



# Electronic Payments & Statements User Guide



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# Welcome to Electronic Payments & Statements

With Electronic Payments and Statements (EPS) we deliver your claim payments and Explanation of Benefits (EOB) electronically, allowing your office faster payment, easier reconciliation, less paperwork and much greater efficiency.

## Say goodbye to:

- Check clearing wait time
- Check processing fees
- Searching through files for claim and payment information
- Frustrating reconciliation tasks

## And say hello to:

- Direct Deposit (ACH) or Virtual Card Payments
- Online Payment and Claim information
- Fast and Easy information searches
- Simplified reconciliation



## This Guide will Show You How to:

- Download an electronic version of your remittance advice to use with your office computer billing software
- View and print hard copies of your remittance advice
- Search for payments and claims information by Date of Service, Account Number, Patient Name, Payment Number, and more
- Maintain your enrollment information, update office contacts, change bank account information and more

# Get more information about EPS on the Welcome Page

## Resources provides access to:

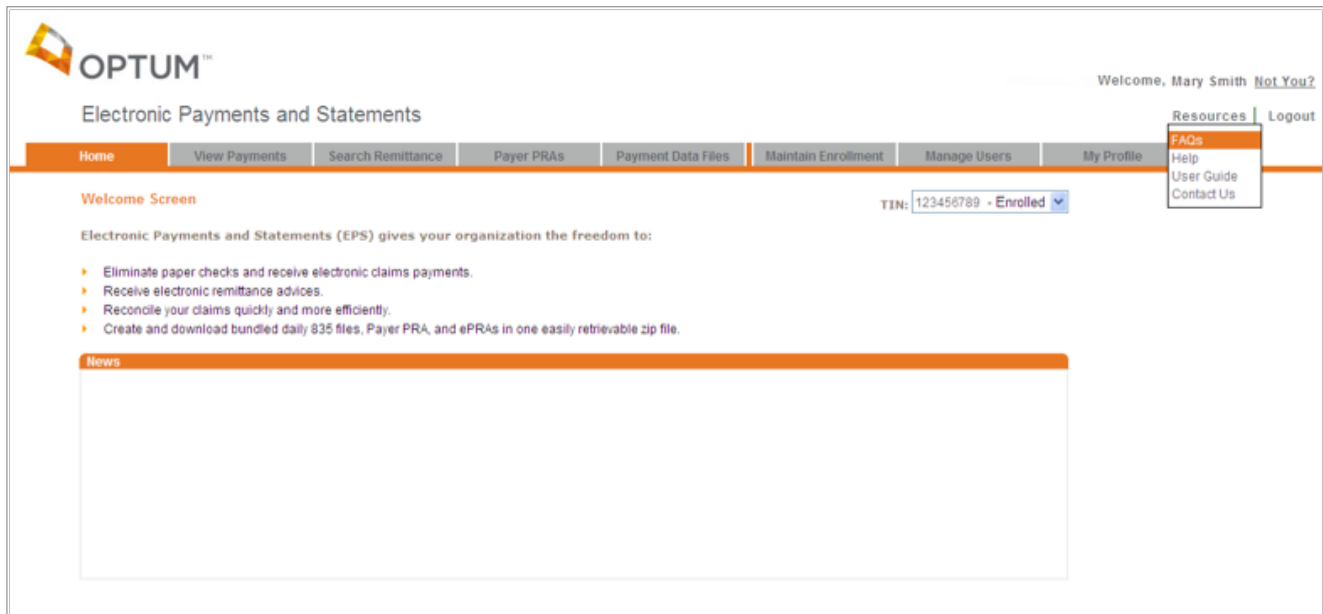
- FAQs
- Help
- User Guide
- Contact Us

## Registered EPS Users

- Select your TIN number from the drop down box.
- The EPS Welcome Page offers you options to View Payments, Search Remittance, Payer PRAs, Payment Data Files, Maintain Enrollment, Manage Users and My Profile.

## Closing EPS Welcome Page

- Select Logout in the upper right-hand corner to end your EPS session.



# View and Print Remittances

## View Payments

Review summary level information for payments

- Select the View Payments tab to display the **Payment Summary**

The screenshot displays the Optum web application interface. At the top left is the Optum logo. The main heading is "Electronic Payments and Statements". In the top right corner, it says "Welcome, Mary Smith" with a "Not You?" link, and "Resources | Logout" below it. A navigation bar contains several tabs: "Home", "View Payments" (circled in red), "Search Remittance", "Payer PRAs", "Payment Data Files", "Maintain Enrollment", "Manage Users", and "My Profile". Below the navigation bar, the page content includes a "Welcome Screen" with a TIN dropdown menu showing "123456789 - Enrolled". The main text states: "Electronic Payments and Statements (EPS) gives your organization the freedom to:" followed by a bulleted list of benefits: "Eliminate paper checks and receive electronic claims payments.", "Receive electronic remittance advices.", "Reconcile your claims quickly and more efficiently.", and "Create and download bundled daily 835 files, Payer PRA, and ePRAs in one easily retrievable zip file." Below this is a "News" section with an empty box.

## Payment Summary

- Payments display from the past 30 days as a default
- Select the Quick Search drop-down box to change payments display to the last 60 days or 90 days.
- Filter payments to view by National Provider Identifier (NPI) or TIN by choosing the appropriate selection in the 'Filter Payments' drop-down box located near the top of the page. (Applicable only if your organization designated payments by NPI number(s) during the EPS enrollment process. If you are already enrolled, but wish to designate future payments by NPI, please see page 19 for more information).
- Sort payments by selecting the arrow icon next to the column header. Arrow up indicates ascending order and arrow down descending order.
- View Remittance Details for a payment by locating the payment row and selecting the link for the corresponding Payment Number.
- Download a 835 file for a particular payment by selecting the link Download for the corresponding payment row.
- Print an electronic remittance advice (ERA) for a particular payment by selecting the link Print Request for the corresponding payment row. Adobe® Reader® is required to use this print feature. To download Adobe Reader, select the Adobe Reader icon.
- Print the entire Payment Summary page by selecting the button Print Payment Summary. From print preview, right click your mouse and choose the print command.
- View the Deposit Status of your payment. 'Successful ACH' will indicate your payment was sent electronically and has been deposited into your bank account. If your payment is returned, you will see a status of 'Failed'. You will be contacted by the EPS team to correct the issue relating to this payment or by hovering over the Failed status, you can obtain the appropriate number to call for assistance. If no resolution to issue by third business day, EPS will mark this payment as 'Successful Check' and you will be receiving a paper check from your Payer's bank. For VCP payments, you will see statuses of 'Issued' or 'Redeemed'. Once funds are redeemed for a VCP, a date will display in the Redemption Date column. In the event funds are not redeemed within 30 days, you will see status of 'Successful Check', as expired VCPs are then sent out as check payments.

**OPTUM™**  
Electronic Payments and Statements

Welcome, Mary Smith [Not You?](#)  
[Resources](#) | [Logout](#)

Home | **View Payments** | Search Remittance | Payer PSAs | Payment Data Files | Maintain Enrollment | Manage Users | My Profile | Billing Service Information

Payment Summary  
Organization: Test Organization

Filter Payments:  Show All  Last 30 days

Payer	Payment Date	NPI	Payment Number	Proxy Number	Amount	Type	Download 835	Print ERA	Payment Status / Trace Number	Redemption Date
UHC	02/06/2013	12553162786	1234567890 Check #: 500103	123334444444	\$84.00	VCP	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful CHK	
UHC	02/08/2013	12553162786	1231231233	123456789044	\$85.00	VCP	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Redeemed	6/30/2014
UHC	02/10/2013	12553162786	3456755555	123334444333	\$86.00	VCP	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Issued	
Pinnacle	02/06/2013	12553162786	8888888888		\$86.00	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH 1234567890123456	
Pinnacle	02/08/2013	12553162786	8888888888		\$86.00	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH 9876543210987654	
Pinnacle	02/10/2013	12553162786	7777777777		\$86.00	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH 1111111111111111	
Medica	02/06/2013	12553162777	6666666666		\$86.00	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH 2222222222222222	
Medica	02/08/2013	12553162777	5555555555		\$86.00	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH 3333333333333333	
Medica	02/10/2013	12553162777	4444444444		\$86.00	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH 4444444444444444	

In order to print the ERA, you must have Adobe Reader installed on your machine. Please download [Adobe Reader](#) if it is not installed on your machine.

