OPTUM Training Session

virtual visits: Provider Portal Training Guide

Provider Portal Overview

Today’s Training

- The virtual visits provider portal is where providers in the Optum network will sign in to schedule, manage, and conduct telemental health appointments.
- Today we will go over the provider onboarding process and the main features of the virtual visits Provider Portal.
- As a prerequisite to this training, please review the Provider Portal Training Guide to become familiar with the content we will cover.

Agenda

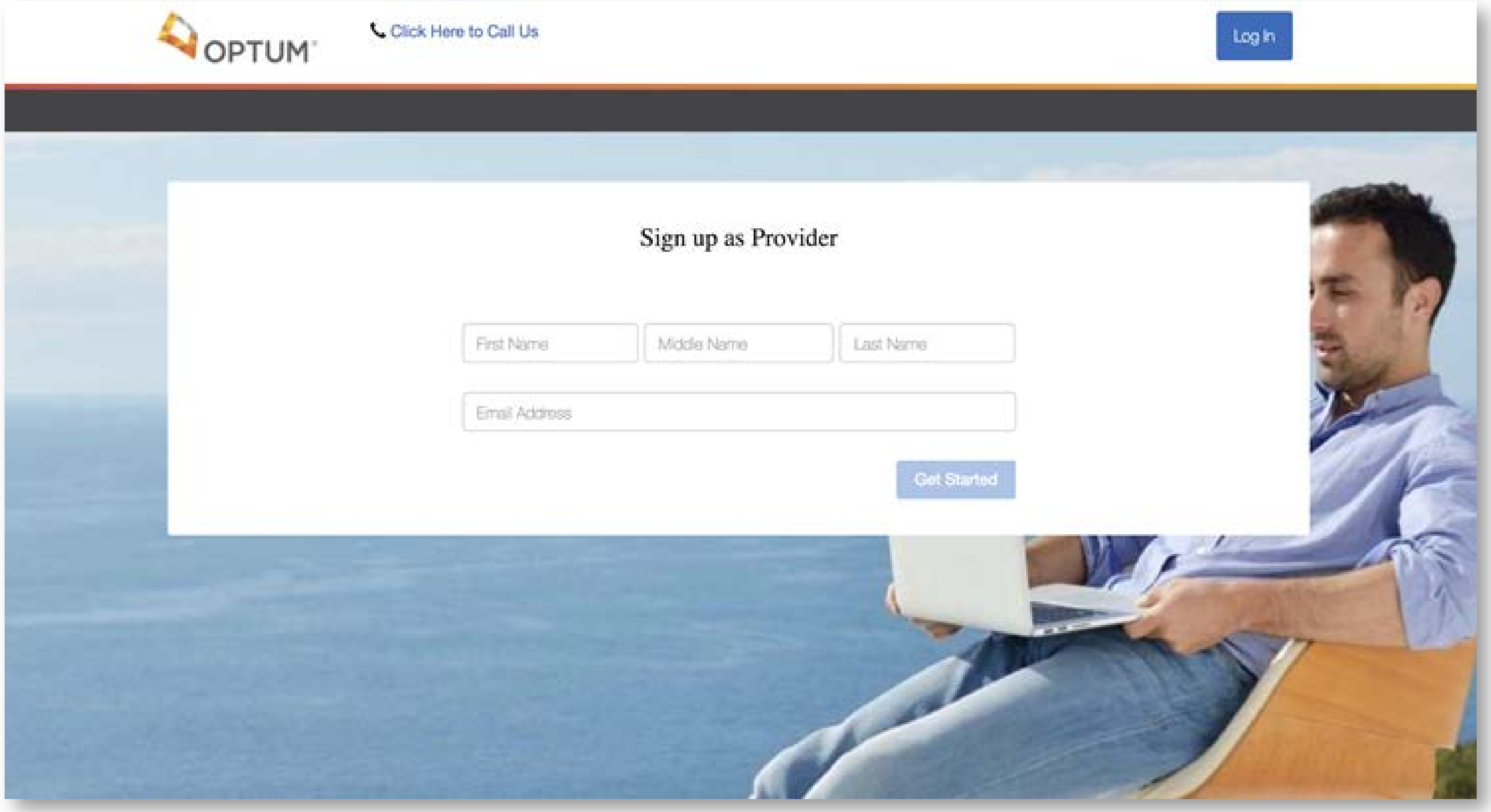
- Onboarding
- Dashboard
- New Appointment
- Patient Files
- Reports
- Patients
- Payments
- Settings

Onboarding

In this section, providers can:

- Sign up for virtual visits and begin the onboarding process

Sign Up

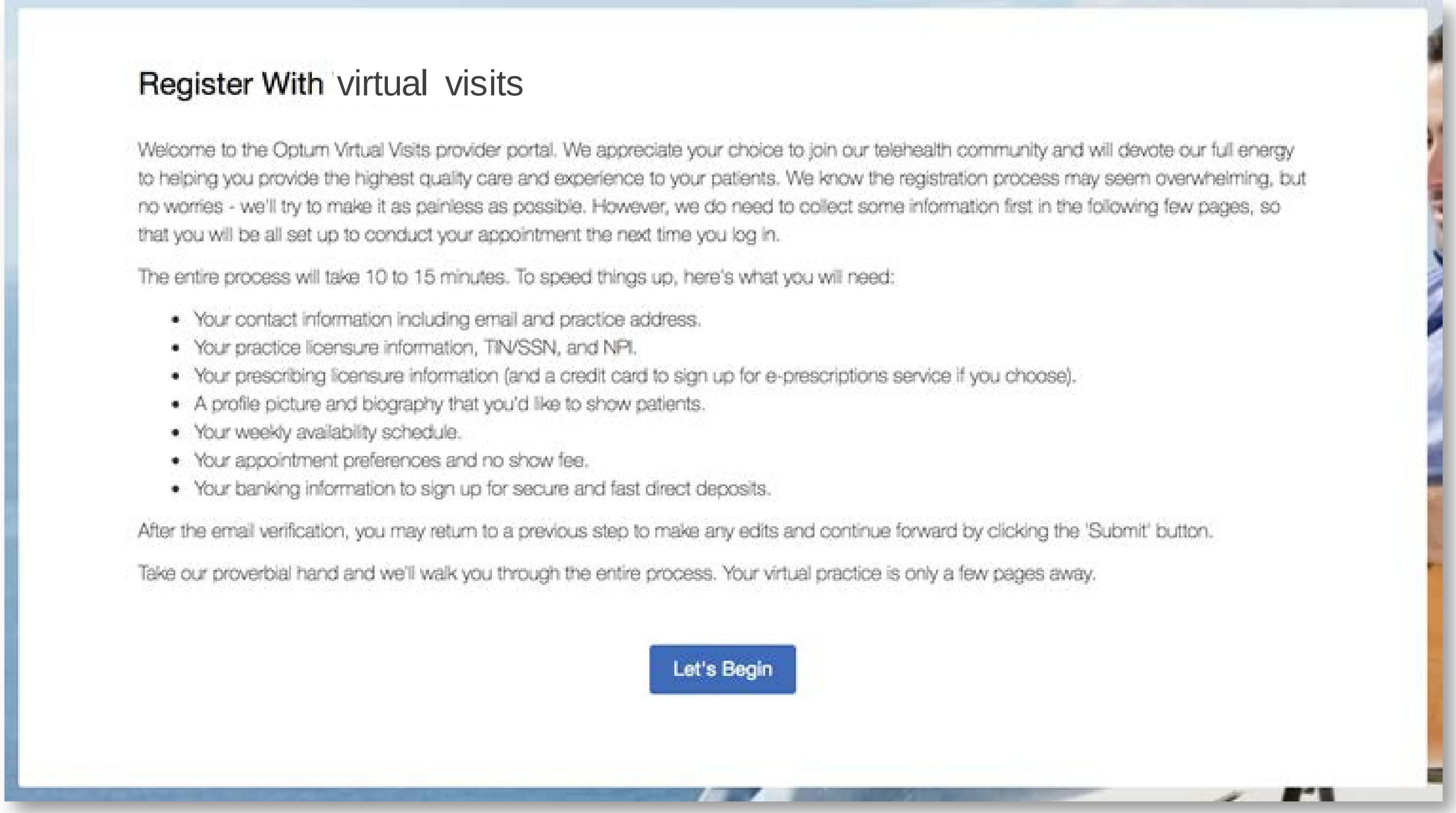


Onboarding

In this section, providers can:

- Read through an overview of the registration process
- Prepare their information (e.g., TIN, license #s) for a faster process

Registration Overview



Onboarding

Confidentiality

In this section, providers can:

- Review the confidentiality agreement prior to registration

Confidentiality

Introduction

We recognize that the privacy of your personal information is important. The purpose of this policy is to let you know how we handle the information collected through the use of this website. Portions of this website may describe privacy practices applicable to specific types of information or to information provided on specific web pages.

This policy does not apply to information collected through other means such as by telephone or in person, although that information may be protected by other privacy policies. As used in this policy, terms such as "we" or "our" and "Company" refer to Optum and its current and future affiliated entities, including our parent company UnitedHealth Group.

This website is intended for a United States audience. Any information you provide, including any personal information, will be transferred to and processed by a computer server located within the United States.

Cookies And Tracking

The Company uses various technologies, which may include "cookie" technology, to gather information from our website visitors such as pages visited and how often they are visited, and to enable certain features on this website. "Cookies" are small text files that may be placed on your computer when you visit a website or click on a URL. Cookies may include "single-session cookies" which generally record information during only a single visit to a website and then are erased, and "persistent" cookies, which are generally stored on a computer unless or until they are deleted or are set to expire.

You may disable cookies and similar items by adjusting your browser preferences at any time; however, this may limit your ability to take advantage of all the features on this website. You may also manage the use of "flash" technologies, with the Flash management tools available at Adobe's website. Note

Social Security Number Protection Policy

Protecting personal information is important to Optum. It is our policy to protect the confidentiality of Social Security numbers ("SSNs") that we receive or collect in the course of business. We secure the confidentiality of SSNs through various means, including physical, technical, and administrative safeguards that are designed to protect against unauthorized access. It is our policy to limit access to SSNs to that which is lawful, and to prohibit unlawful disclosure of SSNs.

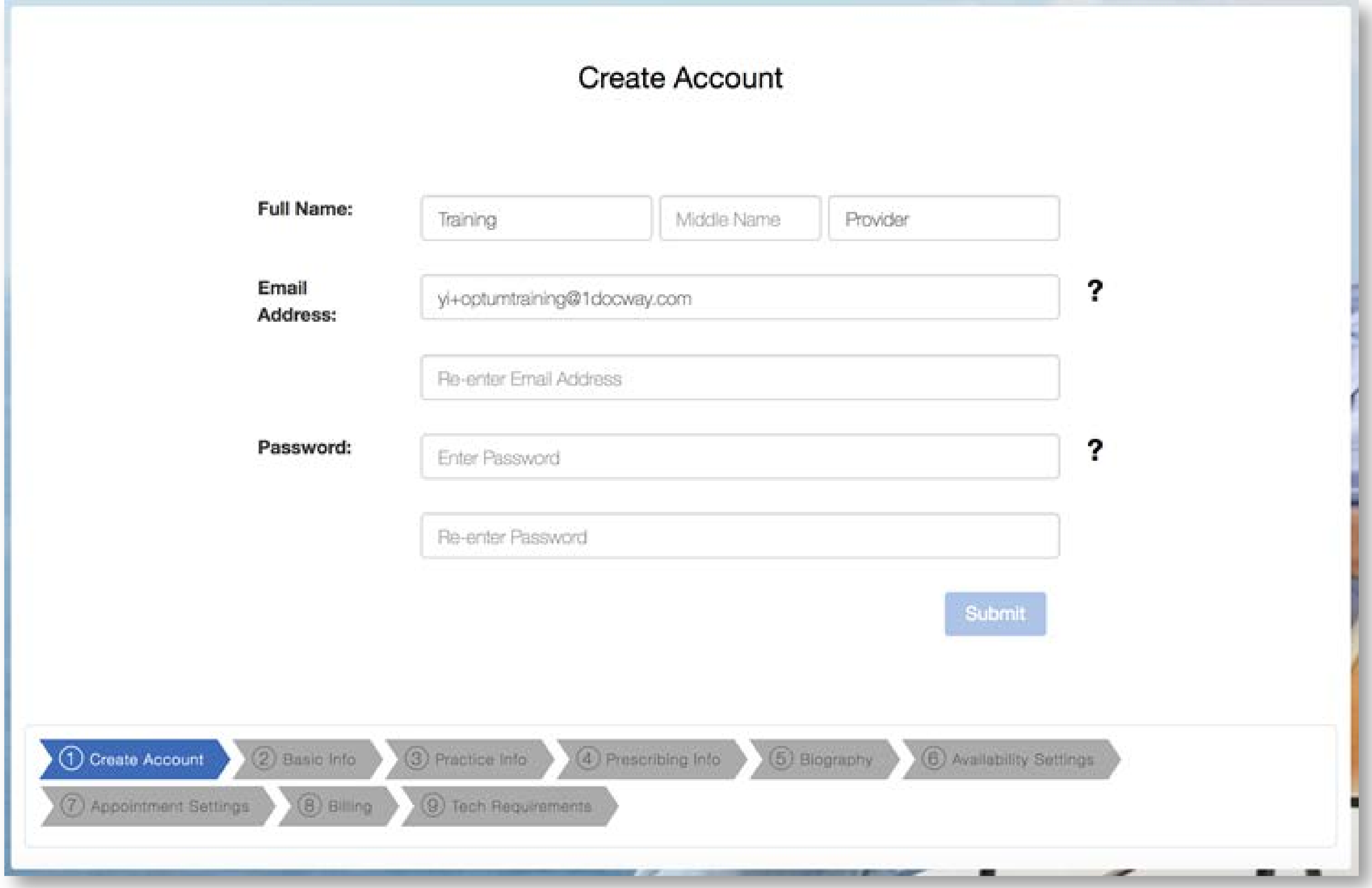
Accept and Continue

Onboarding

In this section, providers can:

- Create an account by entering their full name and email address and creating a password

