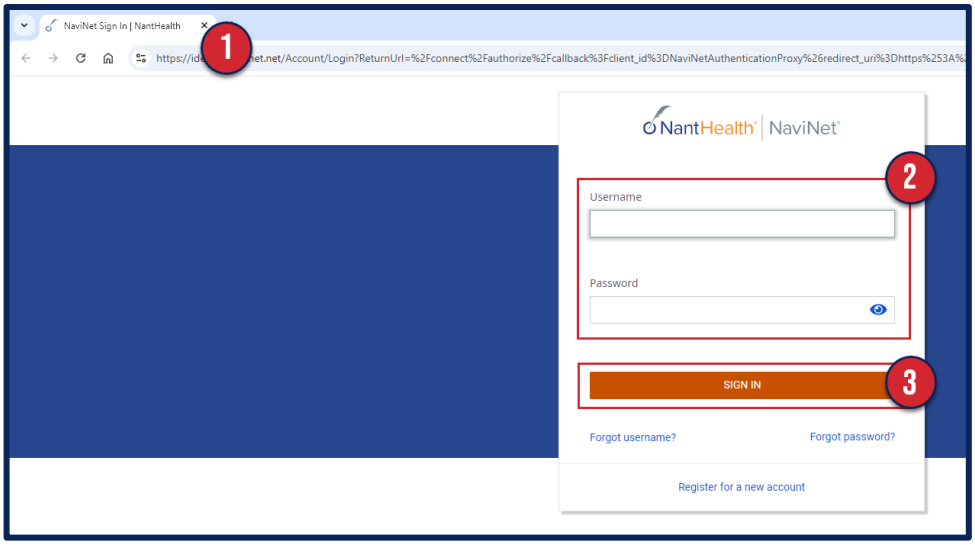
In this guide, you will learn to do the following:

1. Submit a Claim Inquiry
2. Review / Search the Investigation List
3. Enable Notifications
4. Start a new Claim Investigation

NaviNet

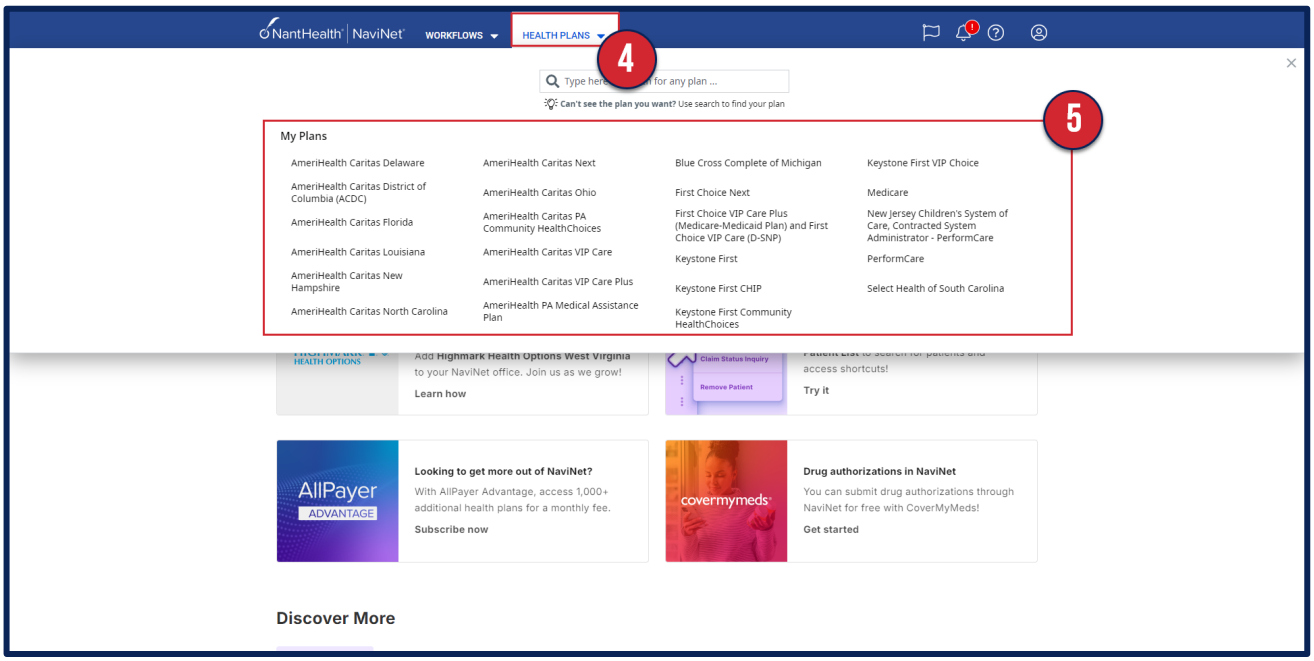
Sign in to NaviNet to navigate to the home screen:

1. Go to https://navinet.navimedix.com.
2. Enter your Username and Password.
3. Click Sign In.



Once you are successfully logged into NaviNet:

4. Click on Health Plans from the top menu bar.
5. Select your health plan.

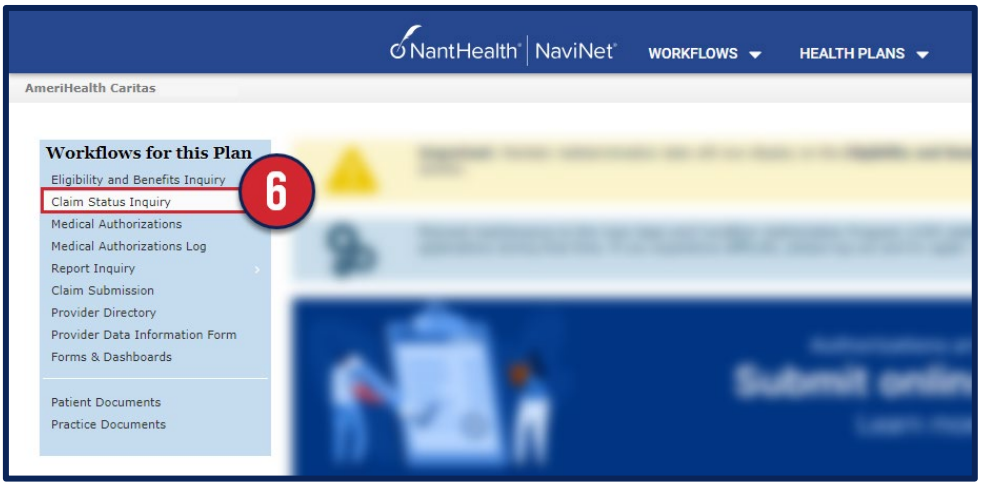


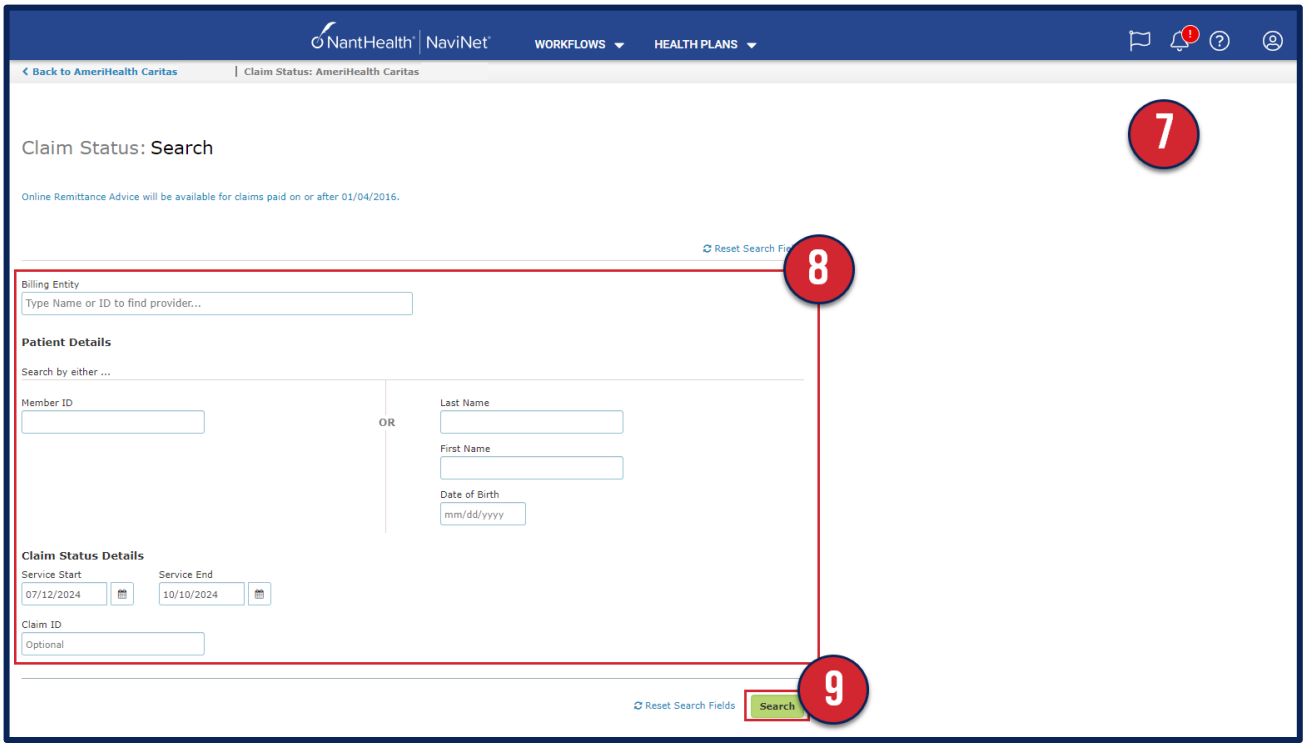
STARTING A CLAIM INVESTIGATION (INQUIRY) CONT'D.

Starting a Claim Investigation (Inquiry) Cont'd.

The Plan Central screen will display.

6. Click on Claim Status Inquiry from the Workflows for this Plan menu.
7. The Claim Status Search screen appears.
8. Enter claim search criteria.
9. Click Search.