[Print Payment Summary](#)

[Privacy Policy](#) | [Terms of Use](#)  
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## Remittance Detail

After selecting the link **Payment Number** for a payment row, the **Remittance Detail** page will display all claims that are included in a particular payment

- Download a 835 file for a particular payment by selecting the button **Download 835**
- Print an electronic remittance advice (ERA) for a particular payment by selecting the button **Print Request**
- Return to Payment Summary by selecting the button **Return to Payment Summary**

- View **Additional Details** for a specific claim by selecting the **Claim Number** link for that claim
- View the **Explanation of a specific Adjustment Reason or Remark Code** by selecting the code link for that claim
- View a complete list of all Adjustment Reason and Remark Codes by selecting the column header link **Adj Reason Code or RMK Code**
- Print either the Adj Reason Code or RMK Code list by right clicking on the page and selecting print

- View any **Provider Level Adjustments (PLBs)** associated with a payment by selecting the last page and scrolling to the bottom of the page
- View PLBs by scrolling or, to view the full list without scrolling, select the button **Print Request** and print the last page



Welcome, Mary Smith [Hot You?](#)  
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Electronic Payments and Statements

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**Remittance Detail**


Organization: ABC PROVIDER GROUP      Payment Date: 03/28/2013      Payment Number: 1042645657      Payment Type: Direct Deposit  
 NPI: 1111111111

1 Next Previous First Page Last Page Page 1 of 1      Filter Claims [Show All](#)

Account Number	Patient Name / Patient ID		Subscriber ID/ Corrected ID		Rendering Provider		Claim #/ Claim Type			Gross Policy Number / Product Name		
	Date(s) of Service	Description of Service	Amount Charged	Not Covered	Prov Adj Discount	Amount Allowed	Deduct/ Coins/ Copay	Amount Paid	Adj Reason Code		RMK Code	Patient Resp
55555556		JOHN DOE/ 111222333			111222333/ 555666999					<a href="#">RAM0091440041</a>		82075/ AARP MCARECOMPL CHOICE PL AN 2
	09/20/2012 - 09/20/2012	HC.G0202.TC	\$219.50	-\$124.50	--	\$95.00	-\$38.00	\$57.00	45_3			\$38.00
<b>Subtotal</b>			<b>\$219.50</b>	<b>-\$124.50</b>	<b>\$0.00</b>	<b>\$95.00</b>	<b>-\$38.00</b>	<b>\$57.00</b>				<b>\$38.00</b>
111222333		CLAIRE SMITH/ 999999999			999999999/ 777777777					<a href="#">RAM0091440042</a>		82075/ AARP MCARECOMPL CHOICE PL AN 2
	09/20/2012 - 09/20/2012	HC.77080	\$252.50	-\$181.90	--	\$70.60	-\$28.24	\$42.36	45_3			\$28.24
<b>Subtotal</b>			<b>\$252.50</b>	<b>-\$181.90</b>	<b>\$0.00</b>	<b>\$70.60</b>	<b>-\$28.24</b>	<b>\$42.36</b>				<b>\$28.24</b>
99955777		PAUL JONES/ 333333333			333333333					<a href="#">OEB0093053594</a>		12350/ ALCATEL-LUCENT FRR UNION
	10/02/2012 - 10/02/2012	HC.G0202.TC	\$219.50	-\$124.50	--	\$95.00	--	\$95.00	45			--
<b>Subtotal</b>			<b>\$219.50</b>	<b>-\$124.50</b>	<b>\$0.00</b>	<b>\$95.00</b>	<b>\$0.00</b>	<b>\$95.00</b>				<b>\$0.00</b>

**Total Paid to Provider: \$194.36**

\*\*\* indicates payer has not supplied this information.


 In order to print the ERA, you must have Adobe Reader installed on your machine. Please download [Adobe Reader](#) if it is not installed on your machine.

[Download 835](#)    [Print Request](#)    [Return to Payment Summary](#)



## Print Electronic Remittance Advice

- Print an electronic remittance advice by selecting either **Print** or **Print Request** (ERAs that exceed 2500 pages can be made available for printing by clicking the **Print Request** link)Download dialog box will appear; select the button **Open**
- Adobe Reader will open and display the ERA
- Select the **Print** icon to print the ERA
- Adobe Reader is required to use this print feature

To download Adobe Reader, select the Adobe Reader icon located on the bottom left-hand corner of the screen

The screenshot shows the Optum Electronic Payments and Statements interface. A 'File Download' dialog box is open, asking 'Do you want to open or save this file?'. The file details are: Name: 123456789\_1042645657.20130328.pdf, Type: Adobe Acrobat Document, From: ppsp-stage-e.optumhealthfinancial.com. The dialog has 'Open', 'Save', and 'Cancel' buttons. In the background, a table of payment data is visible with columns for Payer, Payment Date, NPI, Download 835, Print EPRA, and Deposit Status.

Payer	Payment Date	NPI	Download 835	Print EPRA	Deposit Status
UnitedHealthcare	03/28/2013	1154321545	<a href="#">Download 835</a>	<a href="#">Print Available</a>	Successful ACH
UnitedHealthcare	03/28/2013	1154321545	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	03/28/2013	1154321545	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	03/28/2013	1154321545	<a href="#">Download 835</a>	<a href="#">Print Request</a>	N/A
UnitedHealthcare	03/25/2013	1154321545	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	03/12/2013	1154321545	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH

## Download 835 file Save 835 file

- Download the 835 file by selecting **Download 835** from the Download 835 column. Download dialog box will appear. Select **Save**
- The 835 file is now available to upload to your Practice Management System

The screenshot shows the Optum Electronic Payments and Statements interface. A 'File Download' dialog box is open, asking 'Do you want to save this file, or find a program online to open it?'. The file details are: Name: 1042645657.dat, Type: Unknown File Type, From: ppsp-stage-e.optumhealthfinancial.com. The dialog has 'Find', 'Save', and 'Cancel' buttons. In the background, a table of payment data is visible with columns for Payer, Payment Date, Type, Download 835, Print EPRA, and Deposit Status.

Payer	Payment Date	Type	Download 835	Print EPRA	Deposit Status
UnitedHealthcare	03/28/2013	DD	<a href="#">Download 835</a>	<a href="#">Print Available</a>	Successful ACH
UnitedHealthcare	03/28/2013	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	03/28/2013	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	03/28/2013	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	N/A
UnitedHealthcare	03/25/2013	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	03/12/2013	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH

## Open 835 file

- Download the 835 file by selecting the link **Download 835** from the Download 835 column
- Download dialog box will appear and select the button **Find**

The screenshot shows the Optum Electronic Payments and Statements interface. A 'File Download' dialog box is open, asking to save a file named '1042645657.dat' from 'ppsp-stage-e.optumhealthfinancial.com'. The background shows a payment summary table with columns for 'Type', 'Download 835', 'Print EPRA', and 'Deposit Status'. The 'Download 835' column contains blue links for each row.

Type	Download 835	Print EPRA	Deposit Status
DD	<a href="#">Download 835</a>	<a href="#">Print Available</a>	Successful ACH
DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	N/A
DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH

- Depending on which Windows operation System is running on your computer, a new window will open with information on software available to open your file.
- Select from software available to open your .dat file.
- Open With dialog box will appear, under Recommended Programs. Select Notepad, and then select OK

The screenshot shows a Windows Internet Explorer browser window displaying the 'Windows File Association' page. The page shows information about the file type 'Data File' with the extension '.dat'. It lists software or information available at the bottom, including 'WordPerfect Office' and 'Free File Viewer'.

**File Type:** Data File  
**File Extension:** .dat  
**Description:** A wide range of applications create files with this file extension but with different file formats. The application(s) listed below may not work on your file.  
**Software or information available at:**


- [WordPerfect Office](#)
- [Free File Viewer](#)

## Claim Detail

After selecting the link **Claim Number** for a payment row, the **Claim Detail** page will display all service level and adjustment information for a single claim

- Each adjustment will display on a row corresponding to the appropriate service

- Print the Claim Detail by selecting the button **Print Claim Detail**
- Return to the Remittance Detail by selecting the button **Return to Remittance Detail**



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### Electronic Payments and Statements

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View Payments
Search Remittance
Payer PRAs
Payment Data Files
Maintain Enrollment
My Profile


#### Claim Detail

Organization: ABC PROVIDER GROUP      Payment Date: 03/28/2013      Payment Number: 1042645857      Payment Type: Direct Deposit  
 NPI: 1111111111

Account Number		Patient Name/ Patient ID		Subscriber ID/ Corrected ID		Rendering Provider		Claim #			Group Policy Number/ Product Name
Date(s) of Service	Description of Service	Amount Charged	Not covered	PROV Adj Discount	Amount Allowed	Deduct/ Coins/ Copay	Amount Paid	AIR Reason Code	RMK Code	Patient Resp	
55555555		JOHN DOE/ 111222333		111222333/ 555666999				RAM0091440041			82075/ AARP MCARECOMPL CHOICE PL AN 2
09/20/2012 - 09/20/2012	HC:G0202:TC	\$219.50			\$95.00		\$57.00				
			-\$124.50	--			--		4E		--
			--	--			-\$38.00		3		\$38.00
							<b>Service Subtotal:</b>	<b>\$57.00</b>			

**Total Claim Paid: \$57.00**

\*\*\* indicates payer has not supplied this information.

 In order to print the Claim, you must have Adobe Reader installed on your machine. Please download [Adobe Reader](#) if it is not installed on your machine.