Create Account

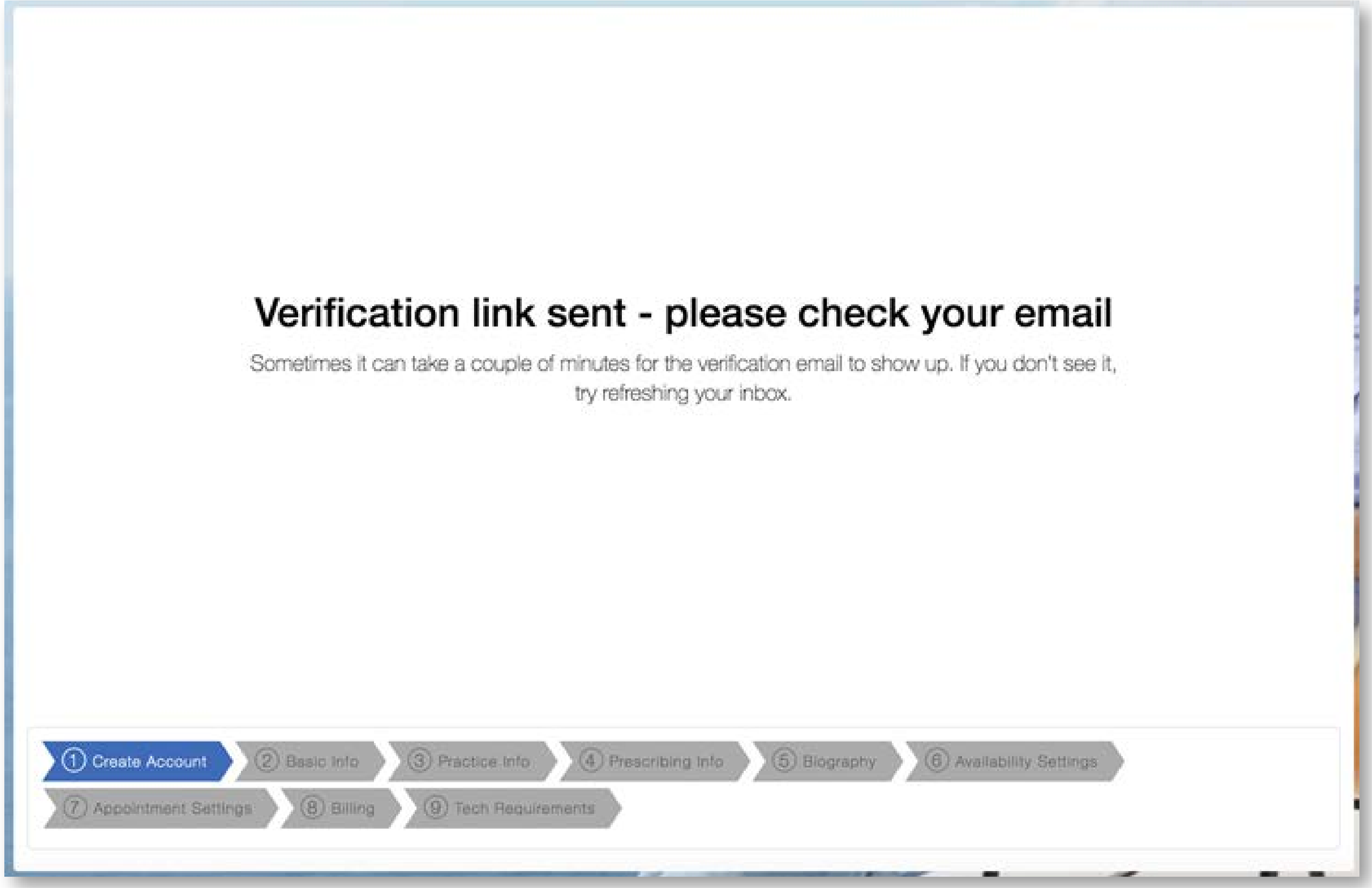


Onboarding

In this section, providers can:

- Verify their email address

Verify Email

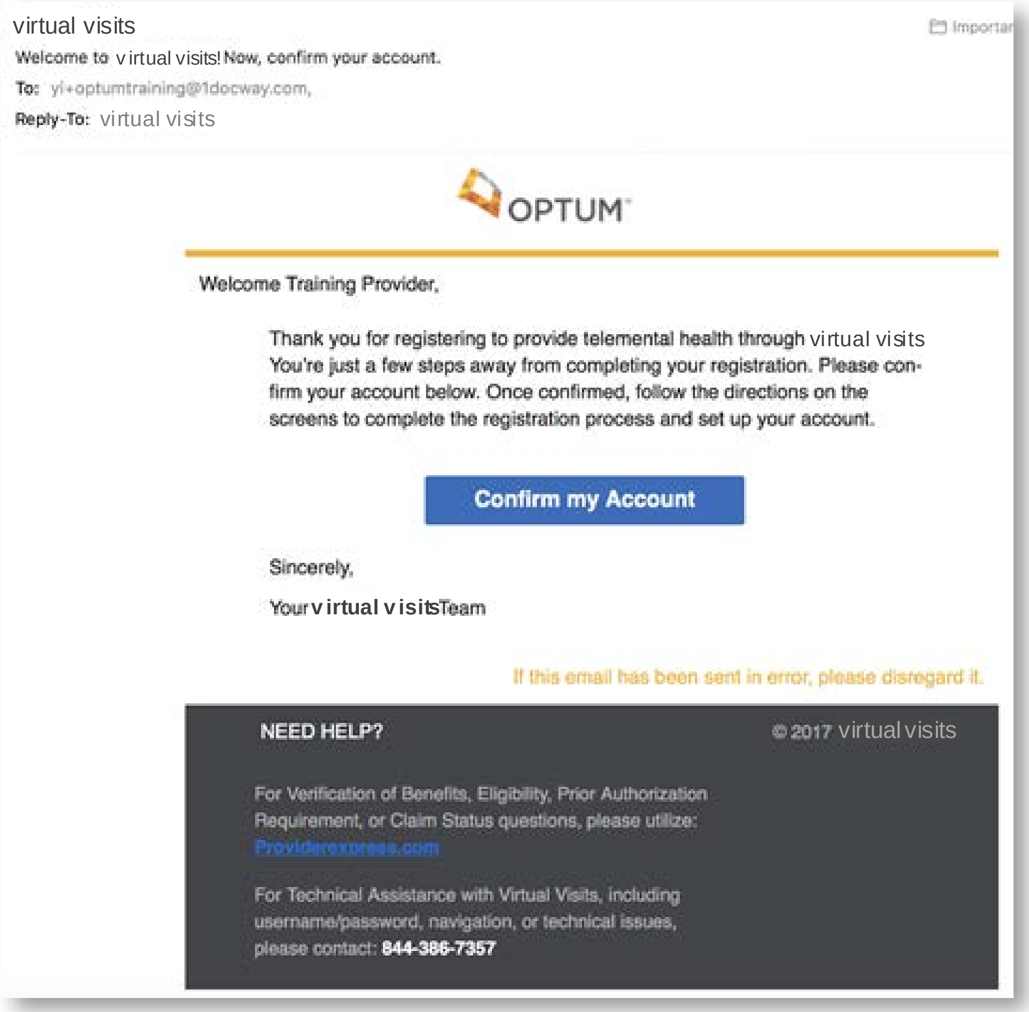


Onboarding

In this section, providers can:

- Verify their email address

Verify Email



virtual visits

Welcome to virtual visits! Now, confirm your account.

To: yi+optumtraining@1docway.com,

Reply-To: virtual visits

OPTUM

Welcome Training Provider,

Thank you for registering to provide telemental health through virtual visits You're just a few steps away from completing your registration. Please confirm your account below. Once confirmed, follow the directions on the screens to complete the registration process and set up your account.

Confirm my Account

Sincerely,

Your virtual visits Team

If this email has been sent in error, please disregard it.

NEED HELP?

© 2017 virtual visits

For Verification of Benefits, Eligibility, Prior Authorization Requirement, or Claim Status questions, please utilize: Providerexpress.com

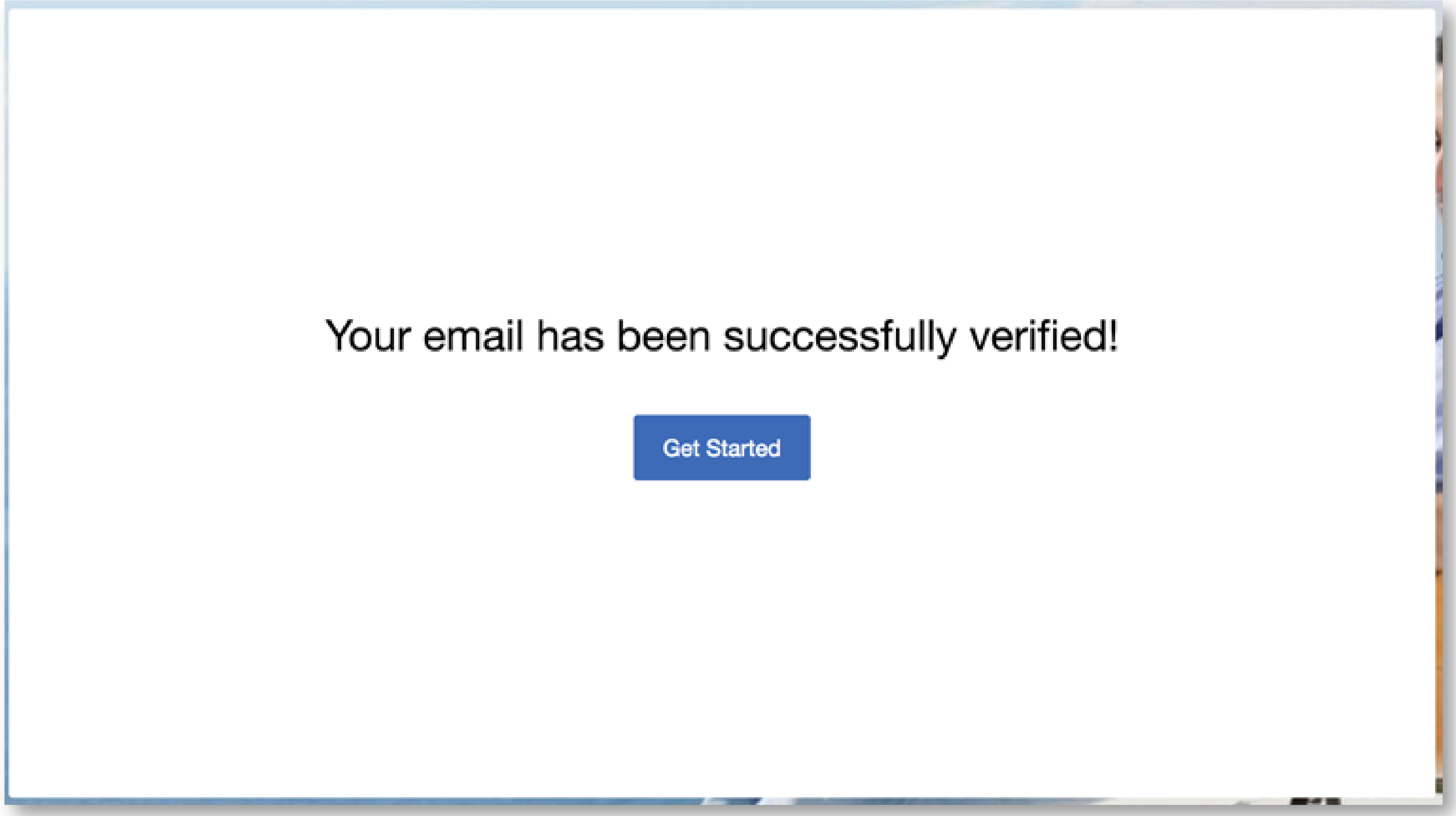
For Technical Assistance with Virtual Visits, including username/password, navigation, or technical issues, please contact: **844-386-7357**

Onboarding

In this section, providers can:

- Verify their email address

Verify Email

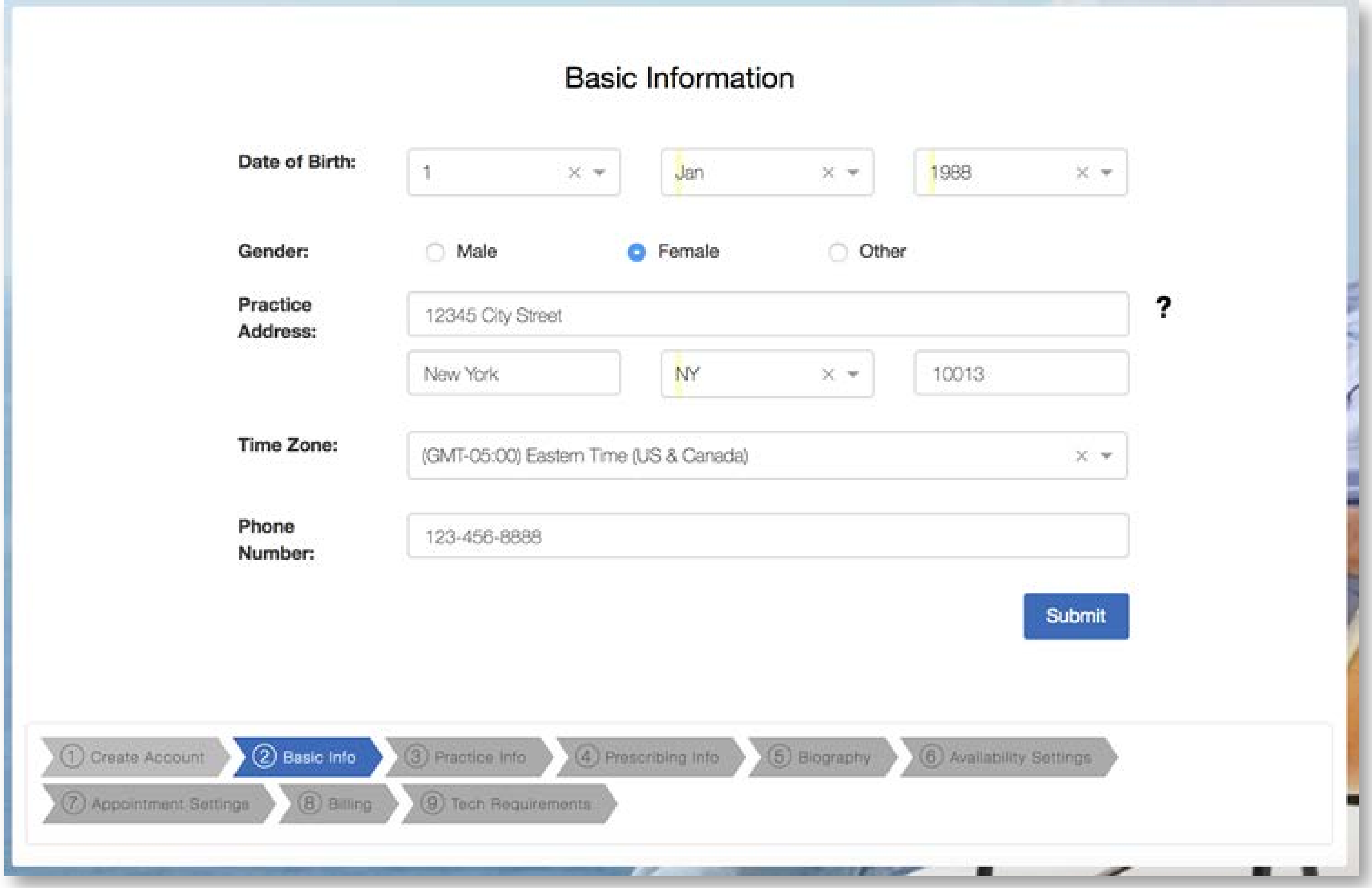


Onboarding

In this section, providers can:

- Enter demographic information for their account including their birthday, gender, address, and phone number

Basic Information

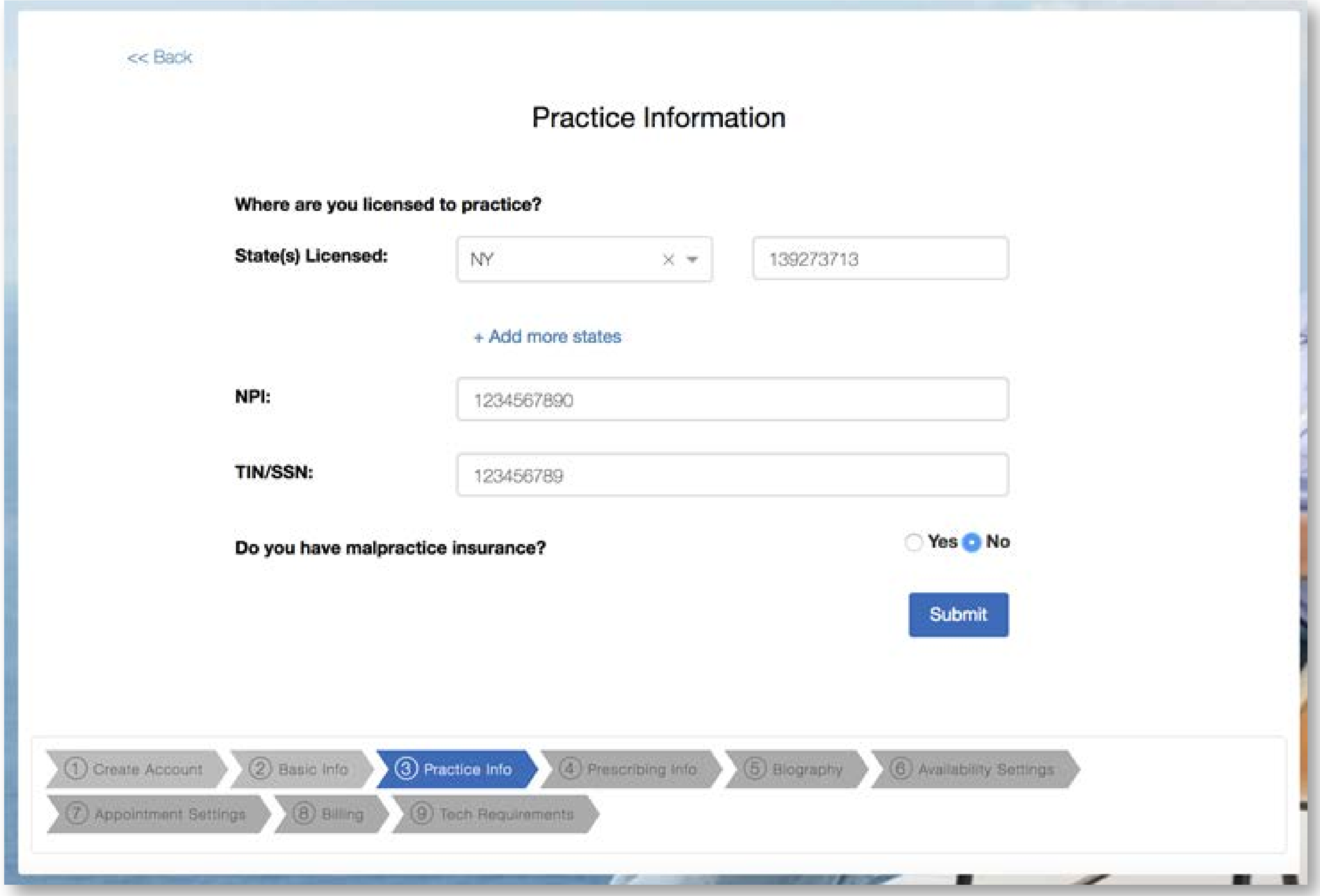


Onboarding

In this section, providers can:

- Enter their Practice information including license information by state, their NPI number, and malpractice insurance information

Practice Information

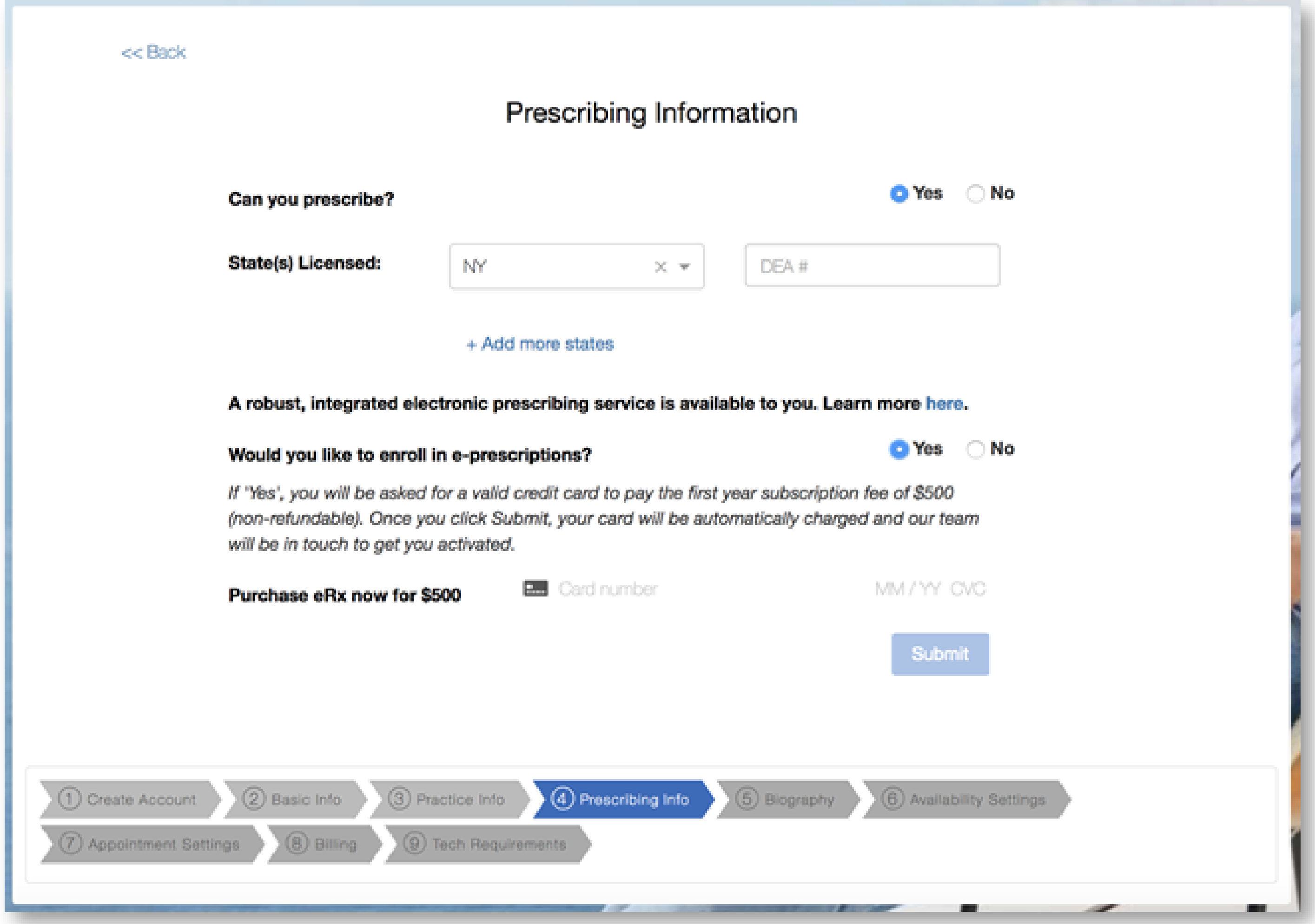


Onboarding

In this section, providers can:

- Enter prescribing license information
- Enroll in the optional e-prescriptions service and enter payment information to set up recurring payments
- Skip this step for now and subscribe at a later time in the Settings section

Prescribing Information

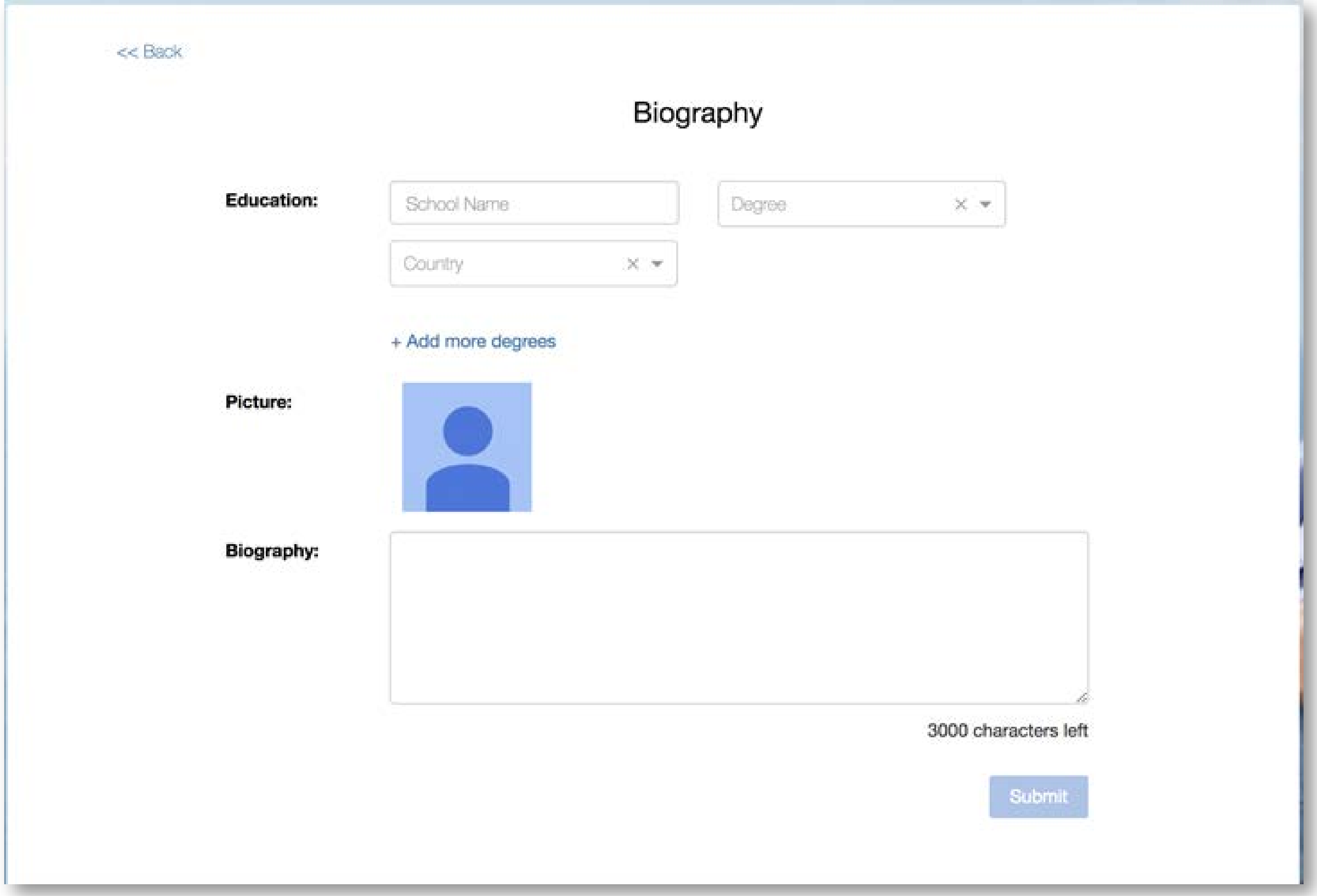


Onboarding

Provider Biography

In this section, providers can:

- Create a biography with their educational background and any additional credentials or information they would like to include. This biography will be visible to members
- Upload a profile picture