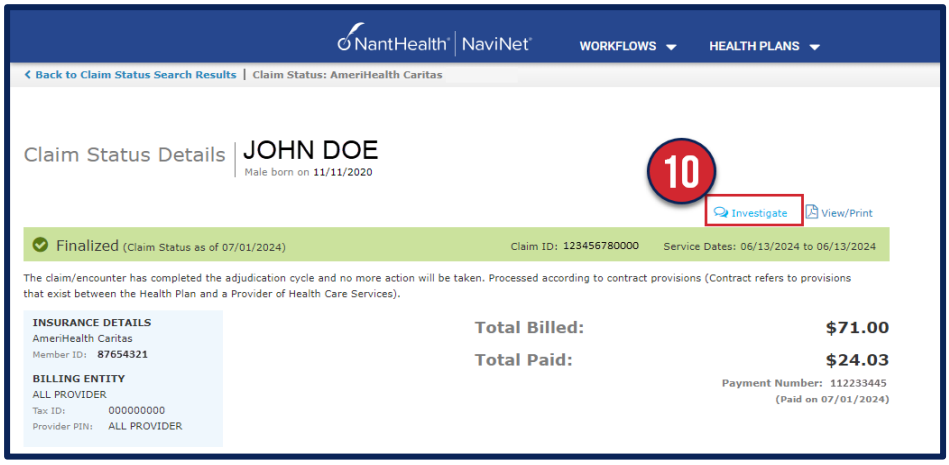


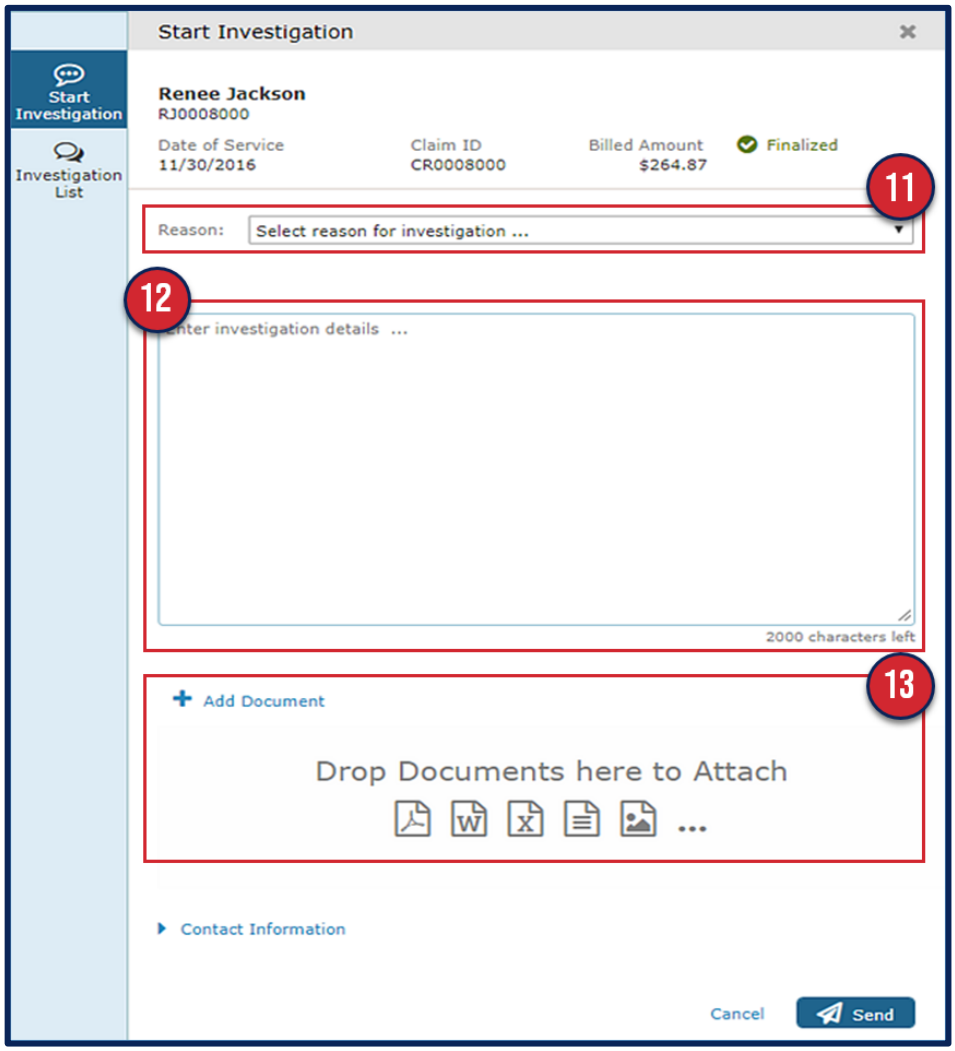


STARTING A CLAIM INVESTIGATION (INQUIRY) CONT'D.

Starting a Claim Investigation (Inquiry) Cont'd.

10. Click Investigate on the Claims Status Detail page.
11. On the Start Investigation pop-up, select the reason for the investigation.
12. Enter investigation details. Please be as specific as possible.
13. To add an attachment to the investigation, click **Add Document** to choose a document, or drag and drop a document into the applicable field.



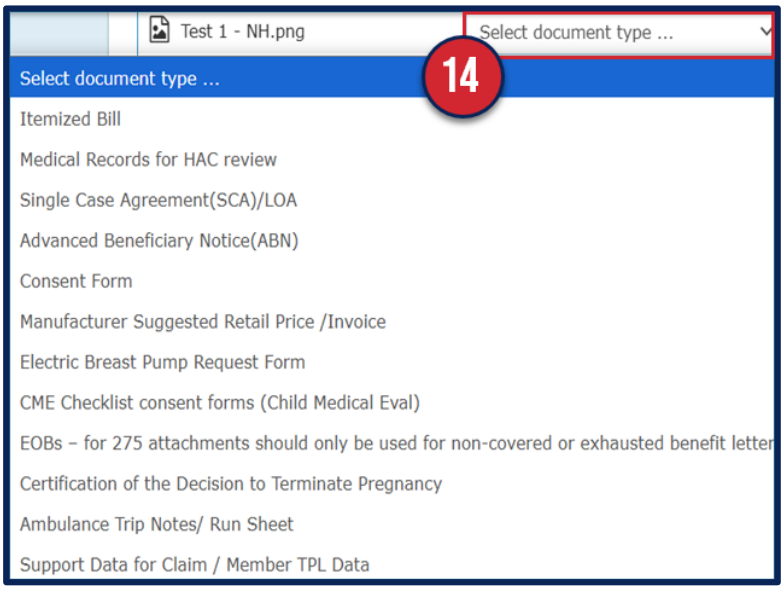


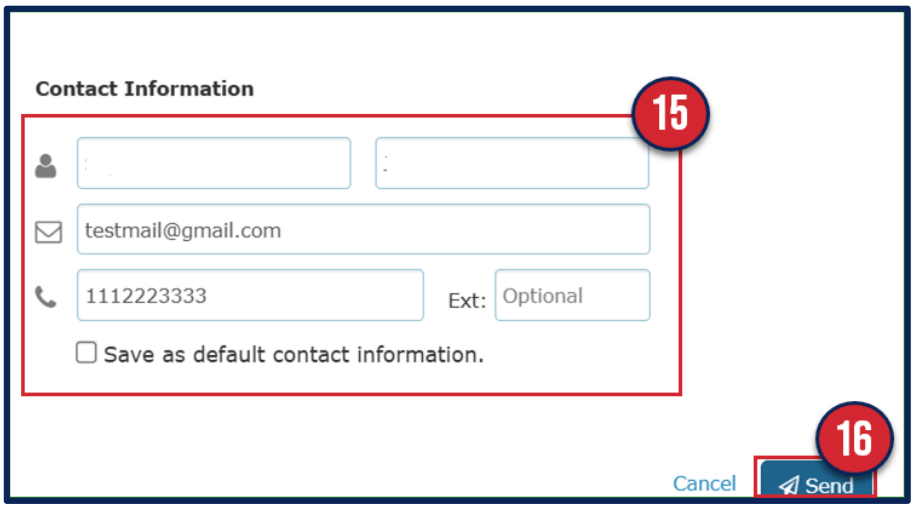
STARTING A CLAIM INVESTIGATION (INQUIRY) CONT'D.

Starting a Claim Investigation (Inquiry) Cont'd.

14. Select the document type from the dropdown menu.
15. Type your contact information.
16. Click Send.

The system sends the investigation message to the plan, and your message appears in the Investigation List pane.



