## Addendum

**Employer Portal Homepage** 

The homepage displays navigational options to perform a member search, a claim/re-authorization search, access the Enrollment Portal and/or the Billing Portal. What you as a user see may vary depending on your security permissions and/or role within your organization.

Within the client portal, you will be able to conduct a basic Members, Claims or Pre-Determination Search. Or choose to select an Advanced Search.

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	Welcome back, Johnathan /	ABC Company	Enrollment portal access	Billing portal access		
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Legal disclosures and links are displayed in the page footer section.

# Member Search Features Landing Page

The landing page displays access permissions for either the Client Portal, Enrollment Portal (separate training) and/or the Billing Portal.

You can conduct a basic Members, Claims or Pre-Determination Search. Or choose to select an Advanced Search.

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#### Basic Member ID Search

The Members tab on the Home page view allows you to conduct a Member ID search. Once the results are displayed, you can conduct an advanced member search.

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Search Results

#### Advanced Member Search

From the Home page, you can select to perform an advanced member search by entering in the search criteria which will display all member results for their search criteria. From this list you can select a member to view their member details and eligibility.

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## Member Details Once a member is selected, the full member details will display.

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#2019231020004	01/03/2023	John Smith	20 W 34th St.,	\$900.00	\$821.00	\$821.00	Paid	
#201923102000401	01/03/2023	John Smith	20 W 34th St.,	\$890.00	\$821.00	\$821.00	Not paid	
#201923102000411	01/03/2023	John Smith	20 W 34th St.,	\$880.00	\$821.00	\$821.00	Paid	
#201923102000422	01/03/2023	John Smith	20 W 34th St.,	\$871.00	\$821.00	\$821.00	In progress	
#201923102000434	01/03/2023	John Smith	20 W 34th St.,	\$860.00	\$821.00	\$821.00	Paid	
#201923102000445	01/03/2023	John Smith	20 W 34th St.,	\$857.00	\$821.00	\$821.00	Partially paid	
#201923102000456	01/03/2023	John Smith	20 W 34th St.,	\$846.00	\$821.00	\$821.00	Paid	
#201923102000467	01/03/2023	John Smith	20 W 34th St.,	\$868.00	\$821.00	\$821.00	Denied	
#201923102000478	01/03/2023	John Smith	20 W 34th St.,	\$857.00	\$821.00	\$821.00	Need info	
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#### Member Details $\rightarrow$ Member History $\rightarrow$ Eligibility

Member hi	story				
Procedures	Pre-authorizations / pre-determinations	Claims Eligibility		Q Search by estimate number/pro	cedure name
Member ID	Plan name		Coverage effective date	Termination date	Status
******2154	Delta Dental		06/01/2023	-	Active
*******7635	Delta Dental		05/07/2023	11/11/2023	Active
******3521	Delta Dental		04/20/2023	-	Inactive
******2643	Delta Dental		01/04/2023	-	Gap
*******8905	Delta Dental		12/07/2022	-	Inactive
******4321	Delta Dental		12/07/2022	-	Inactive
******8364	Delta Dental		12/07/2022		Inactive
******0997	Delta Dental		12/07/2022	-	Inactive
******3009	Delta Dental		12/07/2022	-	Inactive

## The Benefits Summary section lists all procedures for in-network providers.

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TRANS. CO. II		Non-Altern		Read of the local ly	V X-Rays	D0215	Space maintainer-fixed	18-66	one time every 6 months per	80%	Not applicable	90 days
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#### **Claims Search Features**

The Claim/pre-determination search section allows you to search for a claim/pre-determination number by claim/pre-determination number. Or conduct an advanced search for a claim or a pre-determination.

Claims Search			
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#### Member Details $\rightarrow$ Member History $\rightarrow$ Procedures

Advanced Search

In the Claims search section, enter in the Claim number as your search criteria. Then click on the Search button to display search results.

#### Member Details $\rightarrow$ Member History $\rightarrow$ Procedures

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To conduct an advanced search, enter in a Date range, Provider last name, Provider first name and/or Status. Then click on the Search button to display search results.



Member Details  $\rightarrow$  Member History  $\rightarrow$  Procedures

Procedures can also be found in the Member History section of the Member Details page.