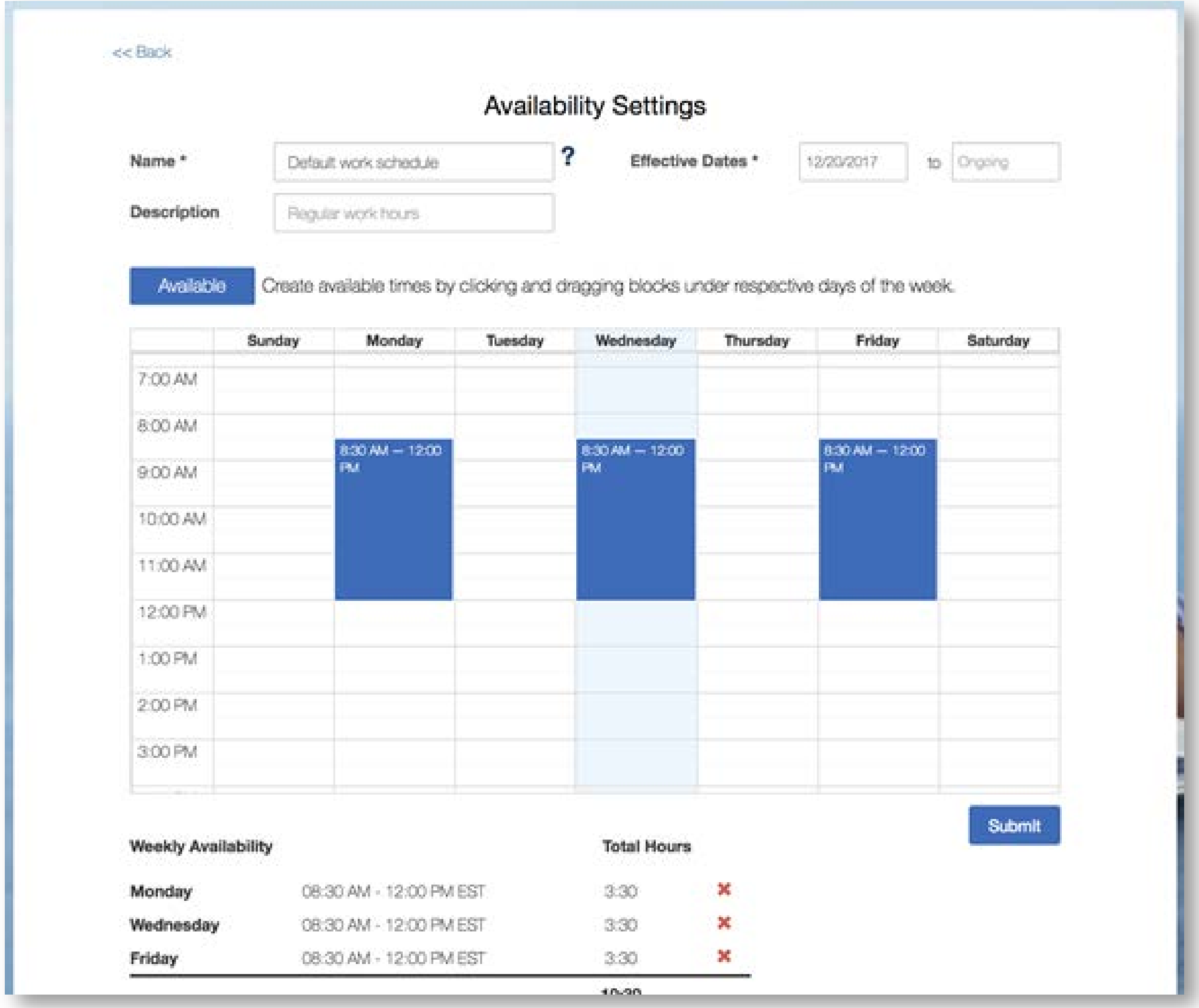


Onboarding

Provider Availability

In this section, providers can:

- Create a weekly availability schedule using the calendar tool. This schedule will be used as the provider's default availability when booking future appointments



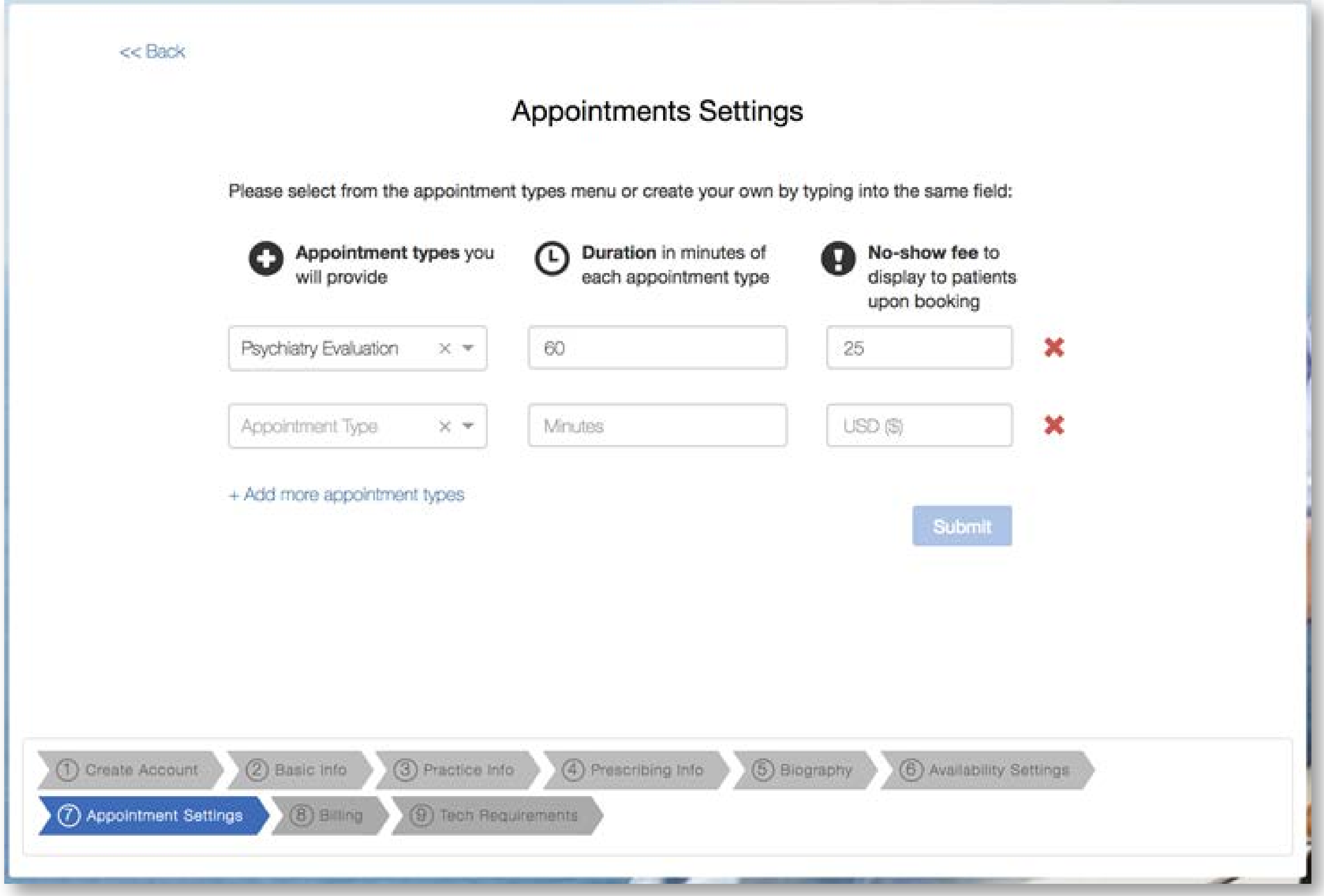
Onboarding

In this section, providers can:

- Create the types of appointments they offer patients along with their duration in minutes
- Determine any no show fees they would like to be displayed to patients

Note: Providers are responsible for billing and enforcing these fees.

Appointment Settings

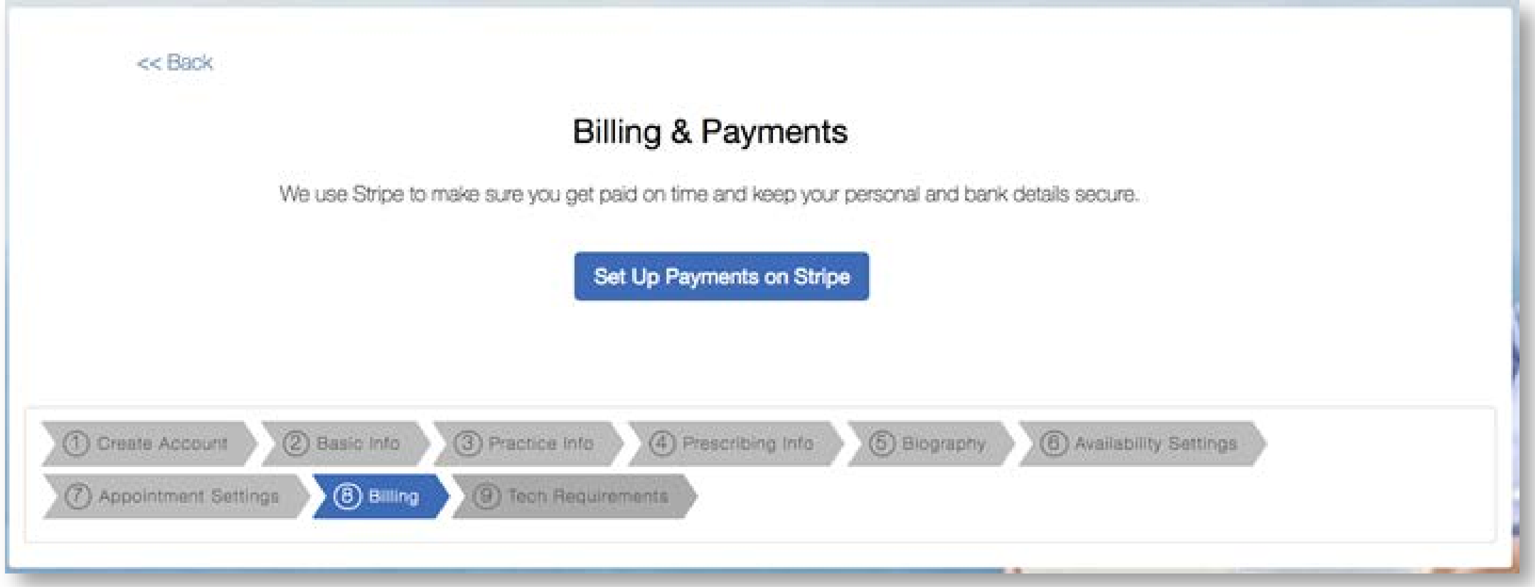


Onboarding

In this section, providers can:

- Set up direct deposit information for monthly payments via Stripe
- Store their credit card information on Stripe for regular service charges e.g., e-prescribing subscription and transaction fees

Billing & Payments

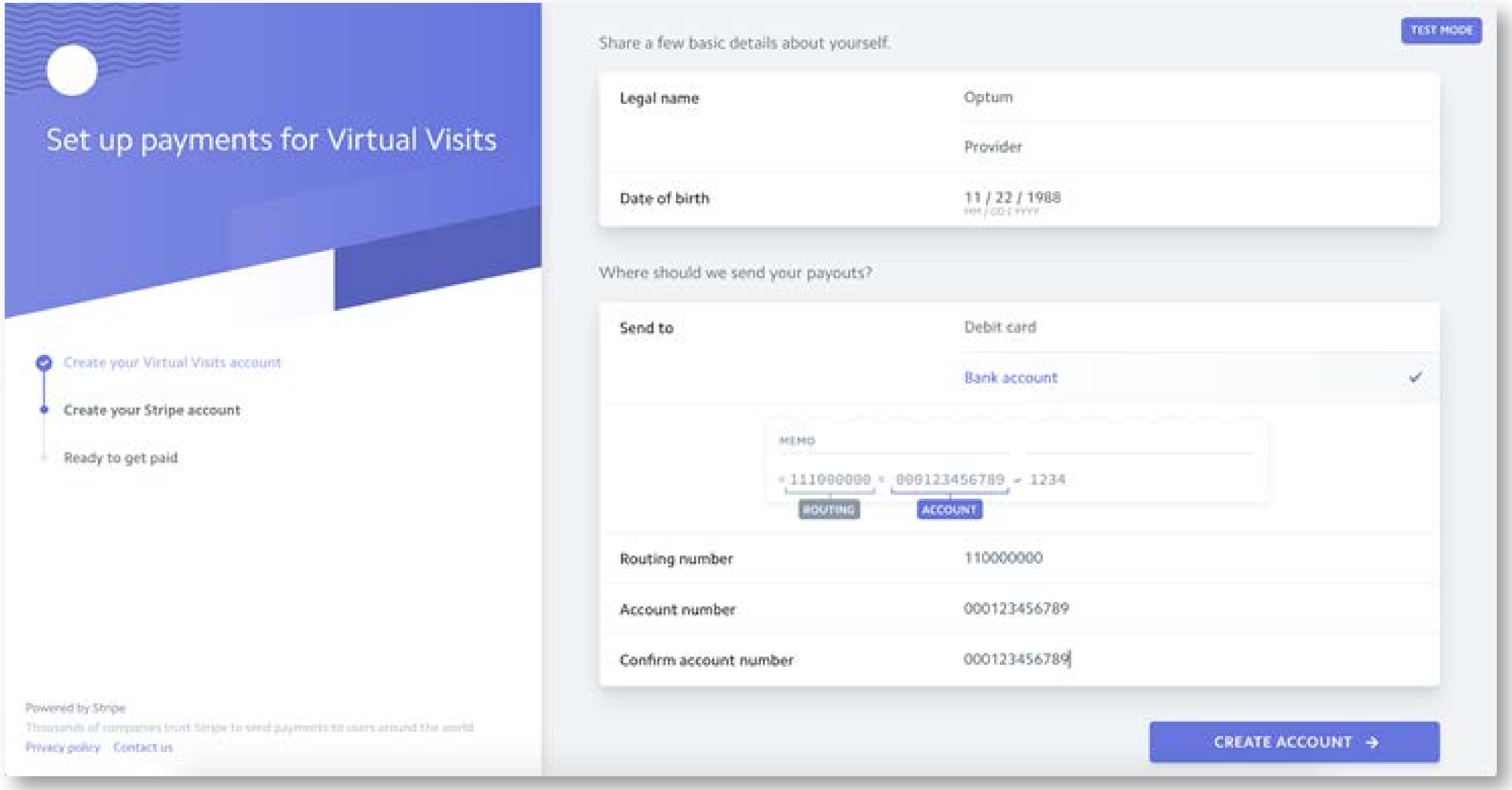


Onboarding

In this section, providers can:

- Set up direct deposit information for monthly payments via Stripe
- Store their credit card information on Stripe for regular service charges e.g., e-prescribing subscription and transaction fees