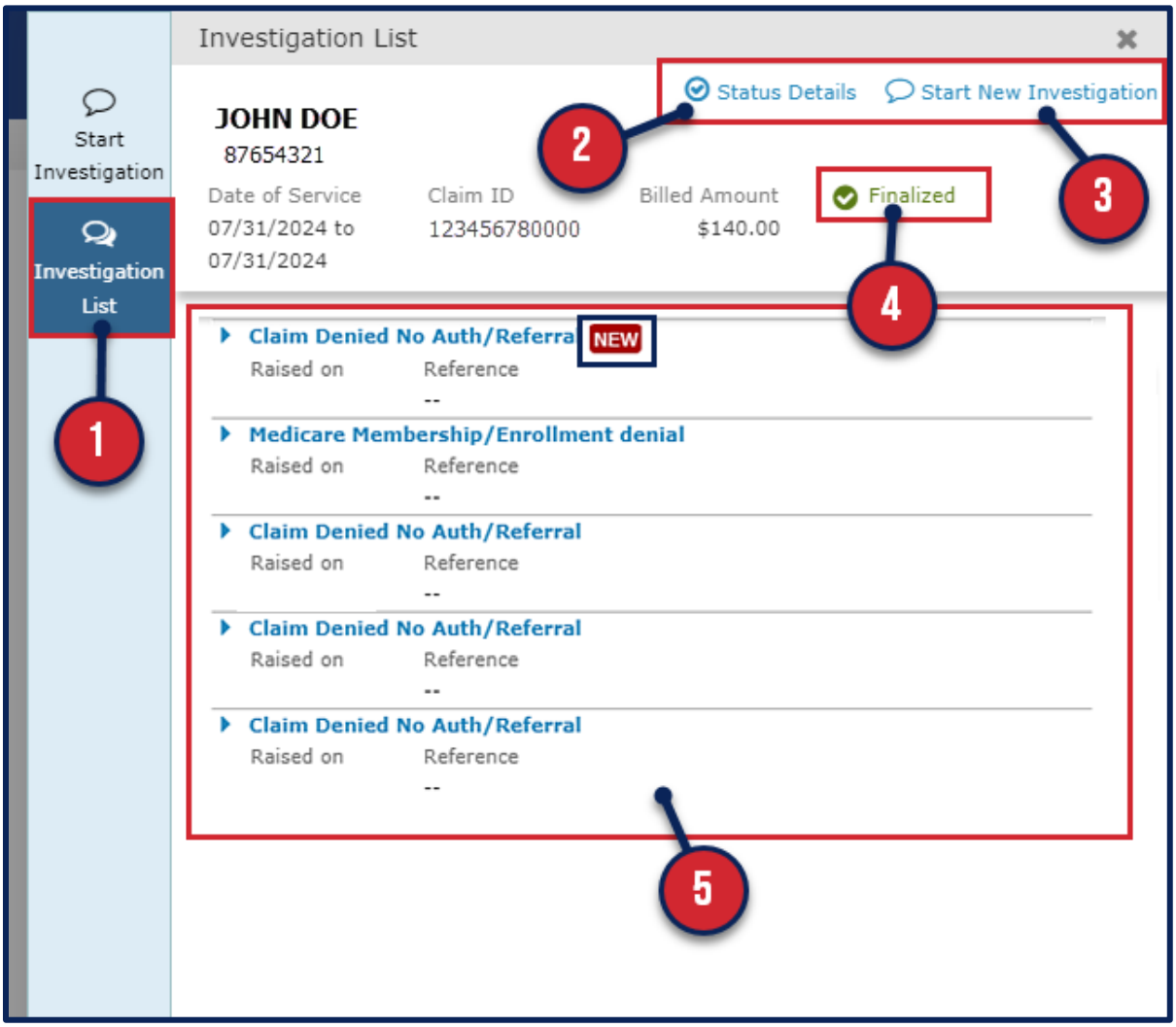


Note: Email address is required, but notifications will NOT be sent via email.

Investigation List Tab

Your inquiry will now show on the investigation list tab.

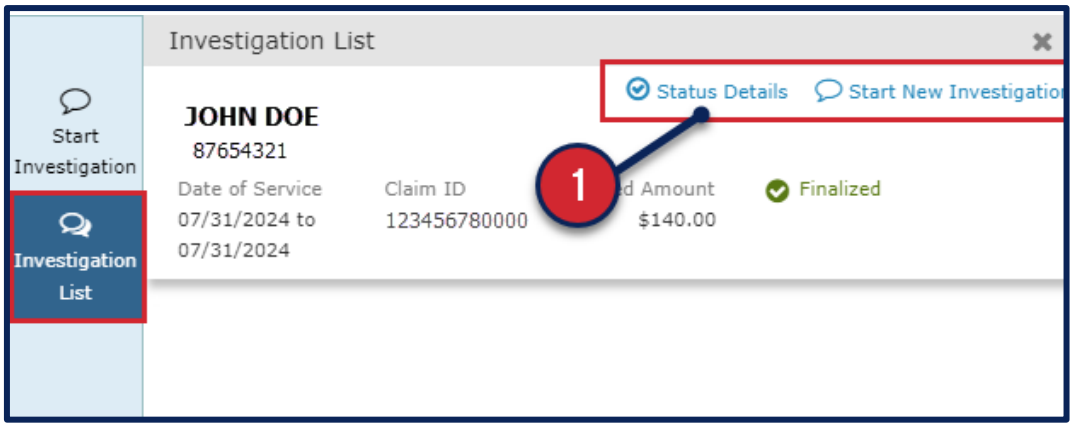
1. **Investigation List Icon** – Click this icon to see the list of existing investigations.
2. Status Details – Click this to be redirected to the claim details page.
3. Start New Investigation – Click it to create a new message for the health plan.
4. **Claim Status** – The status of the claim is displayed on the upper right of the investigation screen.
5. Investigation Communications – Click on an investigation to view the health plan response.
   - **NEW** icon – This icon will appear next to the investigation with a health plan response that you have not yet viewed.