Return to Remittance Detail    Print Claim Detail

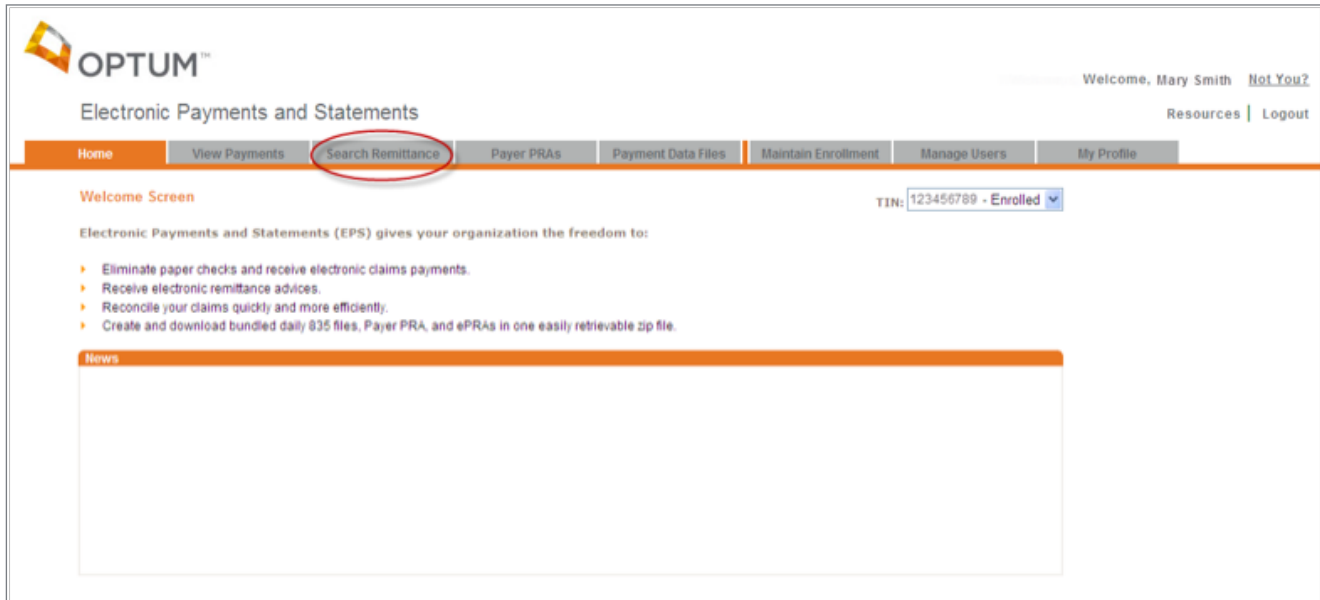
# Search Remittance

Payment and claim search using Electronic Payments and Statements

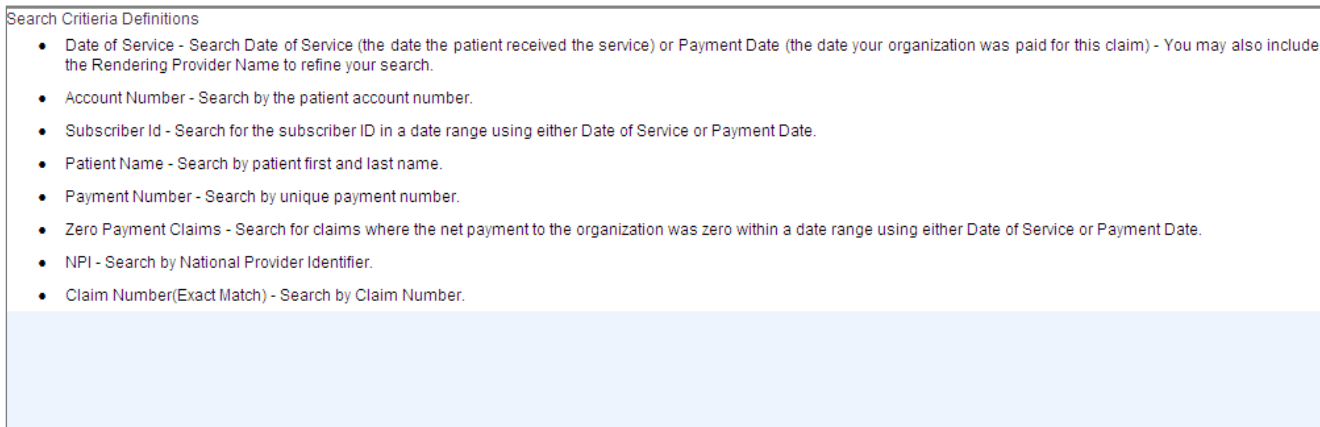
- Select the link **Search Remittance** to display eight search options

- Search for payments and claims by Date(s) of Service, Account Number, Subscriber ID, Patient Name, Payment Number, Zero Payment Claims, National Provider Identifier (NPI), or Claim Number

- Use Search Remittance to look up claim data for the past 13 months
- Select the radio button for the search option desired



- **Search Criteria Definitions** are available for more information by selecting **Click here** link



## Search by Date(s) of Service

- Select the radio button for **Date of Service**
- Select **Calendar icon** to enter the Start Date and End Date
- Optional Secondary Search is to enter the **Rendering Provider Last Name**
- **Reset/Clear Search** at anytime by selecting a different radio button or by selecting the button **Search Remittance**

The screenshot shows the Optum Electronic Payments and Statements search interface. The user is logged in as Mary Smith. The search criteria are set to "Date(s) of Service". The TIN is 123456789 - Enrolled. The search options include Date(s) of Service, Account Number, Subscriber ID, Patient Name, Payment Number, Zero Payment Claims, NPI, and Claim Number (Exact Match). The date type is set to "Date(s) of Service". The start and end date fields are empty, with calendar icons. A secondary search field for "Rendering Provider Last Name" is also empty. A "Search Remittance" button is visible.

NOTE : Payment Number and NPI are the only search parameters available for Capitation Payments.  
 + Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers.

## Search by your Patient Account Number

- Select the radio button for **Account Number**
- Enter **Account Number**
- Optional Secondary Search options available by Date of Service or Payment Date

The screenshot shows the Optum Electronic Payments and Statements search interface. The user is logged in as Mary Smith. The search criteria are set to "Account Number". The TIN is 123456789 - Enrolled. The search options include Date(s) of Service, Account Number, Subscriber ID, Patient Name, Payment Number, Zero Payment Claims, NPI, and Claim Number (Exact Match). The date type is set to "Date(s) of Service". The account number field is empty. The start and end date fields are empty, with calendar icons. A secondary search field is present but empty. A "Reset Dates" button and a "Search Remittance" button are visible.

NOTE : Payment Number and NPI are the only search parameters available for Capitation Payments.  
 + Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers.

## Search by Subscriber ID

- Select the radio button for **Subscriber ID**
- Enter **Subscriber ID**
- Optional Secondary Search options available by Date of Service or Payment Date

The screenshot shows the Optum Electronic Payments and Statements search interface. The user is logged in as Mary Smith. The search criteria are set to "Subscriber ID" with the value "123456789 - Enrolled". The secondary search options are "Date(s) of Service" and "Payment Date".

**Organization:** ABC PROVIDER GROUP  
**TIN:** 123456789 - Enrolled

Please search for claims using one of the following options (for more information, click [here](#))

Date(s) of Service  Account Number  Subscriber ID  Patient Name  Payment Number  Zero Payment Claims  NPI  Claim Number (Exact Match)

Subscriber ID:

**Secondary Search (Optional)**

Choose Date Type:	Start Date	End Date
<input checked="" type="radio"/> Date(s) of Service	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="MM/DD/YYYY"/>
<input type="radio"/> Payment Date	<input type="text"/>	<input type="text"/>

NOTE: Payment Number and NPI are the only search parameters available for Capitation Payments.  
 + Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers.

## Search by Patient Name

- Select the radio button for **Patient Name**
- Enter **Patient Last Name and First Name**
- Optional Secondary Search options available by Date of Service or Payment Date

The screenshot shows the Optum Electronic Payments and Statements search interface. The user is logged in as Mary Smith. The search criteria are set to "Patient Name" with the value "123456789 - Enrolled". The secondary search options are "Date(s) of Service" and "Payment Date".

**Organization:** ABC PROVIDER GROUP  
**TIN:** 123456789 - Enrolled

Please search for claims using one of the following options (for more information, click [here](#))

Date(s) of Service  Account Number  Subscriber ID  Patient Name  Payment Number  Zero Payment Claims  NPI  Claim Number (Exact Match)

**Patient Name**

Last Name	First Name
<input type="text"/>	<input type="text"/>

**Secondary Search (Optional)**

Choose Date Type:	Start Date	End Date
<input checked="" type="radio"/> Date(s) of Service	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="MM/DD/YYYY"/>
<input type="radio"/> Payment Date	<input type="text"/>	<input type="text"/>

NOTE: Payment Number and NPI are the only search parameters available for Capitation Payments.  
 + Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers.

## Search by Payment Number

- Select the radio button for **Payment Number**
- Select radio button for **Check Number** or **Electronic Payment Number**
- Enter **Payment Number**

The screenshot shows the OPTUM Electronic Payments and Statements interface. The user is logged in as Mary Smith. The navigation menu includes Home, View Payments, Search Remittance (highlighted), Payer PRAs, Payment Data Files, Maintain Enrollment, Manage Users, and My Profile. The Search Remittance section is active, showing the Organization as ABC PROVIDER GROUP and TIN as 123456789 - Enrolled. The search options are: Date(s) of Service, Account Number, Subscriber ID, Patient Name, Payment Number (selected), Zero Payment Claims, NPI, and Claim Number (Exact Match). Under the Payment Number section, the user has selected the Check Number radio button and entered a value in the adjacent text box. The Electronic Payment Number radio button is unselected. A Search Remittance button is located at the bottom right. A note at the bottom states: "NOTE: Payment Number and NPI are the only search parameters available for Capitation Payments. \* Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers."