Billing & Payments

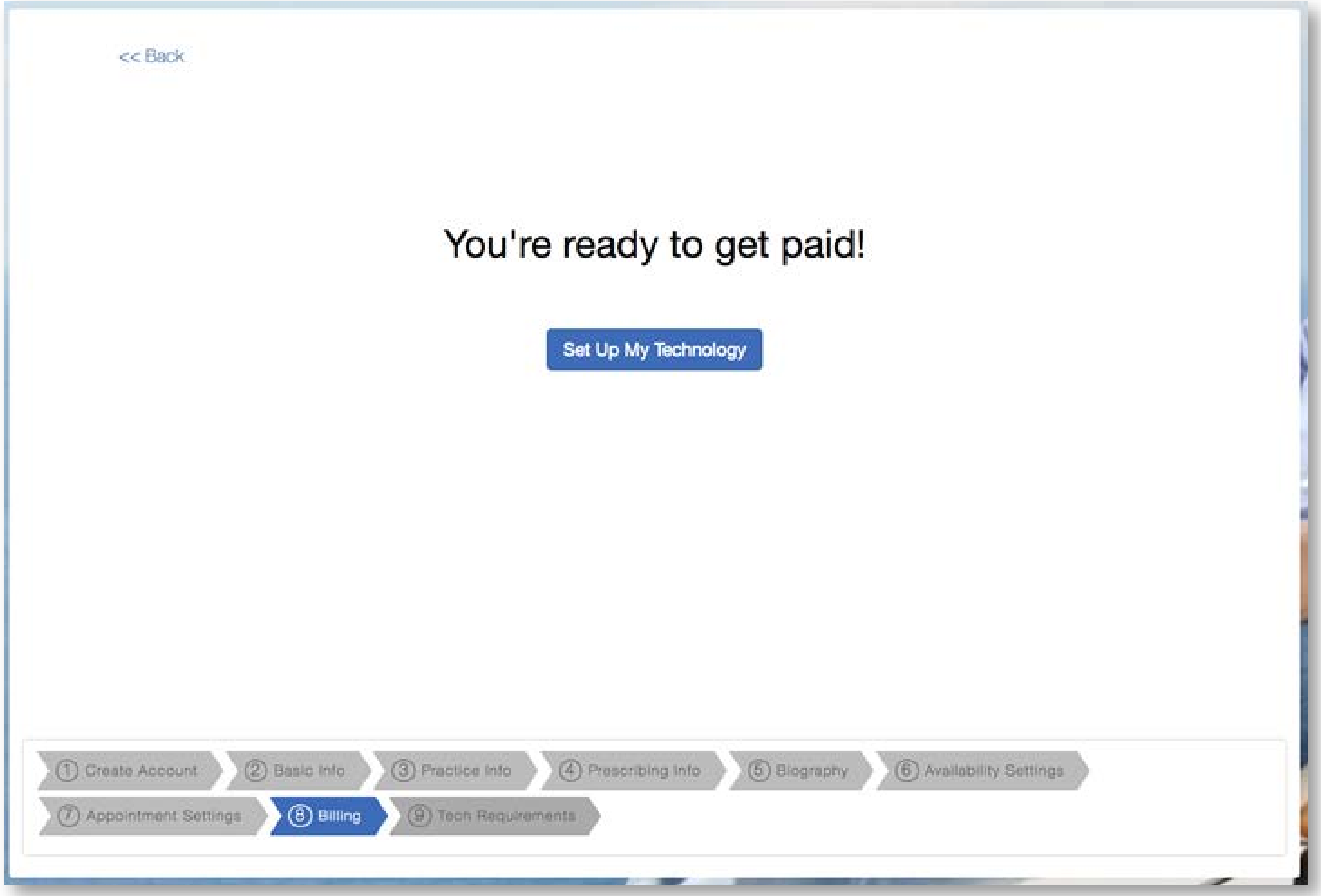


Onboarding

In this section, providers can:

- Once their Stripe account has been set up, they will be redirected to this page to complete the registration process
- They will now go through a simple tech verification process to make sure they're ready for virtual visits

Billing & Payments

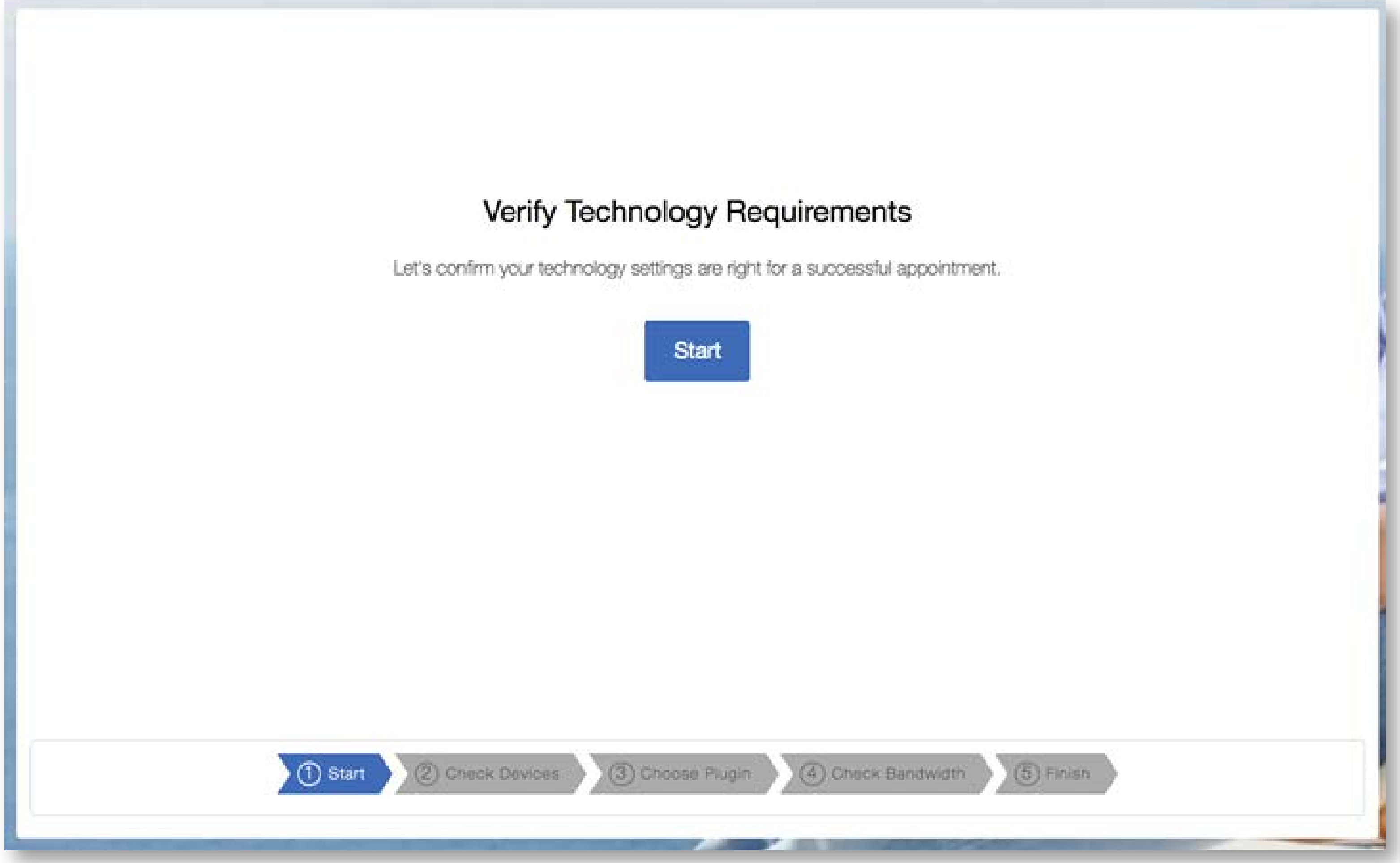


Onboarding

In this section, providers can:

- Verify their technology setup meets the requirements to conduct virtual visits

Tech Verification

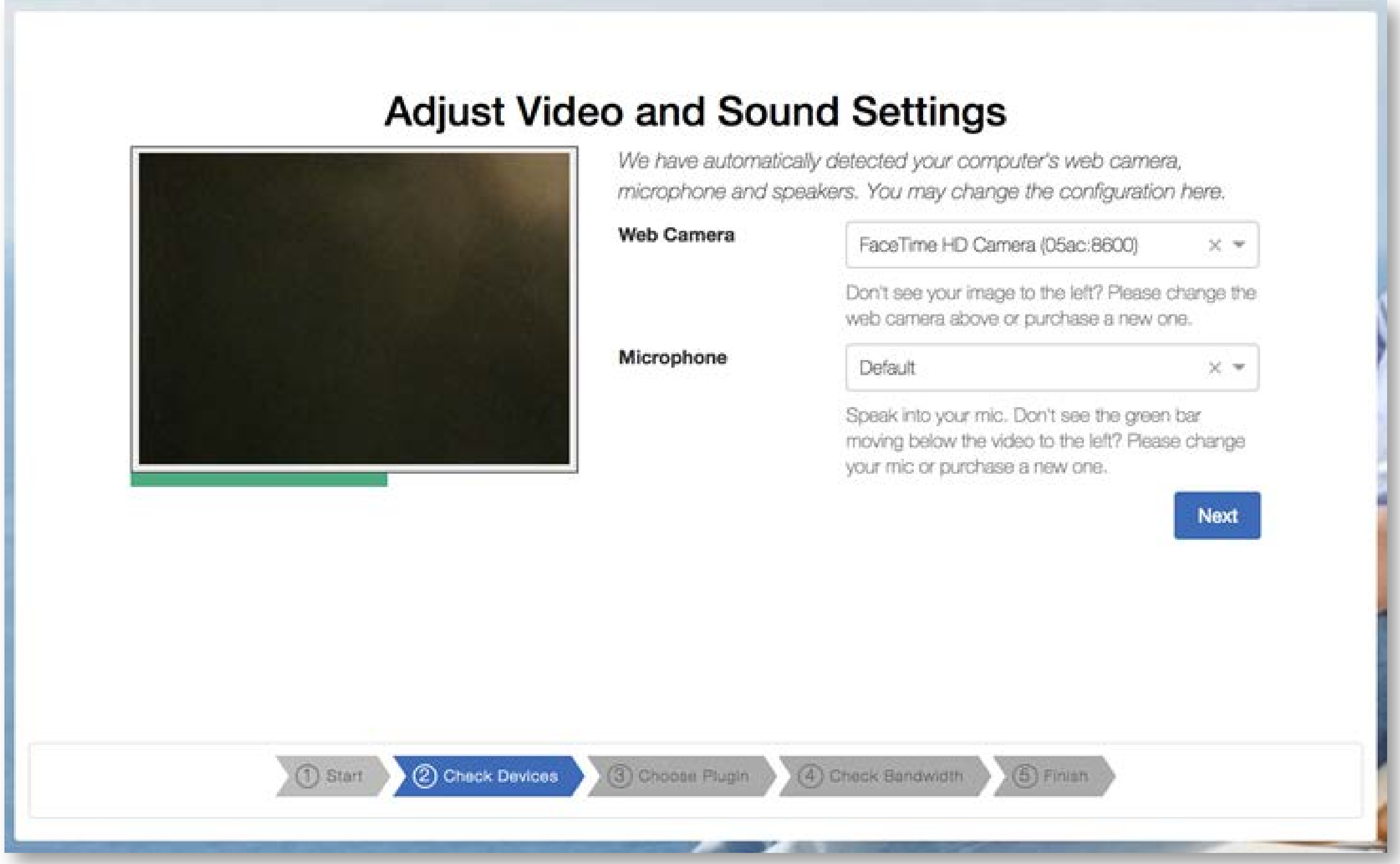


Onboarding

In this section, providers can:

- Verify their technology setup meets the requirements to conduct virtual visits

Tech Verification

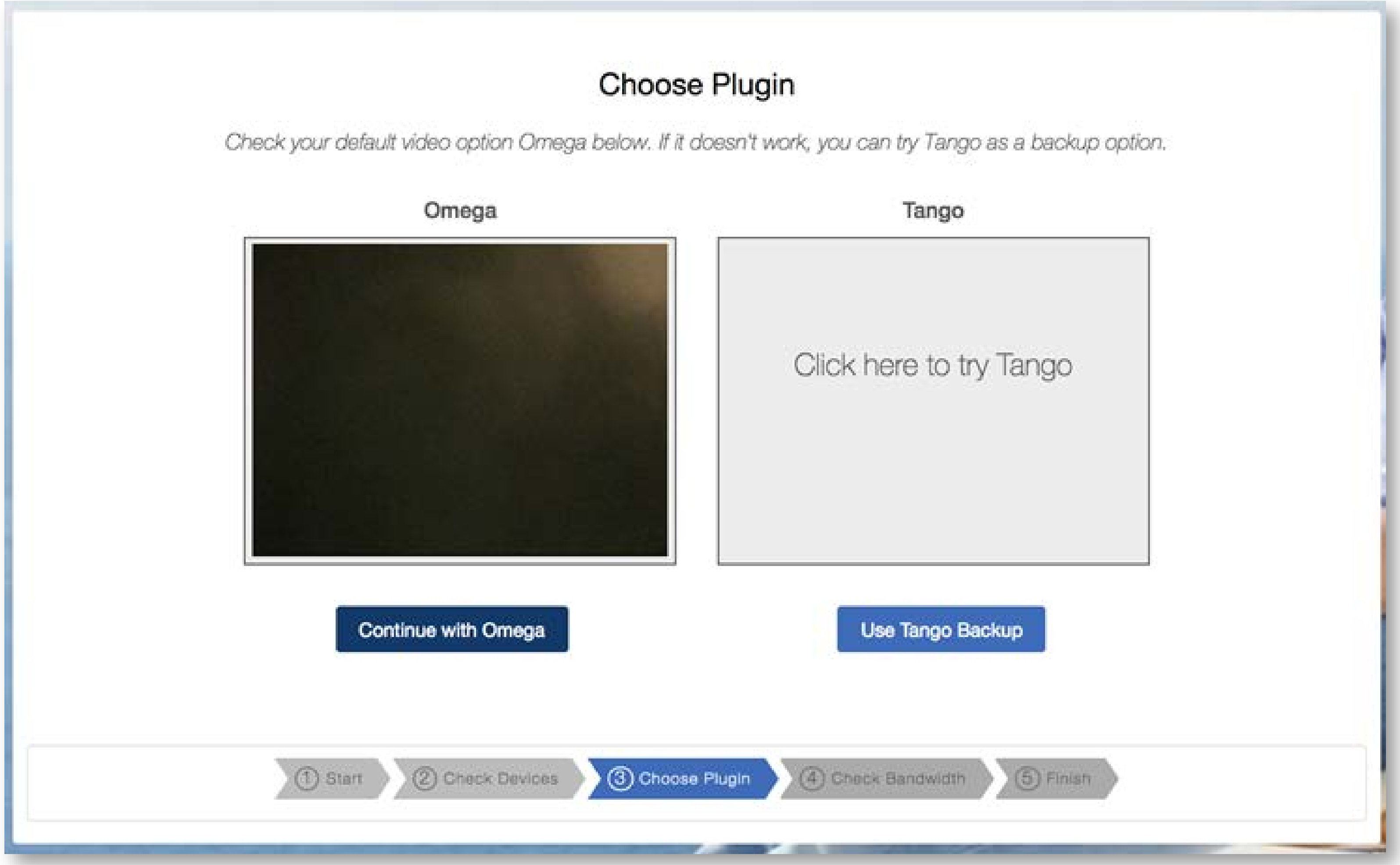


Onboarding

In this section, providers can:

- Verify their technology setup meets the requirements to conduct virtual visits

Tech Verification

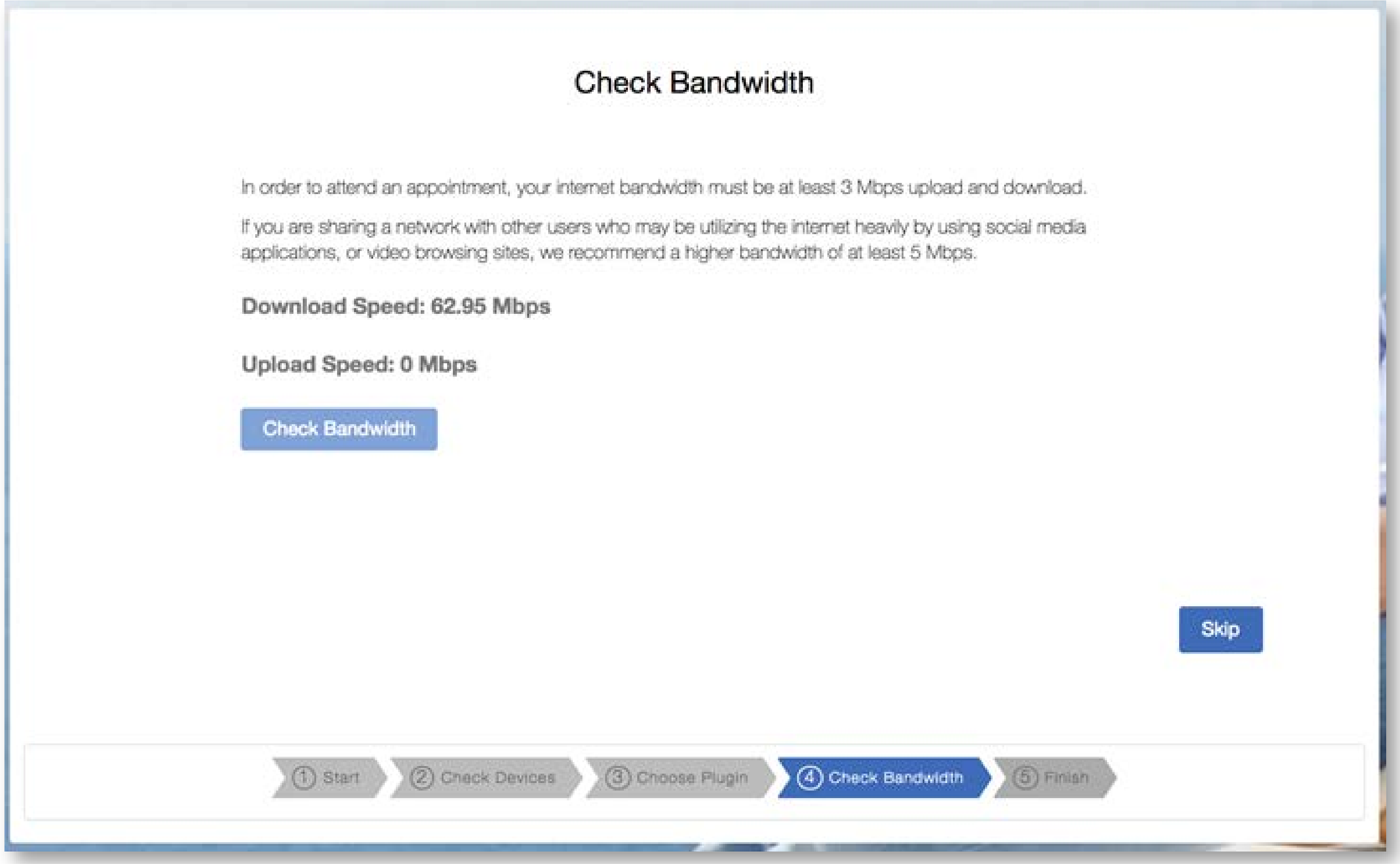


Onboarding

In this section, providers can:

- Verify their technology setup meets the requirements to conduct virtual visits

Tech Verification

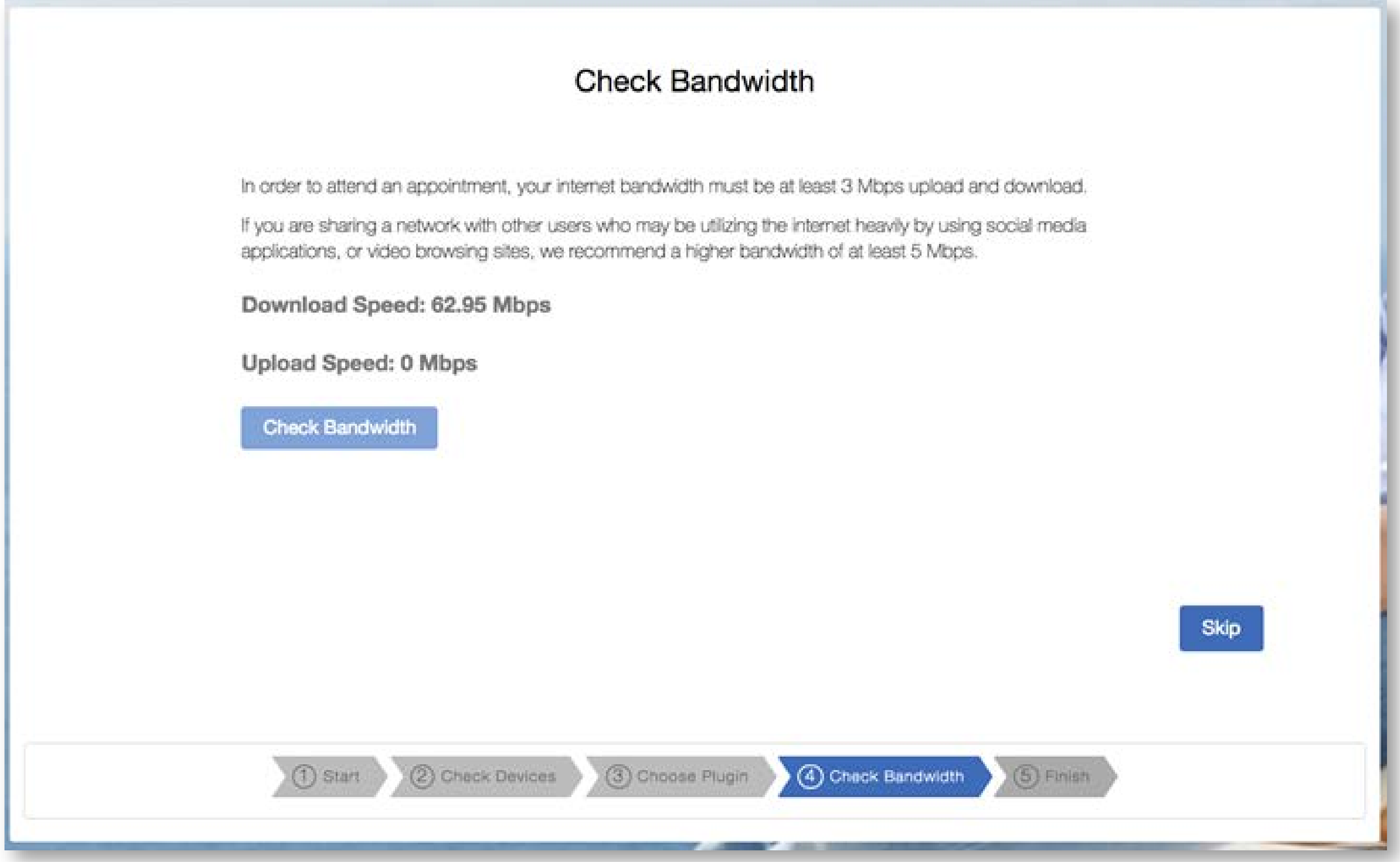


Onboarding

In this section, providers can:

- Verify their technology setup meets the requirements to conduct virtual visits

Tech Verification

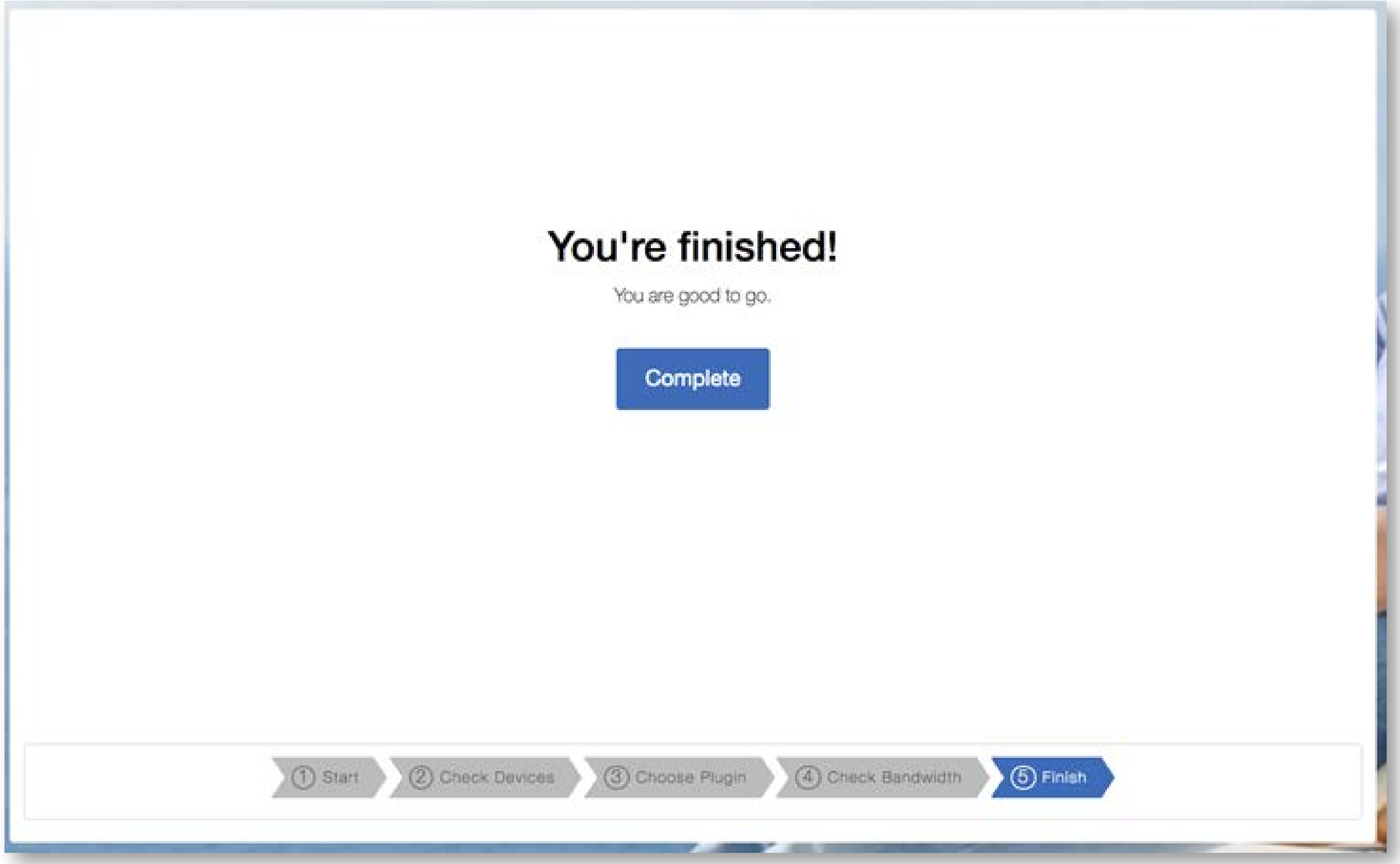


Onboarding

In this section, providers can:

- Verify their technology setup meets the requirements to conduct virtual visits

Tech Verification



Agenda

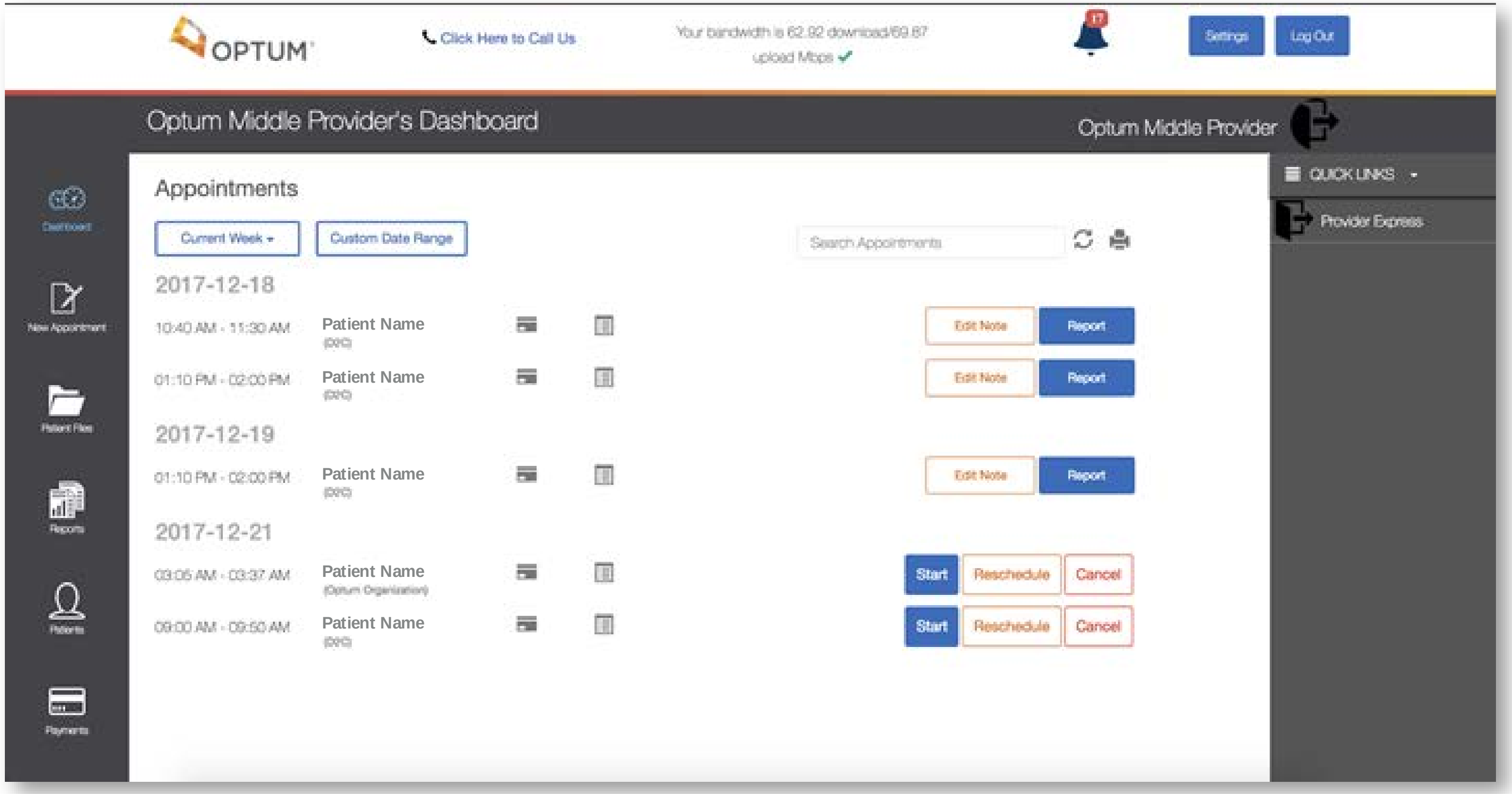
- Onboarding
- Dashboard
- New Appointment
- Patient Files
- Reports
- Patients
- Payments
- Settings

Dashboard

In this section, providers can:

- View and search through all previous and upcoming appointments
- Start, Reschedule, or Cancel an appointment
- View appointment reports
- View payment status of an appointment
- View note status of an appointment

Appointments

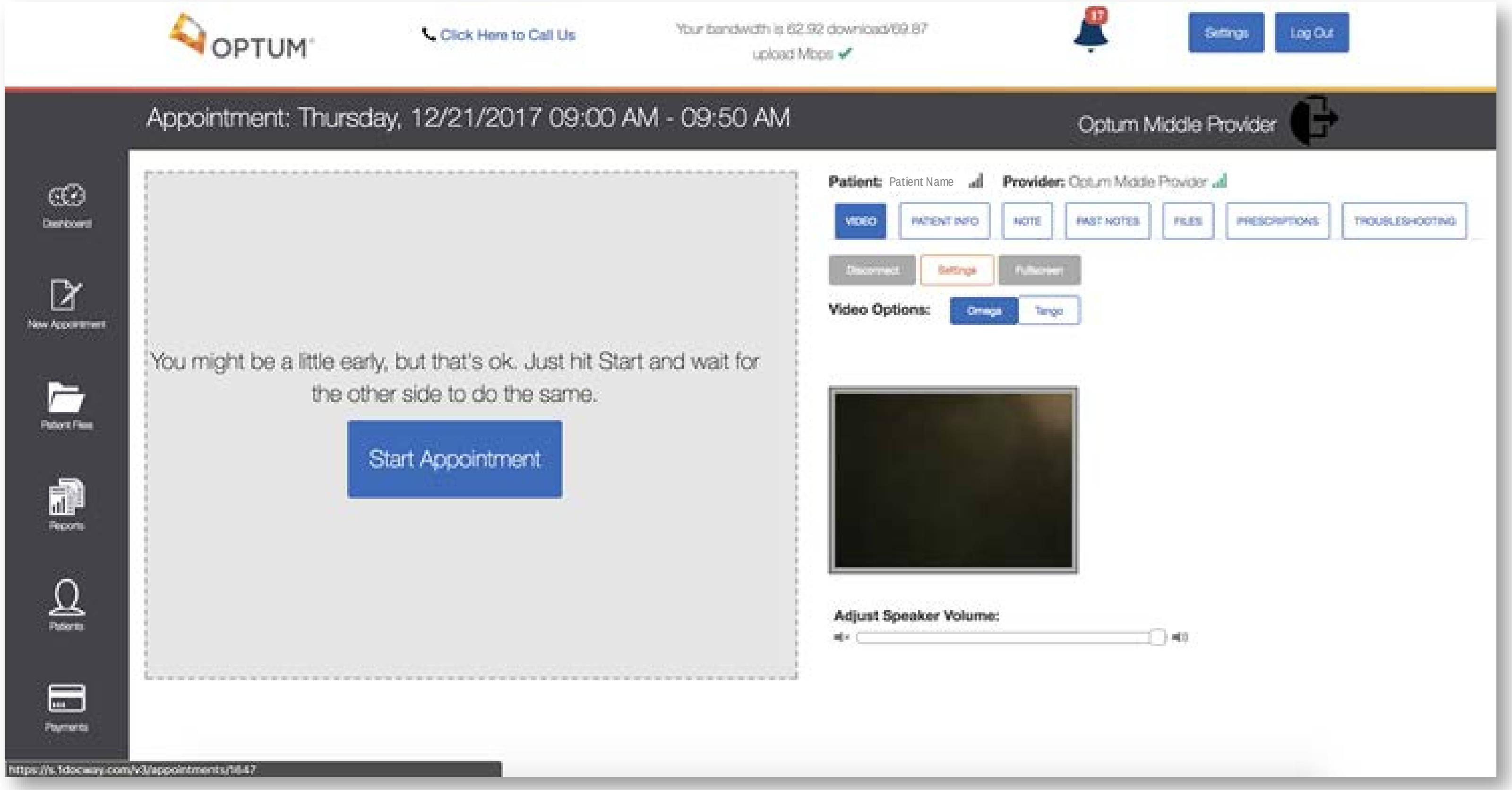


Dashboard

In this section, providers can:

- Start video chat appointments with their patients
- View patient information, past notes, files, and prescriptions
- Add new notes, new files, and create new prescriptions (if eligible)
- Check and verify audio and video access

Appointment Chat Room

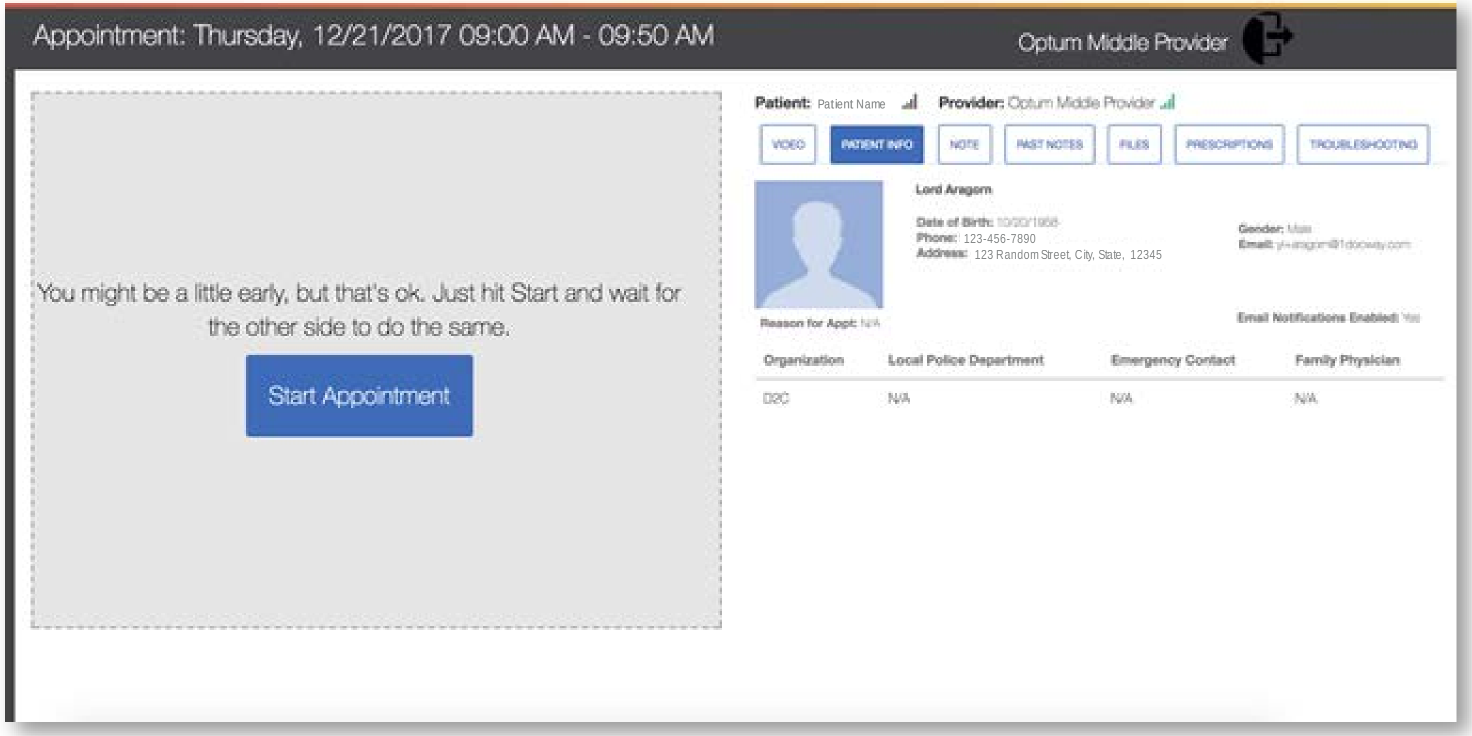


Dashboard

In this section providers can:

- View patient information including DOB, address, Gender, Email, etc.
- View the reason for appointment if provided

Patient Info

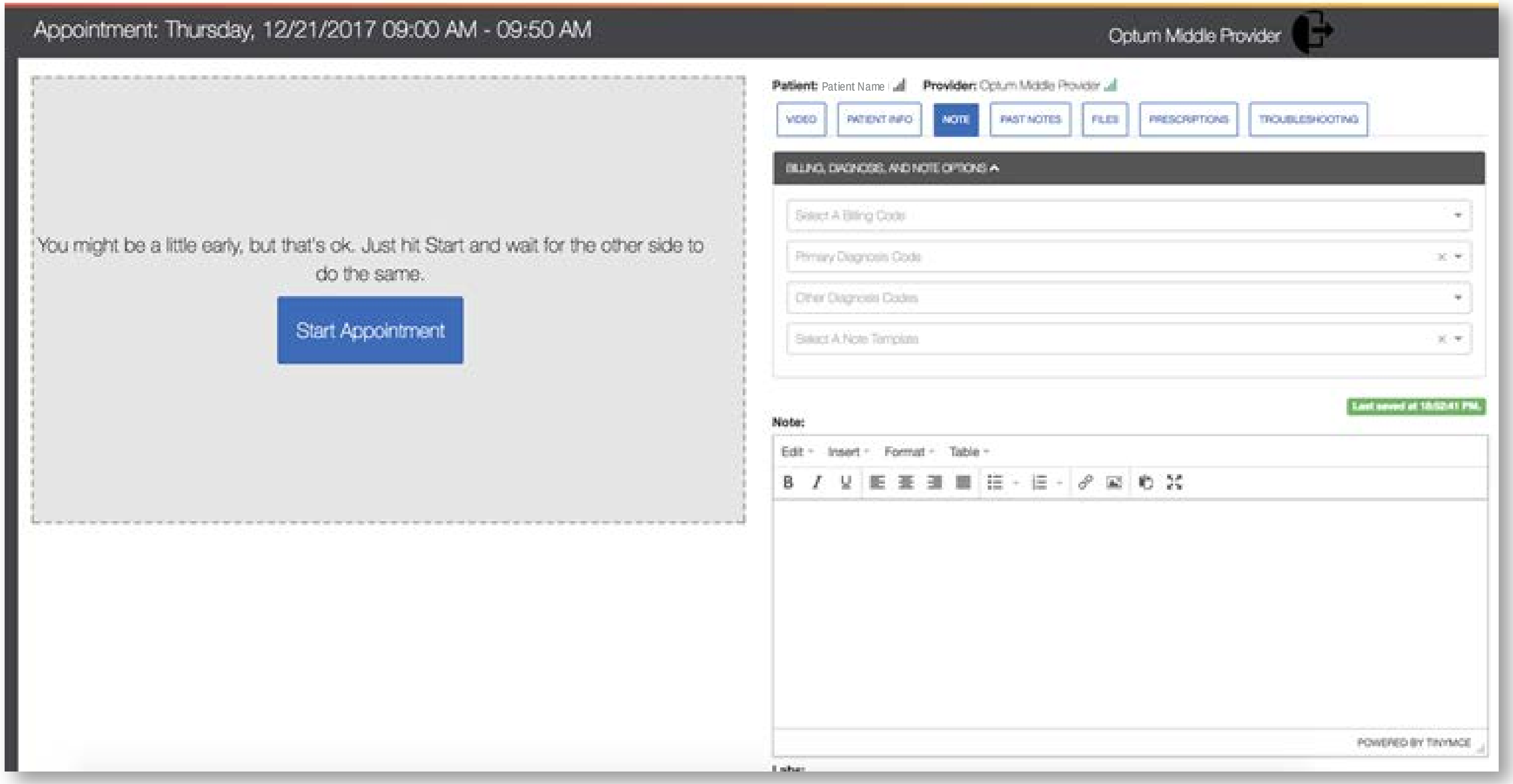


Dashboard

In this section, providers can:

- Select a Note Template from the list available and document notes while they are seeing a patient
- To properly save a note, a provider must enter in a billing code and a diagnosis code