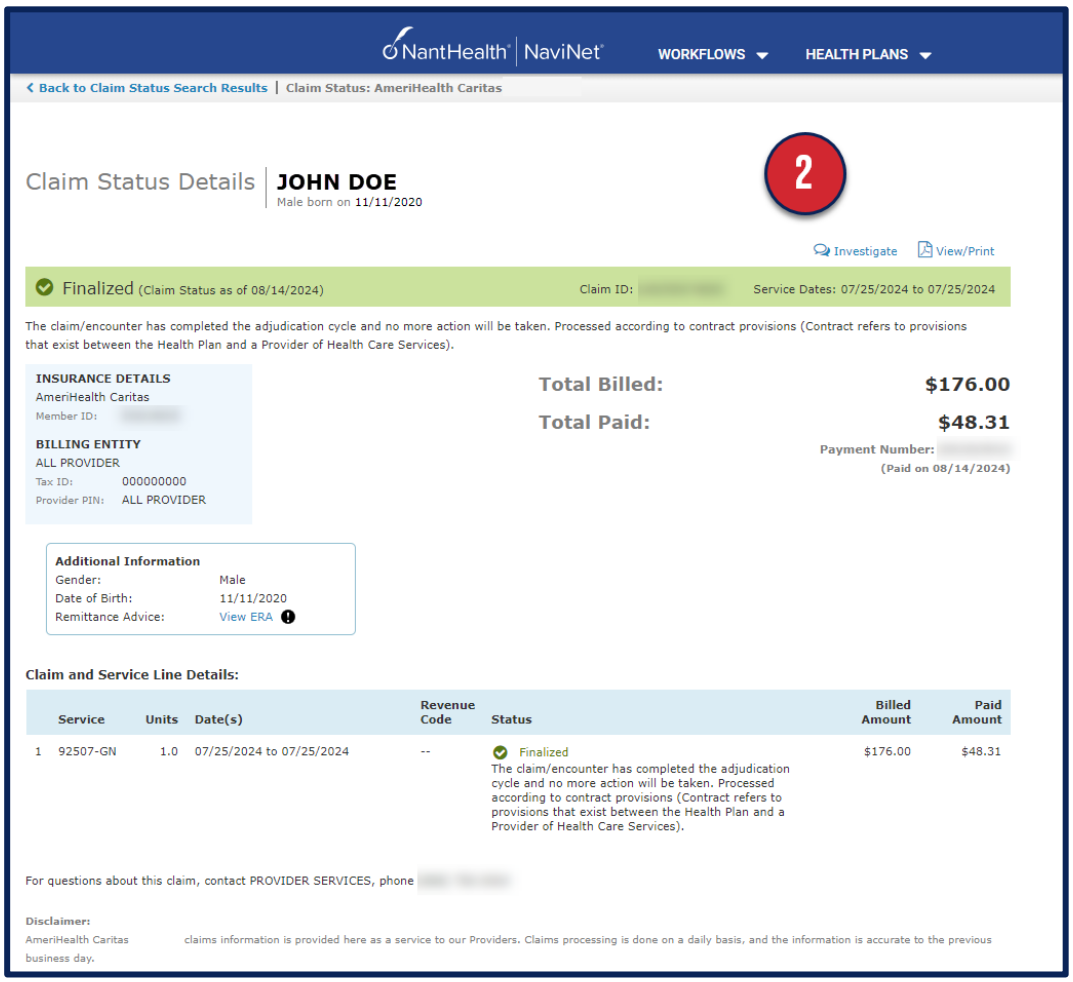


CONTINUING CLAIM INVESTIGATIONS (INQUIRY) CONT'D.