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Clicking on an individual claim will allow you to view the Procedure Information.

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V 08/26/2023	D0789	D0789	\$750.00	\$149.86	\$320.00	\$320.00	Text here
V 12/28/2023	D0789	D0789	\$750.00	\$149.86	\$320.00	\$320.00	Text here
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Processing policy, Optional information, Attachments, Related documents and Transaction history is also displayed.

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#### **Pre-Determination Search Features**

The Members tab on the Home page view allows you to conduct a Pre-Determination search using the Pre-Determination number. Once the results are displayed, you can conduct an advanced member search.

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Auths & Claims / Pre-Auth						🗇 Print
Pre-auth search	Search Criteria					
Date range*	Pre-auth number	Provider last name	Provider first name	Status		
01/01/2019- 02/01/2024	and 202315202000700 or	Provider last name	Provider first name	I Choose an option	✓ Clear all	Search
Claim number Date of service	Member name 💠 Provider 🌩	Location 💠		Total submitted	Status ≑	
202315202000700 10/02/2023	Courtney Henry Courtney Henr	y 4140 Parker Rd. Allento	wn, New Mexico 31134	\$821.00	Submitted	

Search Results

To conduct an advanced search, enter in a Date range, Provider last name, Provider first name and/or Status. Then click on the Search button to display search results.

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	202315202000700	10/02/2023	Courtney Henry	Courtney Henry	4140 Parker Rd. Alle	ntown, New Mexico 31134	\$821.00	Submitted
	202315202000700	01/21/2023	Jane Cooper	Jane Cooper	6391 Elgin St. Celina	a, Delaware 10299	\$350.00	Denied
	202315202000700	01/15/2023	Annette Black	Annette Black	2972 Westheimer R	d. Santa Ana, Illinois 85486	\$540.00	Submitted
Search Results	202315202000700	09/01/2023	Kristin Watson	Kristin Watson	2464 Royal Ln. Mesa	a, New Jersey 45463	\$275.00	Submitted
	202315202000700	12/23/2023	Dianne Russell	Dianne Russell	8502 Preston Rd. In	glewood, Maine 98380	\$450.00	Submitted
	202315202000700	08/05/2023	Cody Fisher	Cody Fisher	2118 Thornridge Cir.	Syracuse, Connecticut 35624	\$450.00	Ready for full payment
	202315202000700	05/13/2023	Albert Flores	Albert Flores	2715 Ash Dr. San Jo	se, South Dakota 83475	\$946.00	Submitted
	202315202000700	05/03/2023	Arlene McCoy	Arlene McCoy	1901 Thornridge Cir	. Shiloh, Hawaii 81063	\$464.00	Voided
	202315202000700	06/09/2023	Savannah Nguyen	Savannah Nguyer	n 2118 Thornridge Cir.	Syracuse, Connecticut 35624	\$237.00	Ready for adjusted amount
	202315202000700	09/20/2023	Dianne Russell	Dianne Russell	2118 Thornridge Cir.	Syracuse, Connecticut 35624	\$76.00	Submitted
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Procedures can also be found in the Member History section of the Pre-determinations page.

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Click on an individual procedure to view details.

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#### Member Details → Member History → Procedures

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11/15/2023	D0789		D0789	\$750.00	\$149.86	\$320.00	\$320.00	Text here
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Processing policy, Optional information, Attachments, Related documents and Transaction history is also displayed.

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## Patient Relationship Codes

HIPAA Individual Relationshin Codes	Valid Values
G8	Other Relationship
53	Life Partner
43	Child Where Insured Has No Financial Responsibility
41	Injured Plaintiff
40	Cadaver Donor
39	Organ Donor
36	Emancipated Minor
33	Father
32	Mother
29	Significant Other
24	Dependent of Minor Dependent
23	Sponsored Dependent
22	Handicapped/Dependent
21	Unknown
20	Employee
19	Child
18	Self
17	Stepson or Stepdaughter
15	Ward of the Court
10	Foster Child
7	Nephew or Niece
5	Grandson or Granddaughter
4	Grandfather or Grandmother
1	Spouse

Source: CMS (https://med.noridianmedicare.com/web/jea/topics/claim-submission/patient-relationship-codes) Last Updated Dec 09 , 2023