## Search by Zero Payment Claims

- Zero Payment Claims refers to adjustment claims or denied claims
- Select the radio button for either **Date of Service** or **Payment Date**
- Optional Secondary Search is to enter the **Patient's Last Name**
- Select the radio button for **Zero Payment Claims**
- Select the **Calendar icon** to enter the Start Date and End Date

The screenshot shows the OPTUM Electronic Payments and Statements interface. The user is logged in as Mary Smith. The navigation menu is the same as in the previous screenshot. The Search Remittance section is active, showing the Organization as ABC PROVIDER GROUP and TIN as 123456789 - Enrolled. The search options are: Date(s) of Service, Account Number, Subscriber ID, Patient Name, Payment Number, Zero Payment Claims (selected), NPI, and Claim Number (Exact Match). Under the Zero Payment Claims section, the user has selected the Date(s) of Service radio button. The Start Date and End Date fields are populated with MM/DD/YYYY and include calendar icons. The Payment Date radio button is unselected. A Secondary Search (Optional) section is visible with a Patient Last Name text box. A Search Remittance button is located at the bottom right. A note at the bottom states: "NOTE: Payment Number and NPI are the only search parameters available for Capitation Payments. \* Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers."



## Search by National Provider Identifier (NPI)

- If your organization is directing payments to multiple checking accounts under a single Tax Identification Number (TIN), you can view payments by NPI
- Select the radio button for **NPI**
- Select the radio button for either the **Date of Service** or **Payment Date**
- Select the **Calendar icon** to enter the Start Date and End Date

The screenshot shows the Optum Electronic Payments and Statements search interface. The user is logged in as Mary Smith. The search criteria are set to "Search Remittance" for Organization: ABC PROVIDER GROUP and TIN: 123456789 - Enrolled. The search options include Date(s) of Service, Account Number, Subscriber ID, Patient Name, Payment Number, Zero Payment Claims, NPI (selected), and Claim Number (Exact Match). The NPI field is empty. The Secondary Search (Optional) section has a "Choose Date Type:" dropdown with "Date(s) of Service" selected and "Payment Date" as an option. The Start Date and End Date fields are empty with calendar icons. There are "Reset Dates" and "Search Remittance" buttons. A note at the bottom states: "NOTE: Payment Number and NPI are the only search parameters available for Capitation Payments. \* Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers."

## Search by Claim Number

- Select the radio button for **Claim**
- Enter **Claim Number**

The screenshot shows the Optum Electronic Payments and Statements search interface. The user is logged in as Mary Smith. The search criteria are set to "Search Remittance" for Organization: ABC PROVIDER GROUP and TIN: 123456789 - Enrolled. The search options include Date(s) of Service, Account Number, Subscriber ID, Patient Name, Payment Number, Zero Payment Claims, NPI, and Claim Number (Exact Match) (selected). The Claim Number field is empty. There is a "Search Remittance" button. A note at the bottom states: "NOTE: Payment Number and NPI are the only search parameters available for Capitation Payments. \* Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers."

## Search Results

- Displays claims that match the chosen search criteria
- Select the link Payment Number to view the Remittance Details
- Select the Claim Number link to view the Claim Details
- Select button Print Search Results to print information
- Print preview page displays and then right click and choose the Print Command
- Select button New Search to begin a new search



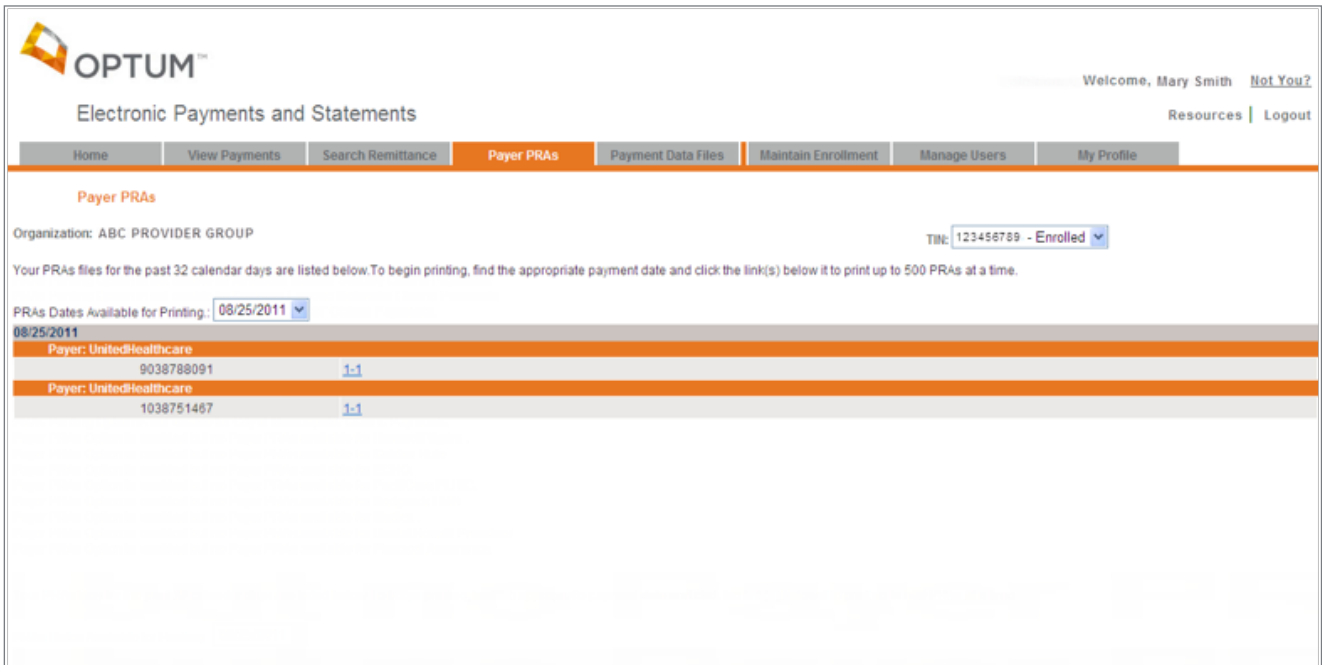
# Payer PRAs View and Print

- From the EPS Welcome Page, select the Payer PRAs tab
- You may view and print up to 500 Payer PRAs at a time
- Individual PRAs for the past 15 business days are available using the Payer PRAs feature.



## PRA Printing

- Locate the desired payment date
- Select the link segment to open the PRA files for that payment date (Payer PRA files are available for the past 15 business days)



- Payer PRAs processing screen displays while PRAs are downloading from the server
- Upon completion of download, Adobe Reader will launch containing up to 500 PRAs
- Select the **Calendar icon** to enter the Start Date and End Date

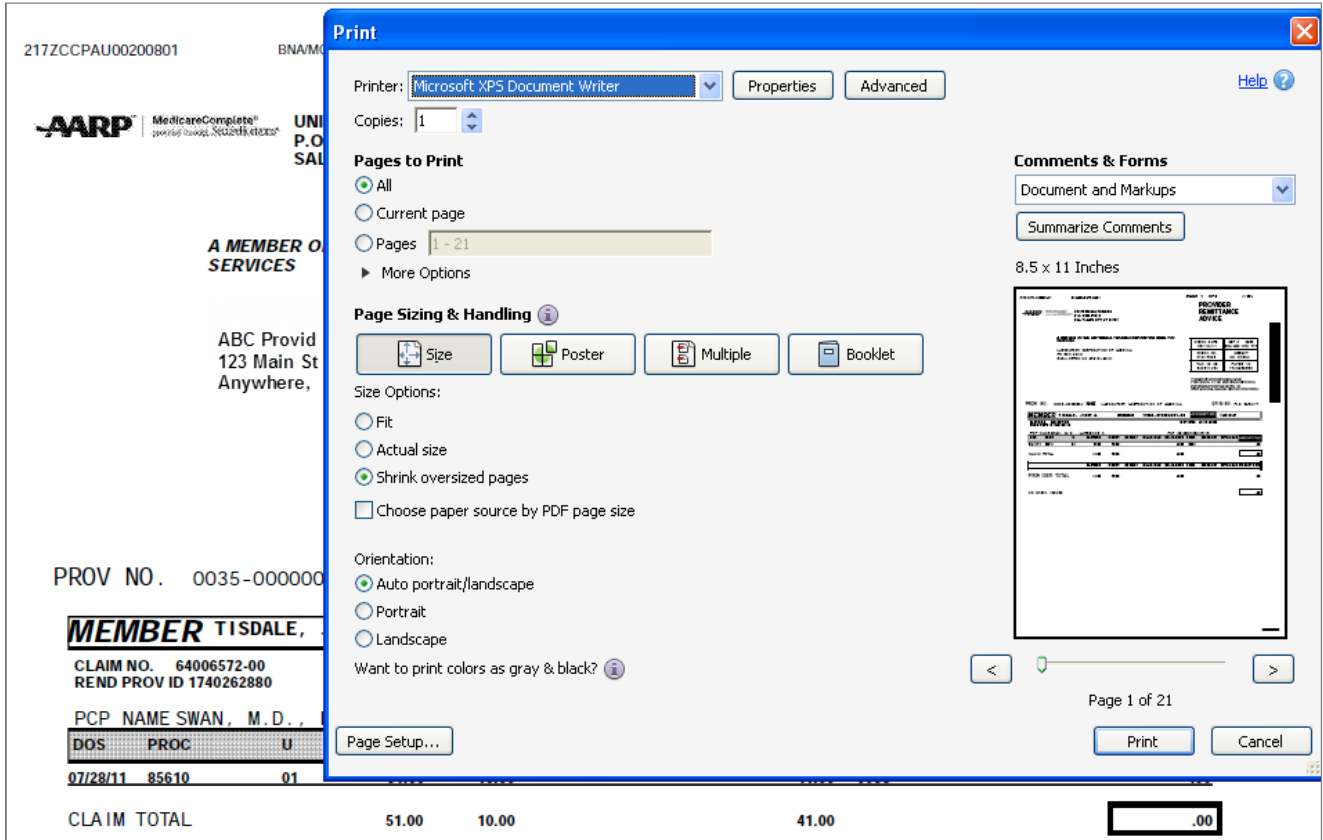
The screenshot shows the Optum Electronic Payments and Statements interface. At the top left is the Optum logo. The page title is "Electronic Payments and Statements". On the right, it says "Welcome, Mary Smith" with a "Not You?" link, and "Resources | Logout". A navigation bar includes "Home", "View Payments", "Search Remittance", "Payer PRAs" (highlighted), "Payment Data Files", "Maintain Enrollment", "Manage Users", and "My Profile".