Investigation List: Status Details

1. When you click on Status Details
2. You will be redirected to the claim details page

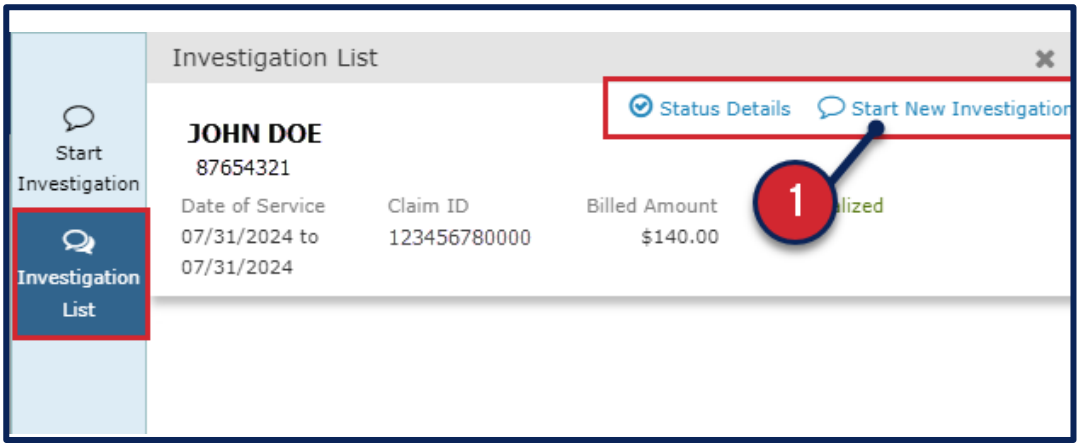


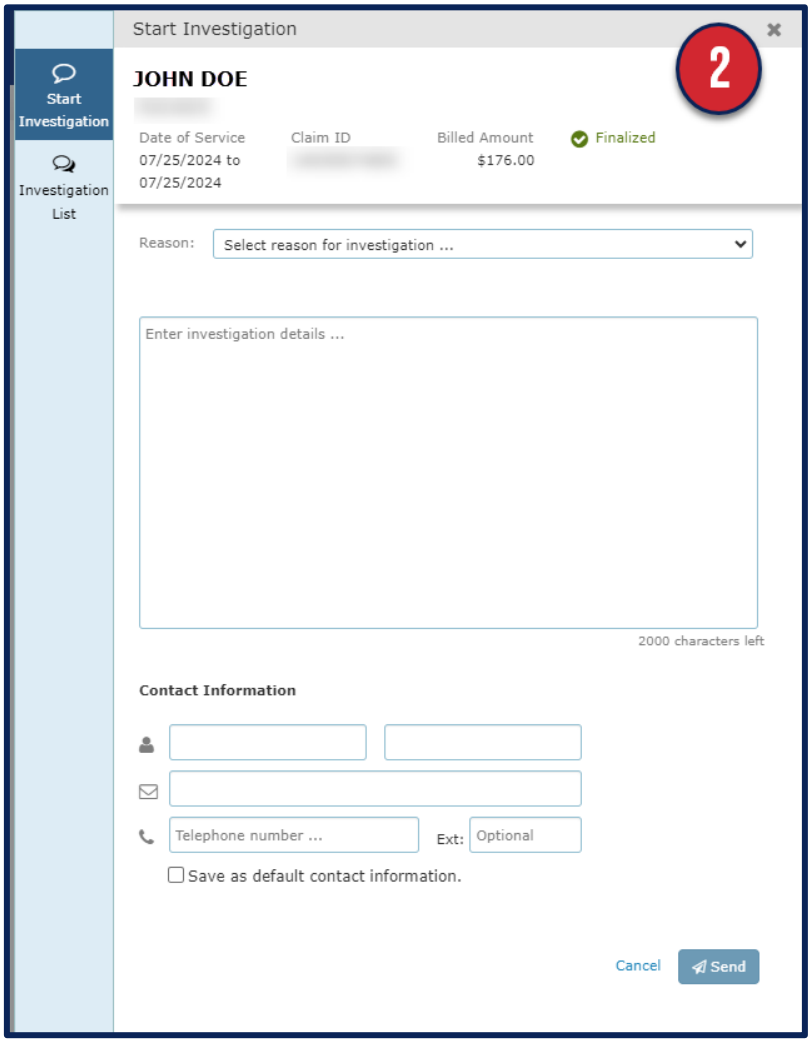


CONTINUING CLAIM INVESTIGATIONS (INQUIRY) CONT'D.

Investigation List: Start New Investigation

1. When you click on Start New Investigation
2. A new window within the Start Investigation tab will display to create a new message

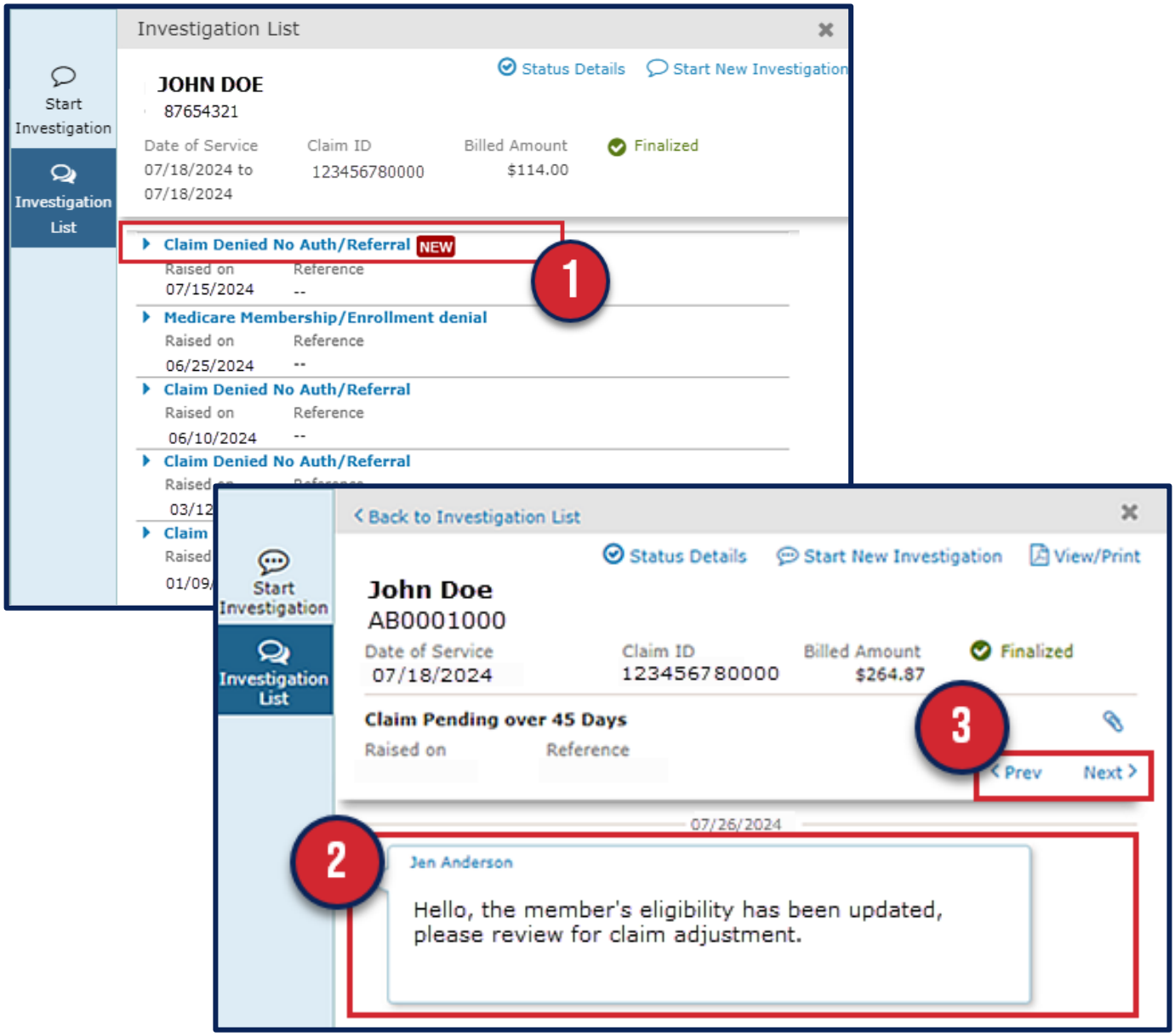




CONTINUING CLAIM INVESTIGATIONS (INQUIRY) CONT'D.

