## <sup>-</sup>rack a Claim

t Modified on 07/17/2025 5:34 pm EDT

ollow the steps below to track your claims.

- 1. Select Claim > Claim Tracker.
- 2. Enter your Search Criteria or Load a Search Filter.
  - 1. Use the **Date Submitted** option to filter the search by the**date the claim was sent to the clearinghouse** or the **date it was printed from CMD**.
  - 2. Use the Date of Service (DOS) option to filter the search by date the services were rendered.
  - 3. Use the **Status Date** option to filter claims based on the**date status message was received from the clearinghouse or the payer**.
  - 4. Use the Submission Type drop-down menu to filter the search by electronic, paper, or user print
  - 5. Use the **Processing Mode** drop-down menu to filter the search by **processing mode**.
  - 6. Use the **Tracking Status Type** drop-down menu to filter the search by the**current tracking status of the claim** (e.g., Sent, Accepted, Rejected- Not Fixed/Fixed, Warnings, No Errors, Unprocessed)
  - 7. Use the **Tracking Status Source** drop-down menu to filter the search by**where the status message was sent from**. (e.g., CollaborateMD (Printing the claim, or sending it to the clearinghouse), Clearinghouse, Payer Rejections, EOB Denials.).
  - 8. Use the **Claim Status** drop-down menu to filter the search by the**claim's current status** (e.g., Waiting for Review, On Hold, At Insurance, Waiting to ...).
  - 9. Use the Claim Type drop-down menu to filter the search by Professional or Institutional Claims.
  - 10. Use the **Tracking Status (Contains)** field to filter the search by **keywords in the status message** sent back by the payer.

You are able to search for claims based on a portion of the rejection message, for example, "Invalid Zip Code..."

- 11. Populate the **TCN (Transaction Control Number)** field to filter the search to show specific claims based on the TCN number entered.
- 12. Populate the **Claim field** to filter the search to show specific claims based on the claim number entered.
- 13. Use the **Patient field** to search for all claims associated with the selected patient.

- 14. Use the CPID field to search for claims submitted to a specific CPID.
- 15. Use the applicable drop-down menus to filter your search by specific **Payers**, **Payer Type**, **Billing Providers**, **Rendering Providers**, and/or Facilities.
- 16. Place a check in the **Include claim history** box to include any other claim submissions for claims returned in the search results.
- 3. Click the **Search** button.
- 4. **Optional**: Click on the **T** icon to edit your search criteria.

Sort your search results. Visit ourReorder Table Columns Help Article for detailed steps on how to hide, rearrange or add header columns.

- 5. **Optional**: Use the **Group By** drop-down menu to group your results by date submitted, payer, patient c provider.
- 6. Place a check in the **Expand All** box click on the arrow next to the Claim to see more claim details.
- 7. *Optional*: Click the triangle node next to each claim to expand individually.

۲	33667935	06/24/2019	FORCINA, JANE (#14895571)
	527138297	06/24/2019	Submitted electronically
	527138298	06/24/2019	Submitted electronically

**Tip**: Hovering over a specific status line within the status column after a claim is expanded will allow you to see the complete status message.

- 8. You are able to interact with the search results by right-clicking on a row.
  - **Copy**: Copies the claim information to your clipboard.
  - **Open Patient**: Opens the patient associated to the claim.
  - **Open Claim**: Opens the claim in the Claim Section.
  - Create Task: Creates a task related to the claim.
  - View Reports: View any Clearinghouse Report associated with this claim submission.
  - Mark as Fixed: Marks an error message as "fixed" for tracking and organizational purposes.
  - Find Payer Batch Reports: View any payer batch / Clearinghouse reports associated with this claim submission.

- View Additional Clearinghouse Data: View any Clearinghouse data associated with this claim submission.
- **Print Proof of Timely Filing Letter:** Print a basic proof of timely filing letter directly from Claim Tracker.
- **Print Appeal Letter**: Print a basic appeals letter directly from Claim Tracker.
- 9. Click **Close** to exit the results.