The main content area is titled "Payer PRAs". It shows "Organization: ABC PROVIDER GROUP" and "Your PRAs files for the past 32 calendar days are listed below. To begin printing, click on the calendar icon." A dropdown menu shows "PRAs Dates Available for Printing: 08/25/2011". A table lists PRAs with columns for "Payer: UnitedHealthcare", "ID", and "Action".

Payer: UnitedHealthcare	ID	Action
9038788091	1-1	
1038751467	1-1	

A "File Download" dialog box is open in the center, asking "Do you want to open or save this file?". The file details are: Name: 87726.111187726.9038788091.1.1.pdf, Type: Adobe Acrobat Document, From: ppsp-stage-e.optumhealthfinancial.com. Buttons for "Open", "Save", and "Cancel" are visible. A security warning at the bottom of the dialog reads: "While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?"

- Select the **Print icon** and '**OK**' to print the PRAs
- The Print All PRA page is still open behind in a separate window. You can print additional PRA files, if required
- To close Adobe Reader, select the **Close Window "X" box** on the upper right corner



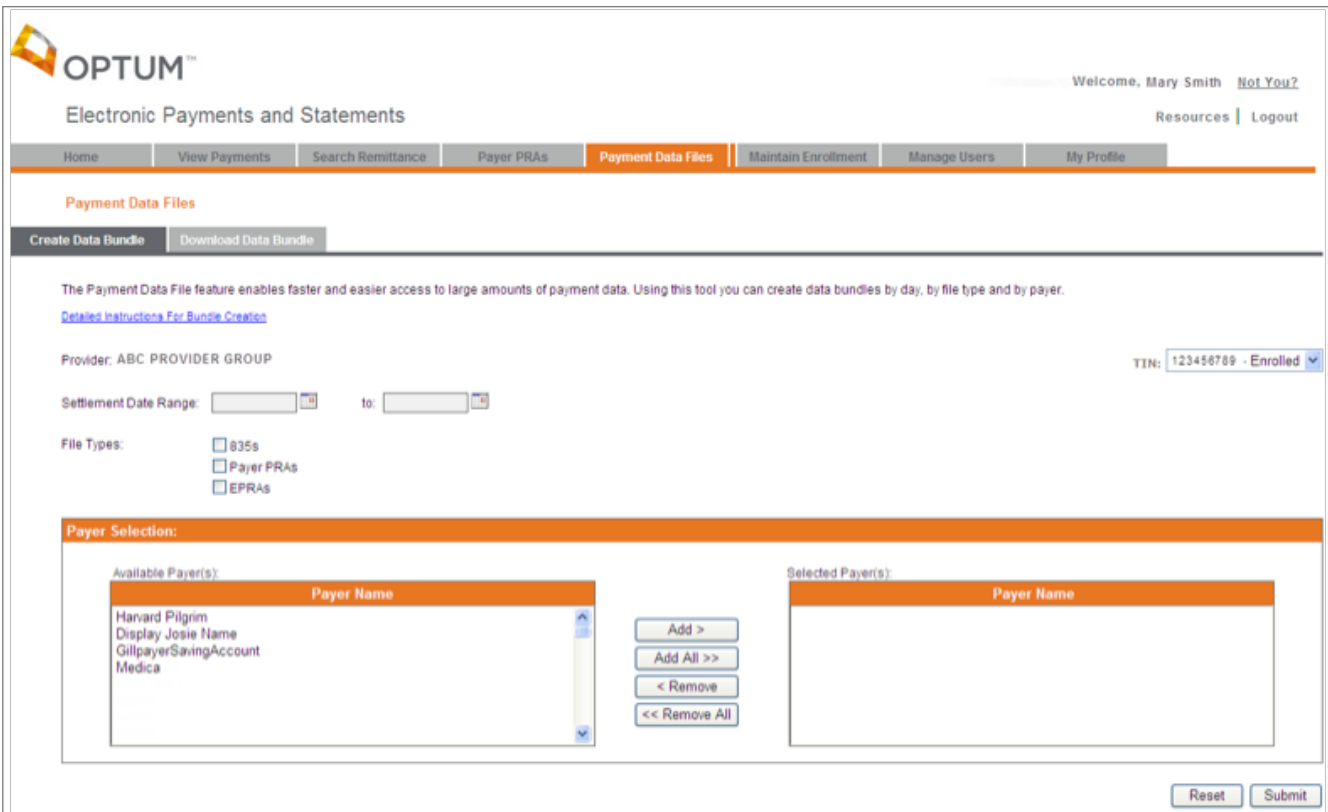
# Payment Data Files

- From the EPS Welcome Page, select the Payment Data Files tab
- You can request and download bundled 835 files, Payer PRAs and ePRAs in one centralized location



## Create Data Bundle

- Select the desired Settlement Date or Date Range, File Type(s) and Payer(s) to include in your data bundle request



- You will receive an online message indicating that your request was successfully submitted
- When processing is complete for the requested data bundle(s), you will receive an email notification that your data bundle is available for download

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Electronic Payments and Statements

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Home | View Payments | Search Remittance | Payer PRAs | **Payment Data Files** | Maintain Enrollment | Manage Users | My Profile

**Payment Data Files**

Create Data Bundle | Download Data Bundle

The Payment Data File feature enables faster and easier access to large amounts of payment data. Using this tool you can create data bundles by day, by file type and by payer.  
[Detailed Instructions For Bundle Creation](#)

Provider: ABC PROVIDER GROUP TIN: 123456789 - Enrolled

Your bundle has been successfully submitted.

Settlement Date Range: [ ] to: [ ]

File Types:  
 E35s  
 Payer PRAs  
 EPRAs

**Payer Selection:**

Available Payer(s):

Payer Name
Harvard Pilgrim
Display Josie Name
GillpayerSavingAccount
Medica

Selected Payer(s):

Payer Name

Buttons: Add >, Add All >>, < Remove, << Remove All

Reset Submit

## Download Data Bundle

- Each requested data bundle is displayed in the order in which it was created
- Upon selecting 'Download', a zipped file will be presented containing separate folders for each payer
- Data bundles are available for download for 7 days

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**Payment Data Files**

Create Data Bundle | Download Data Bundle

Each Payment Data File will be listed below in order of when the data bundle was created, along with the selected data elements. Payment Data Files will be available for download for 7 days with the expiration date listed for each bundle.