Investigation List: Communication between You & The Health Plan

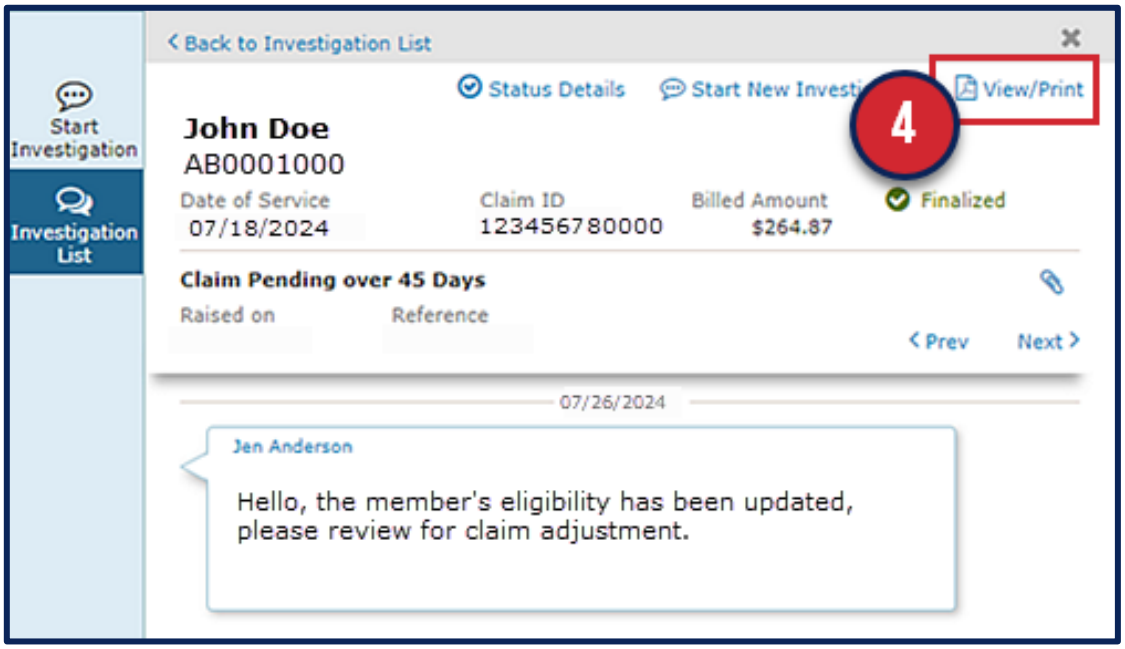
1. When you click on an investigation in the list
2. The window displays all previous communication with the health plan concerning the investigation
3. To view the other investigations for this claim, click Prev and Next



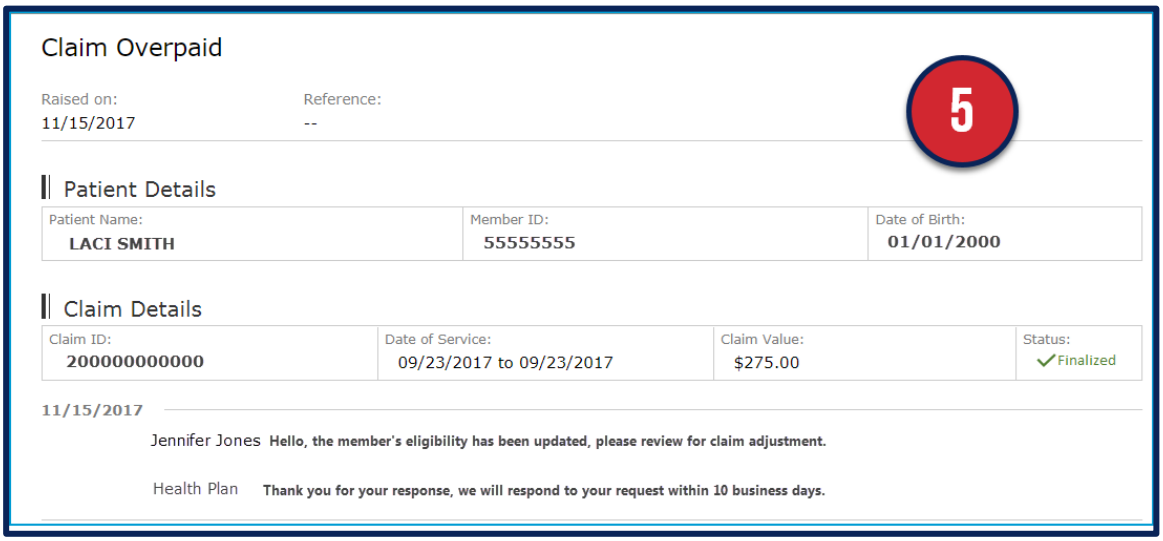
CONTINUING CLAIM INVESTIGATIONS (INQUIRY) CONT'D.

Investigation List: Communication between You & The Health Plan Cont'd.

4. To print the messages in the investigation, click View/Print in the upper-right corner of the screen
5. Claim Investigation messages will display in another window



