



Provider Quick Start Guide

Review Coverage and Claim Information

Contents

Open a member's record	3
Review coverages and benefits	4
Review claims	4
Ask a question about a claim	5

Review Coverage and Claim Information

Open a member's record

1. Click **Select Patient**.
2. Click **Search all Patients**.
3. Enter the member's name, birth date, or MRN and click **Search**.

The dashboard features four primary action buttons: **Select Patient** (with a magnifying glass icon), **Create Referral** (with a speech bubble and plus icon), **Claim Search** (with a document icon), and **Remittance Advices** (with a document and dollar sign icon). Below these is a notification bar for **Unread Messages**, which includes **CRM (1)** and **Referral Notification Letter (2)**.

The screenshot shows the Epic system's **Patient Search** interface. The top navigation bar includes icons for Home, In Bas..., CRM, Patien..., Referr..., Claims, Expla..., Catalog, Patient, Menu, and Log Out. Below the navigation bar are tabs for **Coverages & Benefits**, **Demographics**, **Provider Search**, **New Referral**, and **Referral by Member**. The main search area has two tabs: **Search My Patients** and **Search All Patients** (which is selected). A message box states: "Fill out the required fields to gain access to a patient/member. Enter additional information for a more accurate match." The search form includes the following fields: **Name** (required), **Sex** (required), **Birth Date** (required), **SSN Last 4** (warning), **MRN** (warning), **Member ID** (required), **ZIP Code** (required), and **Medicare Beneficiary Identifier** (warning). A **Search** button and a **Clear** button are located at the bottom right of the form.

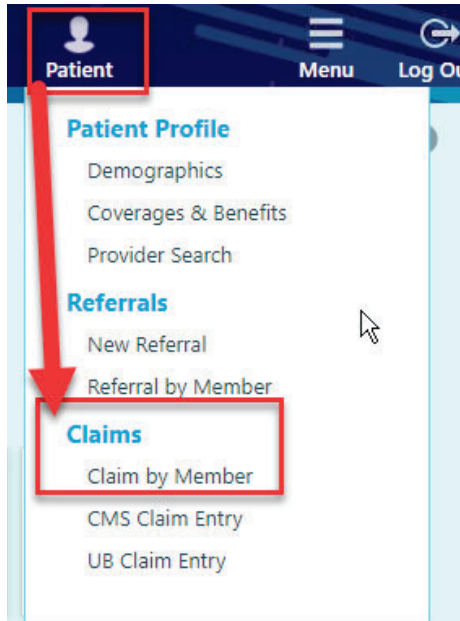
Review coverages and benefits

1. From a member's workspace, click the **Coverages & Benefits** tab.
2. Select **View all coverages on file** to see a full list of the member's past and present coverages.
3. From the Coverages & Benefits workspace, click **Benefits Summary** to see the details about the member's specific benefits plan and package.
4. Click **←Back** to return to the Coverages & Benefits workspace.
5. Click **Coverage Detail Report** to review information about the member's coverages.

The screenshot shows the Epic system interface for a member's workspace. The top navigation bar includes icons for Home, In Bas..., CRM, Patien..., Referr..., Claims, Explan..., Catalog, Test, P..., Menu, and Log Out. The main section is titled 'Coverages & Benefits' and displays patient information for 'Paymee Test' (Female, 51 y.o., 12/1/1970). The patient's MRN is E4327, and they are associated with 'VALLEY H...'. The interface shows a table of coverages on file, with one row highlighted: 'VALLEY HEALTH PLAN / IFP BRONZE 60' with an effective date of 01/01/2022, member ID 16400023, employer group IFP Bronze 60, and filing order 1. A red box highlights the 'Benefits Summary' and 'Coverage Detail Report' links.

Review claims

1. From a member's workspace, click the **Claim by Member** tab.
2. Use the **Select a Provider** field to choose a provider whose claims you would like to review.
3. Click the claim number link to view detailed claim information.



Ask a question about a claim

1. From Coverage by member section, click **Ask a Question**.
2. Enter as much information as you can, making sure to change the site to Tapestry Link.
3. Click **Submit** to route the question to an appropriate user. You will receive a response within regulatory guidelines.

A screenshot of the 'Claim by Member' page in a web application. The top navigation bar includes 'Epic' and various icons for Home, In Bas..., CRM, Patien..., Referr..., Claims, Expla..., Catalog, Test, P..., Menu, and Log Out. The main navigation bar shows 'Coverages & Benefits', 'Demographics', 'Provider Search', 'New Referral', and 'Claim by Member'. The patient information section displays 'Paymee Test', 'MRN: E4327', 'VALLEY H...', 'Rel to Sub: Self', 'PCP: None', and 'Access ends (Never)'. Below this, there is a section for 'Claims Inquiry' and 'Claim Details'. A red box highlights the 'Ask A Question' button in the bottom right corner of the claim details section.

Check/EFT	Date	Amount
X11	07/13/2022	\$0.00

Adjudication	
Billed for	\$200.00
Allowed:	\$0.00
Patient total:	- \$0.00
Net Payable:	\$0.00
Interest:	+ \$0.00
Penalty:	+ \$0.00
Total Payment:	\$0.00

Member	Member ID	Effective From
Paymee Test	16400023	1/1/2022

Line of Business	Payment Method	Paid As
Individual and Family	Primary Coverage	Primary