TIN	Provider Name	Bundle File Name	Status	File Create Date	Available Through	Selected Date Range	File Details	Size
123456789	ABC PROVIDER GROUP		In Progress			04/03/2013 - 04/04/2013	<a href="#">View Bundle Detail</a>	
123456789	ABC PROVIDER GROUP	FileName	Download	04/02/2013	04/09/2013	04/01/2013 - 04/02/2013	<a href="#">View Bundle Detail</a>	

# Maintain Enrollment

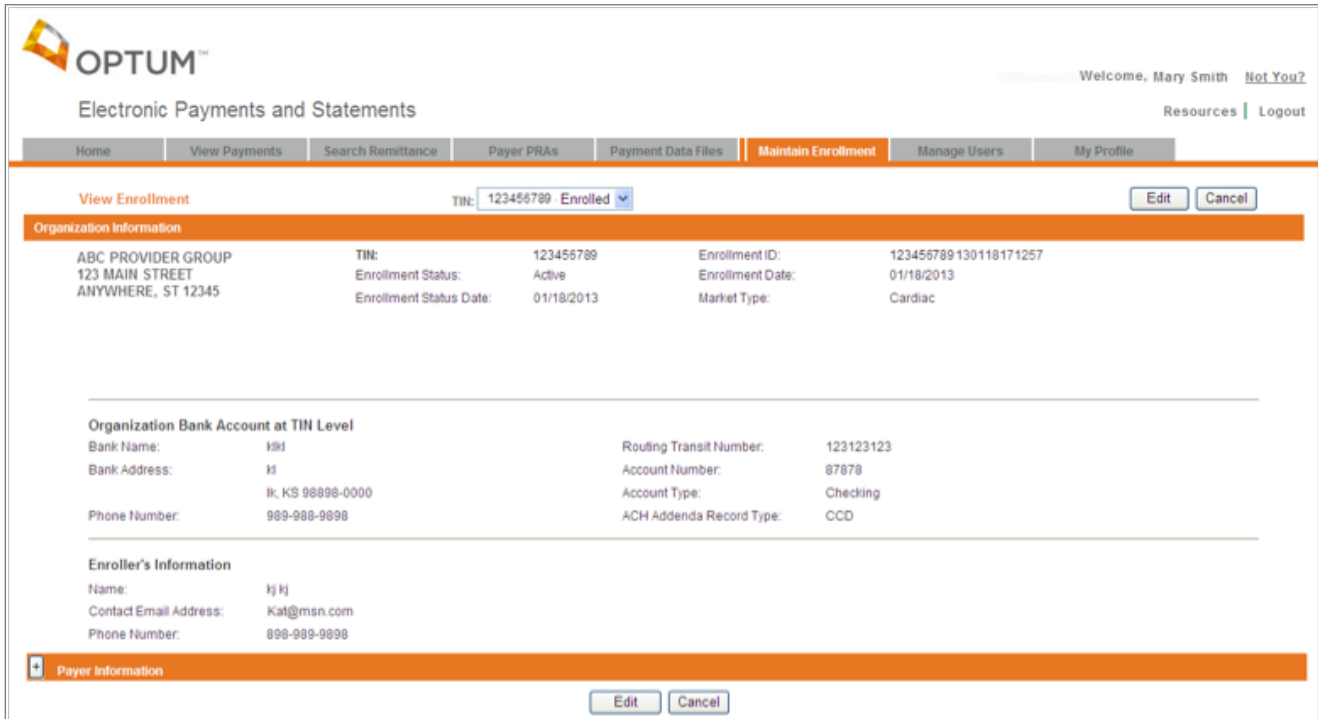
The **Maintain Enrollment** feature allows you to view or update existing enrollment details for an organization.

- To view current enrollment information for an organization select **Maintain Enrollment**



## From the Organization Information page

- Select **Edit** to begin updates



## Organization Tab

- Enter changes to Organization Information. Then click **Continue** to continue making changes, **Cancel** to cancel changes, or **Finish** if changes are complete

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Electronic Payments and Statements Resources | Logout

Home View Payments Search Remittance Payer PRAs Payment Data Files **Maintain Enrollment** Manage Users My Profile

Online Enrollment Form [Continue](#) [Cancel](#) [Finish](#)

Organization	Payer(s)	Bank Accounts	NPI	NPI Bank Account
--------------	----------	---------------	-----	------------------

Sections denoted with an \* are required for enrollment.

**\*Organization Information**

Organization Name:	ABC PROVIDER GROUP	TIN:	123456789
Address:	123 MAIN STREET	Enrollment ID:	123456789130118171257
City:	ANYWHERE	Enrollment Date:	01/18/2013
State:	ST Zip: 12345 0000	Enrollment Status:	Active
		Enrollment Status Date:	01/18/2013
		Market Type:	<input type="checkbox"/> Behavioral Health <input checked="" type="checkbox"/> Cardiac <input type="checkbox"/> Dental <input type="checkbox"/> Medical <input type="checkbox"/> Vision

Please refer to the Manage Users tab to view or edit users.

[Continue](#) [Cancel](#) [Finish](#)

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## Payers Tab

- Update the Payment Method for a specific Payer by clicking on the Payment Method dropdown and selecting a payment method.

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Resources

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**Edit Enrollment** Continue Cancel Finish

Organization Payer(s) Bank Accounts NPI NPI Bank Account

Electronic Payments and Statements (EPS) enables you to choose the payment option that's right for your practice, with the flexibility to choose between two types of electronic payments; ACH (also known as direct deposit) and Payments. Please note, not all Payers will offer Virtual Card Payments.

ACH payments are deposited direct to your bank account, while Virtual Card Payments are processed via your point of sale terminal, similar to the way a patient co-pay is processed today in your practice.

- If you are changing from VCP Only to an ACH option you will need to provide your bank routing and account number along with supporting documentation to facilitate the payment method change.
- If you select a payment type of 'None' you will no longer receive electronic payments of any kind. Please note that it may take up to 30 days to process your request to no longer receive electronic payments.

Payer Information		Payer Offers	Payment Method
Payer Name	Payer Id		
AARP - Bad 5010 Payer	MOR55	ACH/VCP	ACH
AARP United-Healthcare Ins Co	36273	ACH	ACH
Payer 123	81400	ACH	ACH
Payer ABC Affiliate	12345	ACH/VCP	ACH
Payer MNO Affiliate	45666	ACH	ACH
Payer XYZ Affiliate	77777	ACH	ACH
*UMR	87655	ACH	ACH

\* Note: We cannot support VCP for State of Missouri under UMR at this time.  
 \* Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers.

Reset Update Payment Methods

Continue Cancel Finish

## Bank Accounts Tab

- To update Organization Bank Account(s) Information, from the 'Resources' menu, select 'Contact Us' for EPS Support information
- Note: Changes to Organization Bank Account(s) Information must be submitted in writing
- Click **Continue** to continue making changes, **Cancel** to cancel changes or **Finish** if changes are complete

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**Edit Enrollment** Continue Cancel Finish

Organization Payer(s) **Bank Accounts** NPI NPI Bank Account

To update organization Bank Accounts information, please call 1-877-620-6194.

**Organization Bank Account at TIN Level**

Bank Name:	Bank of America	Routing Transit Number:	123123123
Bank Address:	987 Main Street Ik, KS 98898-0000	Account Number:	87878
Phone Number:	989-988-9898	Account Type:	Checking
		ACH Addenda Record Type:	CCD

Continue Cancel Finish



## National Provider Identifier Tab

- To update EPS payments at the National Provider Identifier (NPI) information, from the 'Resources' menu, select 'Contact Us' for EPS Support information
- Note: Changes to NPI information must be submitted in writing
- Click **Continue** to continue making changes, **Cancel** to cancel changes or **Finish** if changes are complete

The screenshot shows the Optum Electronic Payments and Statements interface. The user is logged in as Mary Smith. The 'Maintain Enrollment' tab is selected in the navigation bar. Below the navigation bar, there is a sub-navigation bar with tabs for 'Organization', 'Payer(s)', 'Bank Accounts', 'NPI', and 'NPI Bank Account'. The 'NPI' tab is currently active. The main content area displays the message: 'No NPIs have been added to this enrollment.' Below this message, there is a link to 'Manage Users' and a set of buttons: 'Continue', 'Cancel', and 'Finish'.

## NPI Bank Accounts Tab

- To update EPS payments at the National Provider Identifier (NPI) level to separate NPI Bank accounts, from the 'Resources' menu, select 'Contact Us' for EPS Support information
- Note: Changes to NPI information must be submitted in writing
- Click **Cancel** to cancel changes or **Finish** to finish changes

The screenshot shows the Optum Electronic Payments and Statements interface. The user is logged in as Mary Smith. The 'Maintain Enrollment' tab is selected in the navigation bar. Below the navigation bar, there is a sub-navigation bar with tabs for 'Organization', 'Payer(s)', 'Bank Accounts', 'NPI', and 'NPI Bank Account'. The 'NPI Bank Account' tab is currently active. The main content area displays the message: 'No NPI Bank Accounts have been added to this enrollment.' Below this message, there is a set of buttons: 'Cancel' and 'Finish'.

## Review Edits to Organization Information

After selecting Finish on any of the previous pages, you will be returned to the Organization Information page

- If more changes are necessary, select **Edit**
- If information is correct, select **Submit**

- Click **Cancel** to exit Maintain Enrollment without saving any changes

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Online Enrollment Form: Verification

Please verify the information below and submit.

**Organization Information**

ABC PROVIDER GROUP 123 MAIN STREET ANYWHERE, ST 12345	TIN: 123456789
Market Type: Cardiac	

**Payer Information**

## Print Enrollment Form

- Select **Print Enrollment Form**

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Online Enrollment Form: Enrollment Completed Successfully

Thank you!  
You have successfully completed the enrollment application for EPS. If you would like an electronic copy of this application please select the "Print Enrollment Form" button **now** to print or save a copy.

At this time you may print your updates.

\*Note: If this was a reactivation of a previously inactive TIN and you would like to view the existing NPI information please click on the 'Maintain Enrollment' tab above. If this is a new enrollment and you would like to add NPI information please contact the EPS Support Center at 877-620-6194 prompt 1.

\*\*Note: To reprint an enrollment form, please select the TIN and then select the Edit option. Then select Finish and then Submit, even if no changes were made. At that time a "Print Enrollment Form" button will appear on the following screen.

If your enrollment or account maintenance is complete please proceed to the Home Page.