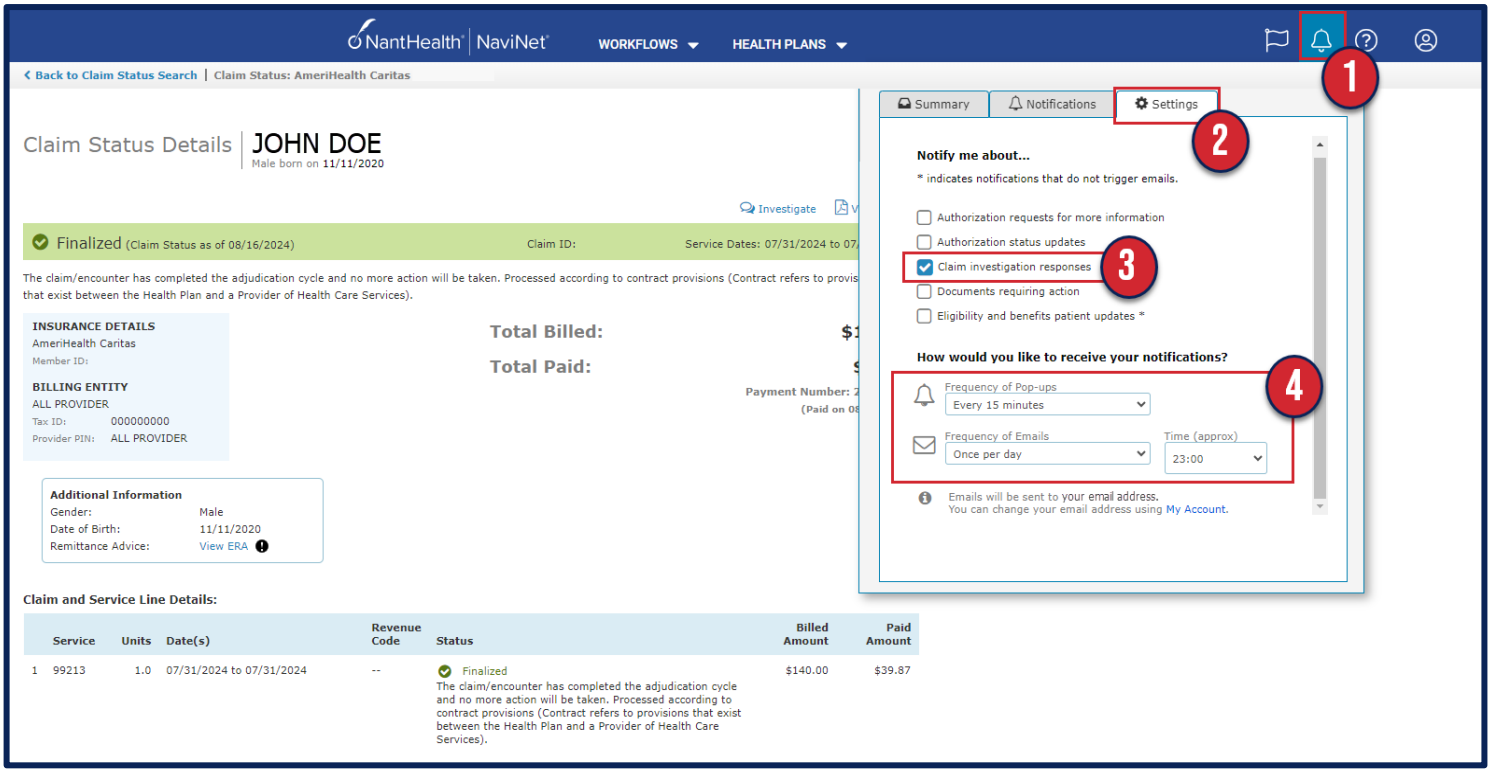
Note: The reference field will **not** be populated.



Enabling Claim Investigation Notifications

To enable Claim investigation notifications:

1. Click the Activity Icon (bell) on the Menu bar
2. Select the Settings tab
3. Check the box for Claim Investigation responses
4. Select the frequency in which you would like to receive your notifications



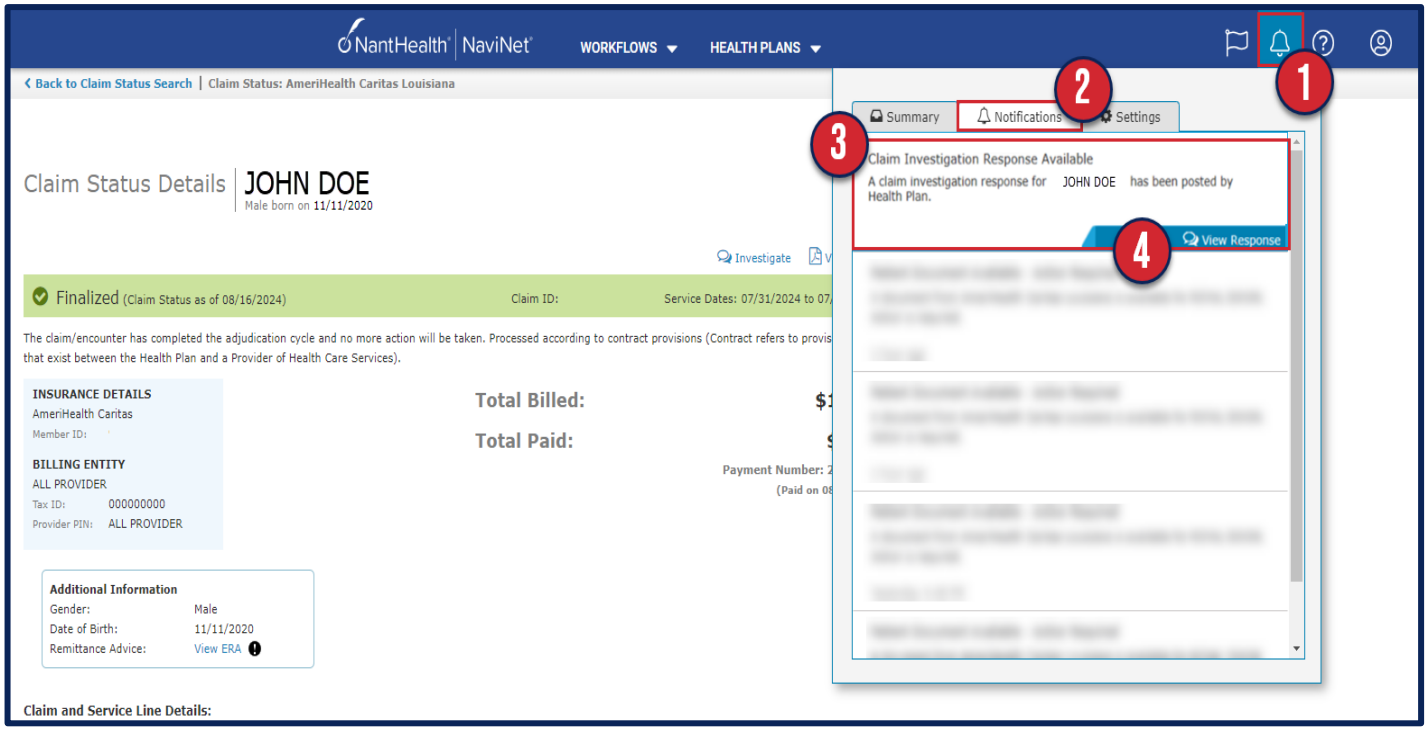
CLAIM INVESTIGATION NOTIFICATIONS CONT'D.

View Notifications

Once you have enabled the Claims Investigations Notifications you will begin receiving updates for existing claim inquiries you sent.

To view the notifications:

1. Click the Activity Icon (bell) on the Menu bar
2. Select the Notifications tab
3. Select the notification you want to view
4. Hover over the notification and click the View Response to view the Claim investigation sent to the health plan.



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

AmeriHealth
Caritas
Care is the heart of our work