In order to print the EPS Enrollment Form, you must have AdobeReader installed on your computer.

Please download [Adobe Reader](#) if it is not installed on your machine.

# Manage Users

- From the EPS Welcome Page, select the Manage Users tab
  - You can add, edit or delete users from your Organization for EPS Optum portal access
- Note:** This tab will only appear for Administrator access. Tab will not display for General users.



## View and Edit User

- The Manage Users feature allows the Administrator to view, add or delete their Organization's users for EPS Optum access.
- Selection of an individual from the User List populates the user's information within the data fields and the TIN grid below.
- Users active for EPS Optum portal access display under the User List.
- Administrator is able to view which TIN's the user is associated to, the user's access level (whether Administrator or General) and if they receive email notifications (for the TIN or specific TIN/NPI).

**Manage Users**

Welcome to Manage Users. As an Administrator for your organization, you have the ability to add, delete or edit user access for others in your organization that access Electronic Payment and Statements. When adding or editing a user, please select the appropriate access level for each user. In addition, Administrators also have the ability to assign General user access to specific TINs and email notification for NPIs associated with your organization TIN.

**User List**

- Smith, Sam
- Thomas, John

**Add User** [Save] [Cancel] [Delete User]

**\* Required Field**

\* First Name:  Status: Active

\* Last Name:

Middle Initial:

\* Phone Number:  -  -  Ext

\* Email Address:

\* Retype Email Address:

\* User Type:

\* Add TIN:

TIN	Provider Name	TIN Access Level	NPI	NPI Name	Email Notification	Remove TIN/NPI
123456789	ABC PROVIDER GROUP	Administrator			<input type="checkbox"/>	<input type="checkbox"/>

## Add User

- Selection of the Add User button, allows the Administrator to add a new user to their Organization.
- Upon entry of all required data and selection of Save, pre-registration materials will be triggered for the newly added user.
- A unique User Name will be created and emailed along with the pre-registration url for self-service registration to the EPS Optum portal.
- Upon the new user successfully completing their registration process, their name will then appear as an active user on the User List within the Manage Users tab.

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**Add User** Save Cancel

\* Required Field

\* First Name:

\* Last Name:

Middle Initial:

\* Phone Number: -- Ext:

\* Email Address:

\* Retype Email Address:

\* User Type:

\* Add TIN:

TIN ▲	Provider Name	TIN Access Level	NPI	NPI Name	Email Notification	Remove TIN/NPI

# My Profile

- From the EPS Welcome Page, select the My Profile tab
- You can manage your own EPS Optum portal profile information.



## My Profile View and Edit

- View your personal information and make any updates, as necessary.
- View all the TINs you are associated with, your access level for each of these TINs and whether or not you are enabled for email notifications.
- Change your password.
- Change your security questions.

The screenshot shows the 'My Profile' page in the Optum system. The page title is 'Electronic Payments and Statements'. The user is logged in as 'Mary Smith'. The navigation menu includes 'Home', 'View Payments', 'Search Remittance', 'Payer PRAs', 'Payment Data Files', 'Maintain Enrollment', 'Manage Users', and 'My Profile'. The 'My Profile' section contains a form with the following fields:

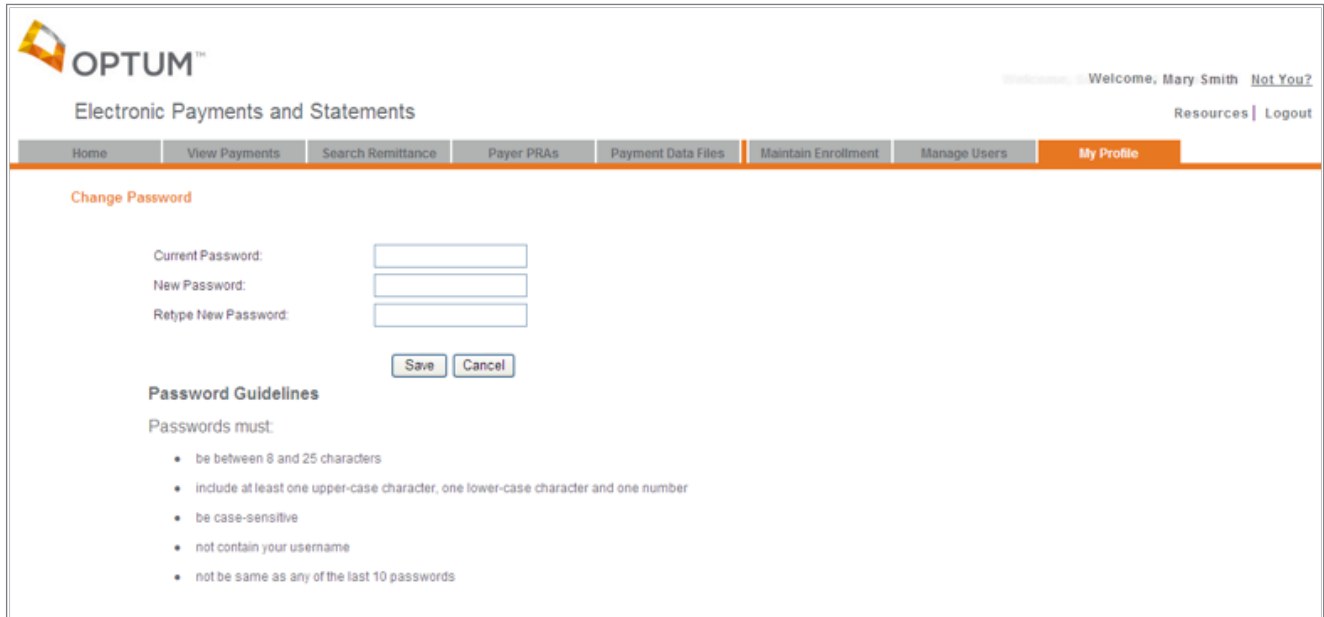
- User Name:** sasm1234
- Password:** Change Password
- Security Questions:** Manage Security Questions
- First Name:** Sam
- Last Name:** Smith
- Middle Initial:** A
- Phone Number:** 444-333-2222 Ext: 222
- Email Address:** sasmith@abcgrp.com
- Retype Email Address:** sasmith@abcgrp.com
- User Type:** Provider

Below the form is a table with the following columns: TIN, Provider Name, TIN Access Level, NPI, NPI Name, and Email Notification.

TIN	Provider Name	TIN Access Level	NPI	NPI Name	Email Notification
123456789	ABC PROVIDER GROUP	Administrator			<input type="checkbox"/>

## Change Password

- Follow password guidelines to change your password.
- Upon saving your new password, an email will be sent confirming your change.




The screenshot shows the Optum web interface for changing a password. At the top left is the Optum logo. The main header reads "Electronic Payments and Statements". On the right, it says "Welcome, Mary Smith" with a link for "Not You?". Below this is a navigation bar with links: Home, View Payments, Search Remittance, Payer PRAs, Payment Data Files, Maintain Enrollment, Manage Users, and My Profile (which is highlighted). The main content area is titled "Change Password" and contains three input fields: "Current Password:", "New Password:", and "Retype New Password:". Below these fields are "Save" and "Cancel" buttons. A section titled "Password Guidelines" lists the following requirements:

- be between 8 and 25 characters
- include at least one upper-case character, one lower-case character and one number
- be case-sensitive
- not contain your username
- not be same as any of the last 10 passwords



## View and Edit Security Questions

- Modify one or more of your security questions and answers.



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### Manage Security Questions

Below are your current Security Questions and Answers

\* Required Field

* Security Question 1	What was your childhood nickname?
* Security Answer 1	Blue
* Security Question 2	What was the make of your first car?
* Security Answer 2	Volvo
* Security Question 3	What is your main frequent flyer number?
* Security Answer 3	3434334
* Security Question 4	What was the name of your first pet?
* Security Answer 4	Spot
* Security Question 5	Where did you spend your childhood summers?
* Security Answer 5	Cape Cod

# Billing Service Information

- From the EPS Welcome Page, select the Billing Service Information tab

- On this tab, you have the ability to manage your Third Party Billing Service relationship(s)

**Note:** This tab will only appear for Administrator access. Tab will not display for General users.

The screenshot shows the Optum Electronic Payments and Statements (EPS) interface. At the top left is the Optum logo. The page title is "Electronic Payments and Statements". In the top right corner, it says "Welcome, Mary Smith" with a "Not you?" link, and "Resources | Logout" below it. A navigation menu contains several tabs: Home, View Payments, Search Remittance, Payer PRAs, Payment Data Files, Maintain Enrollment, Manage Users, My Profile, and Billing Service Information. The "Billing Service Information" tab is circled in red. Below the navigation menu, the page displays a "Welcome Screen" with a TIN dropdown menu set to "123456789 - Enrolled". The main content area includes a heading "Electronic Payments and Statements (EPS) gives your organization the freedom to:" followed by a bulleted list of benefits: "Eliminate paper checks and receive electronic claims payments.", "Receive electronic remittance advices.", "Reconcile your claims quickly and more efficiently.", and "Create and download bundled daily 835 files, Payer PRA, and ePRAs in one easily retrievable zip file." Below this is a "News" section with an empty content area.

## View Billing Service Information

- The Billing Service Information tab allows the Administrator to view billing service association(s) for your organization.
- The upper grid displays current active billing service(s) associated to your organization.
- The bottom left grid displays any pending billing service requests to access your payment information on EPS.
- The bottom right grid displays all historical billing service association activity for your organization.

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**Billing Service Information**

The Billing Service Information tab enables you to securely manage your Third Party Billing Service relationship(s).  
[Detailed instructions for Billing Service Information](#)

**Billing Service(s) currently associated to my Provider TIN(s)** (Click on column headings to re-sort information)

Provider TIN ▲	Name of Billing Service	Status	Effective Date	Anniversary	Remove	Renew for Additional Year	Termination Date
456789456	RMO Billing Service	Active	02/06/2013	02/06/2014	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
132345643	Tin's Chiropractic Billing	Active	02/01/2012	02/01/2013	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Pending Requests						
Provider TIN	Name of Billing Service	Request Date	Status	Approve	Deny	Effective Date
996789456	ABC Billing Service	02/06/2013	Request Expires in 10 days	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
334455666	FFF Billing Service	02/06/2013	Association Requested	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
332211678	GOG Billing Service	02/06/2013	Association Requested	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
564874875	RRR Billing Service	02/06/2013	Association Requested	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
MMM Billing	Association					

History						
Date ▲	Provider TIN	Name of Billing Service	Effective Date	End Date	Action Type	Name / Username
02/08/2013	996789456	ABC Billing Service			Association Requested	Paul James/james
02/06/2013	456789456	RMO Billing Service	02/06/2013		Request Approved	Dwight Howards / dhoward53
02/06/2013	564874875	FFF Billing Service			Association Requested	Toby Keith / tkeith
06/09/2012	345543456	RRR Billing Service	07/01/2012	06/09/2012	Request Expired	System

## Current Provider/Billing Service Association(s)

- Provider TIN and billing service information displays for all active association(s). This association allows billing service approved access to your payment information.
- Selecting the 'Remove' option will immediately remove the billing service association and they will no longer have access to your payment information.
- The 'Renew' option will become available 14 days prior to your scheduled anniversary date.
- Selecting this option will extend your active association to the billing service for another year.
- After reaching 14 days beyond your anniversary date and you have not renewed this association, the association will expire and the billing service will no longer have access to your payment information.
- The Termination Date option allows you to terminate your association to the billing service as of the current date or a date in the future.
- Association with future termination date will still allow billing service access to your payment information.
- After the termination date has been reached, the billing service will no longer have access to your payment information.

**OPTUM™** Welcome, Mary Smith [Not you?](#)

Electronic Payments and Statements [Resources](#) | [Logout](#)

Home View Payments Search Remittance Payer PRA's Payment Data Files Maintain Enrollment Manage Users My Profile **Billing Service Information**

**Billing Service Information**

The Billing Service Information tab enables you to securely manage your Third Party Billing Service relationship(s).

[Detailed instructions for Billing Service Information](#)

**Billing Service(s) currently associated to my Provider TIN(s)**

Click on column headings to re-sort information

Provider TIN ▲	Name of Billing Service	Status	Effective Date	Anniversary	Remove	Renew for Additional Year	Termination Date
456789458	RMO Billing Service	Active	02/06/2013	02/06/2014	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
132345643	Tim's Chiropractic Billing	Active	02/01/2012	02/01/2013	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

## Pending Billing Service Requests for Provider Association

- Billing services can request access to view your payment information. These requests will appear in the Pending Requests section.
- Selecting the 'Approve' option and corresponding Effective Date will create an active billing service association and allow them access to your payment information.
- Selecting the 'Deny' option will not allow the billing service access to your payment information.

Pending Requests						
Provider TID	Name of Billing Service	Request Date	Status	Approve	Deny	Effective Date
996789458	ABC Billing Service	02/08/2013	Request Expires in 10 days	<input type="checkbox"/>	<input type="checkbox"/>	
334455888	FFF Billing Service	02/06/2013	Association Requested	<input type="checkbox"/>	<input type="checkbox"/>	
332211678	GGG Billing Service	02/06/2013	Association Requested	<input type="checkbox"/>	<input type="checkbox"/>	
564874875	RRR Billing Service	02/06/2013	Association Requested	<input type="checkbox"/>	<input type="checkbox"/>	
	MMM Billing		Association			

## Historical Provider/Billing Service Associations

- History displays all billing service association activity for your organization.
- Activities include:
  - Association Requested
  - Request Denied
  - Request Approved
  - Request Expired
  - Terminated
  - Renewed for another Year
  - Renewal Expired
  - Association Removed
  - Active

History						
Date	Provider TID	Name of Billing Service	Effective Date	End Date	Action Type	Name / Username
02/08/2013	996789458	ABC Billing Service			Association Requested	Paul James/pjames
02/06/2013	458789458	RMO Billing Service	02/06/2013		Request Approved	Dwight Howard / dhoward33
02/06/2013	564874875	FFF Billing Service			Association Requested	Toby Keith / tkeith
06/09/2012	345543456	RRR Billing Service	07/01/2012	06/09/2012	Request Expired	System

## Search/Add Billing Services

- You have the ability to search and associate a billing service to your organization.

The screenshot shows the Optum Electronic Payments and Statements interface. At the top right, it says "Welcome, Mary Smith" with a "Not you?" link and "Resources | Logout" links. A navigation bar contains several tabs: Home, View Payments, Search Remittance, Payer PRAs, Payment Data Files, Maintain Enrollment, Manage Users, My Profile, and Billing Service Information (which is highlighted). Below the navigation bar, the page title is "Search / Add Billing Service Agents". A search form is displayed with a "Search" header and a text input field labeled "Name of Billing Service:". There are "Search" and "Clear" buttons next to the input field.

## Search/Add Billing Services – Match(es) Found

- You can enter a name of a billing service and results will display in the below grid.
- Entry of a partial name or multiple matches found for entered data will display in the below grid.

The screenshot shows the same Optum Electronic Payments and Statements interface, but now displaying search results. The search input field contains "J M Bill". Below the search form, there are "Save" and "Cancel" buttons. The search results are displayed in a table with the following data:

Search Results:  
 1 Next Previous First Page Last Page Page 1 of 1

TIN ▲	Name of Billing Service	Address	City	State	Zip	Primary Administrator Name	Contact Email	Contact Phone	Associate Billing Service to TIN	Effective Date	Provider TIN
202397898	J M Billing Service	33 lake st	Minneapolis	MN	56565	Jimmy Johns	jjohns@msn.com	(952)234-4567	<input type="checkbox"/>	<input type="text"/>	123456789

## Search/Add Billing Services – No Match Found

- If no match could be found for entered billing service name, a message will display to either check your entered data or to send an email to your billing service to enroll in EPS.
- In order for your organization to allow billing services access to your payment information, they must be enrolled in EPS.

The screenshot displays the Optum user interface for "Electronic Payments and Statements". At the top left is the Optum logo. On the top right, it says "Welcome, Singh Kunal" with a "Not you?" link, and "Resources | Logout" below it. A navigation bar contains several menu items: Home, View Payments, Search Remittance, Payer PRAs, Payment Data Files, Maintain Enrollment, Manage Users, My Profile, and Billing Service Information (which is highlighted in orange). Below the navigation bar, the page title is "Search / Add Billing Service Agents". A search box is present with the label "Search" and the text "Name of Billing Service: XYZ Billing". To the right of the input field are "Search" and "Clear" buttons. Below the search box, a message states: "No matches were found, please refine your search, or if you would like to send an email to your Billing Service to enroll in EPS, please click [here](#)".

## Search/Add Billing Services – Send Email

- An email is presented for you to use to send a request to your billing service to enroll in EPS.
- If you want to send your own message, you can clear the data out and type in your own text.
- Enter your billing service's email address and hit 'Send'. Email will be immediately sent out to the billing service.

The screenshot displays the Optum user interface for "Electronic Payments and Statements". The top navigation bar includes the Optum logo, the user name "Welcome, Singh Kunal", and a "Not you?" link. Below this is a secondary navigation bar with "Resources" and "Logout". A main menu contains several options: Home, View Payments, Search Remittance, Payer PRAs, Payment Data Files, Maintain Enrollment, Manage Users, My Profile, and Billing Service Information (which is highlighted).

The main content area is titled "Search / Add Billing Service Agents". It features a search box with the text "Name of Billing Service: XYZ Billing" and buttons for "Search" and "Clear". Below the search box, a message states: "No matches were found, please refine your search, or if you would like to send an email to your Billing Service to enroll in EPS, please click [here](#)".

The "Email for Billing Service" section contains a form with the following fields:

- Billing Service Email:** An empty text input field.
- Subject:** A text input field containing the text "Enroll with EPS for quick access to claims and payment data for your co".
- Message:** A text area containing a pre-written email message: "Dear Medical Billing Service Professional, For safe and secure online access to claims and payment data, please enroll with Electronic Payments and Statements (EPS) today. To get started go to: (insert URL for billing service enrollment flow) and complete the enrollment form."

Buttons for "Send", "Clear", and "Cancel" are located at the bottom right of the form.

A note at the bottom of the page reads: "Note: Email may not be secure. If you would like to personalize the message, please do not enter PHI - Personal Health".