Notes

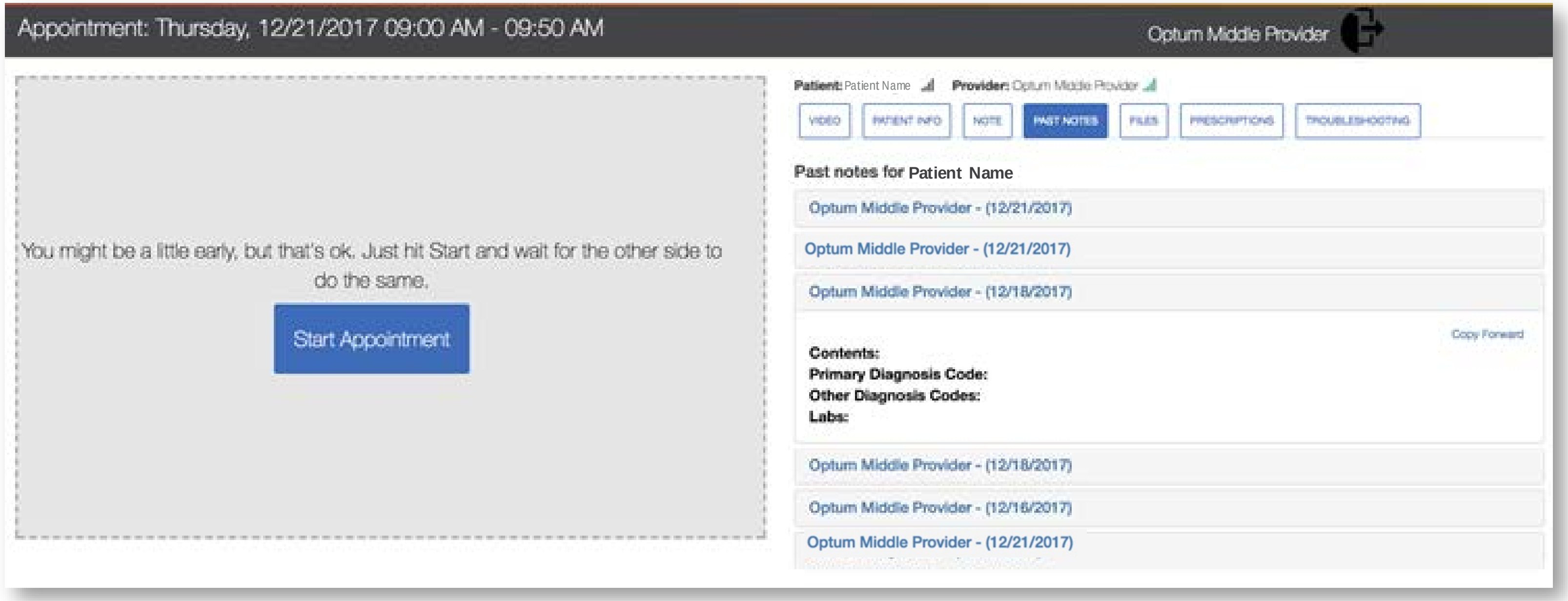


Dashboard

In this section, providers can:

- View the past notes that they have written for a patient sorted by date

Past Notes

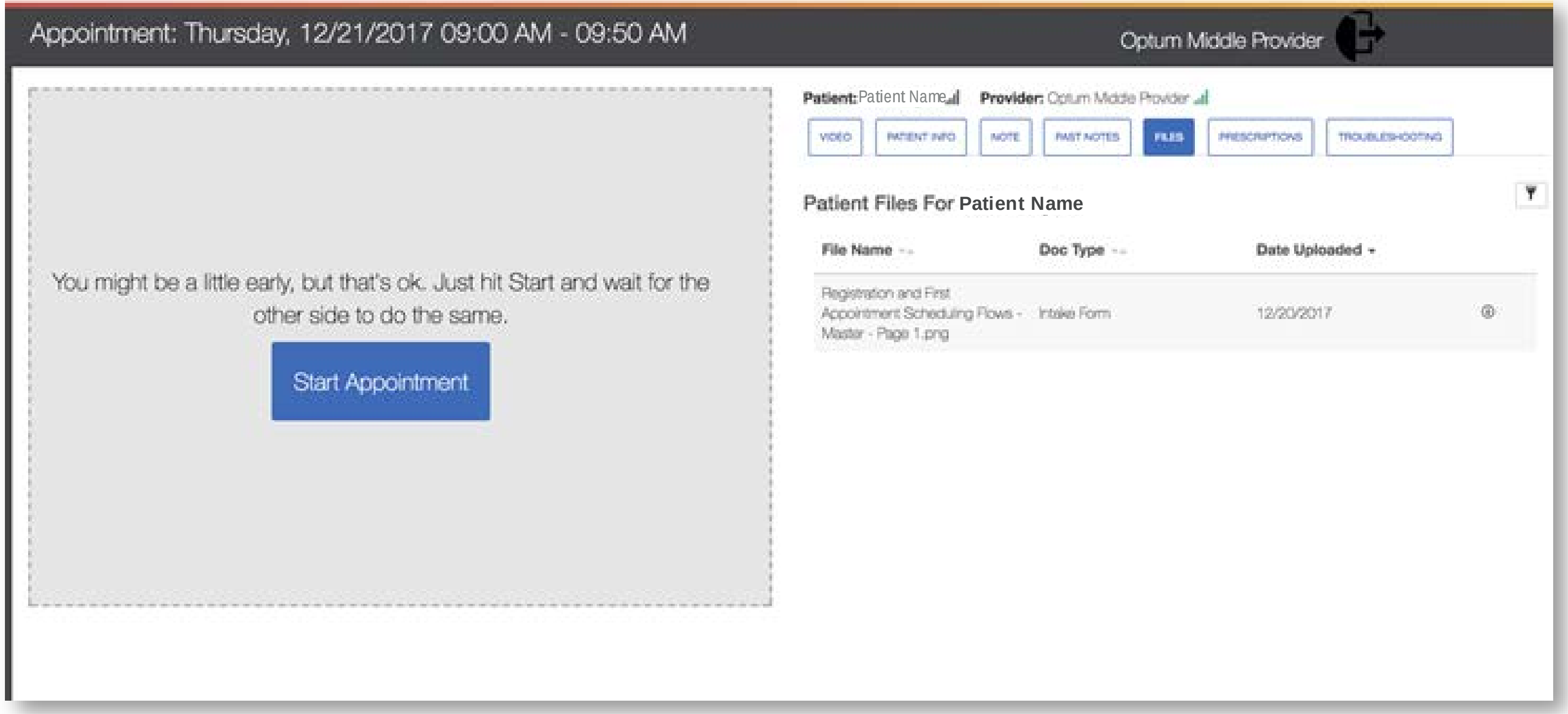


Dashboard

In this section, providers can:

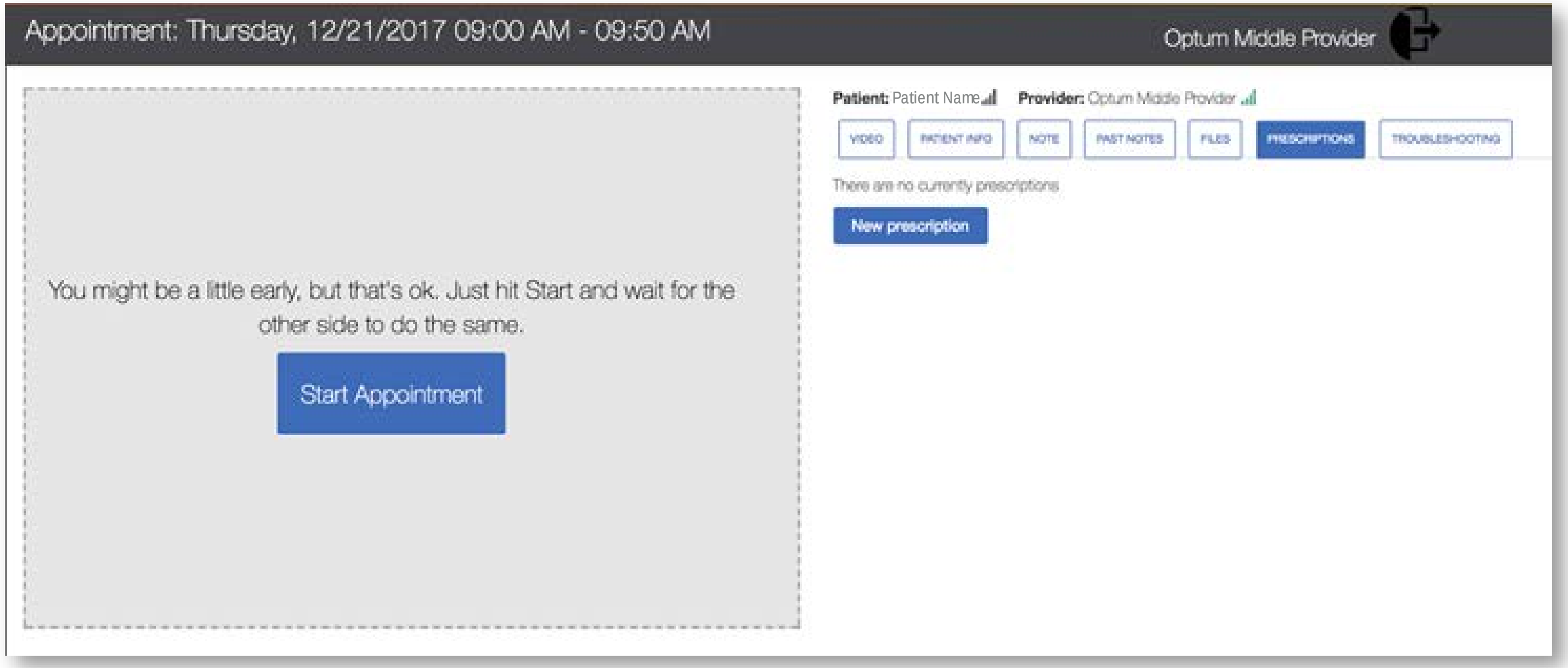
- View files for this patient. Examples of relevant files include notes on the patient written by previous providers, lab reports, etc.
- Download any of these files

Files



Dashboard

Prescriptions



In this section, providers can:

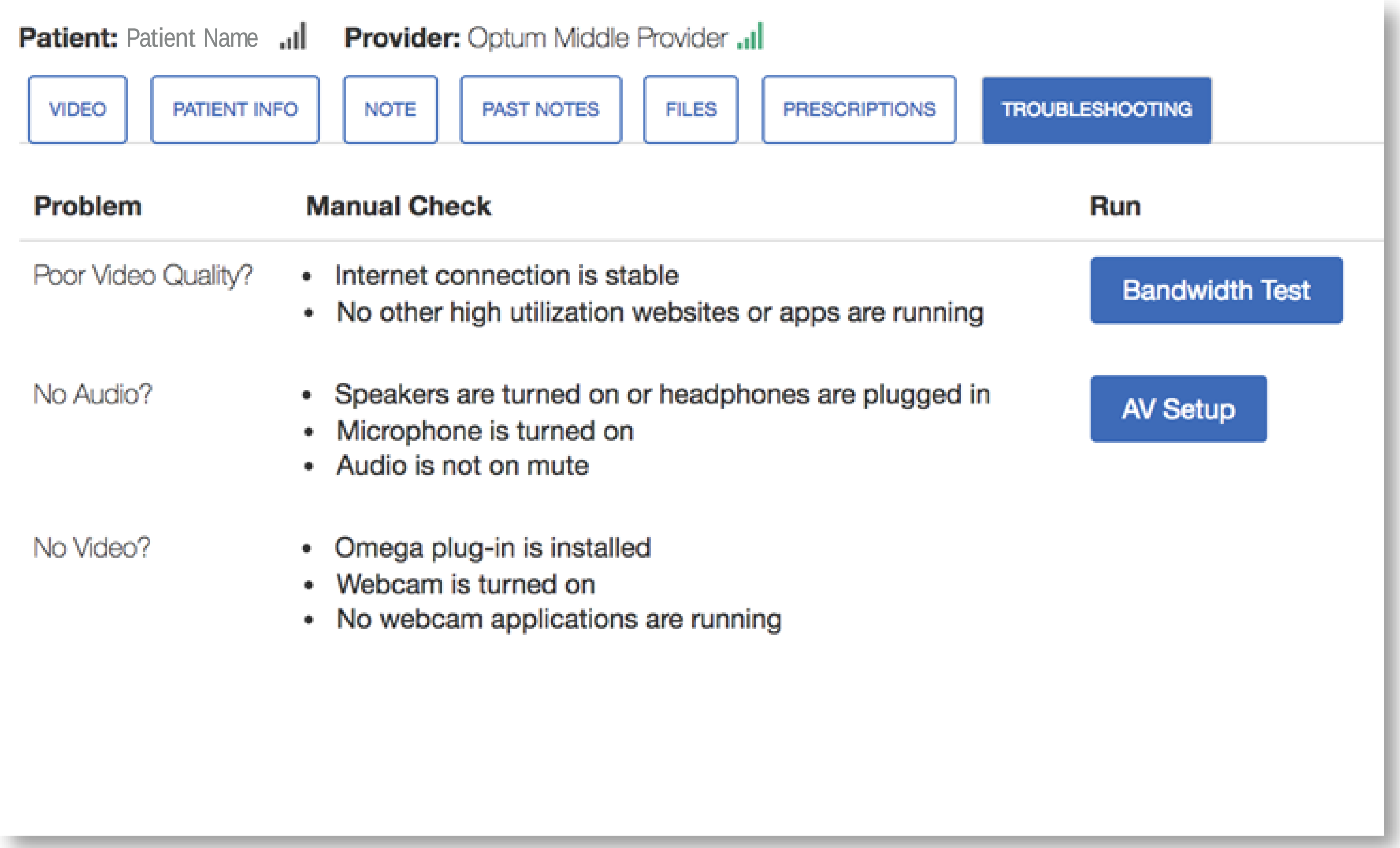
- View existing prescriptions
- Create new prescriptions
- Launch the eRx tool to prescribe medication online
- In order to use the eRx tool, providers must be enrolled in the Rcopia e-prescription service

Dashboard

In this section, providers can:

- View troubleshooting guide to help ensure they have the correct setup.
- Run a bandwidth test
- Ensure speeds of at least 3 Mbps upload and 3 Mbps download
- Check Microphone, Webcam and Audio settings

Troubleshooting



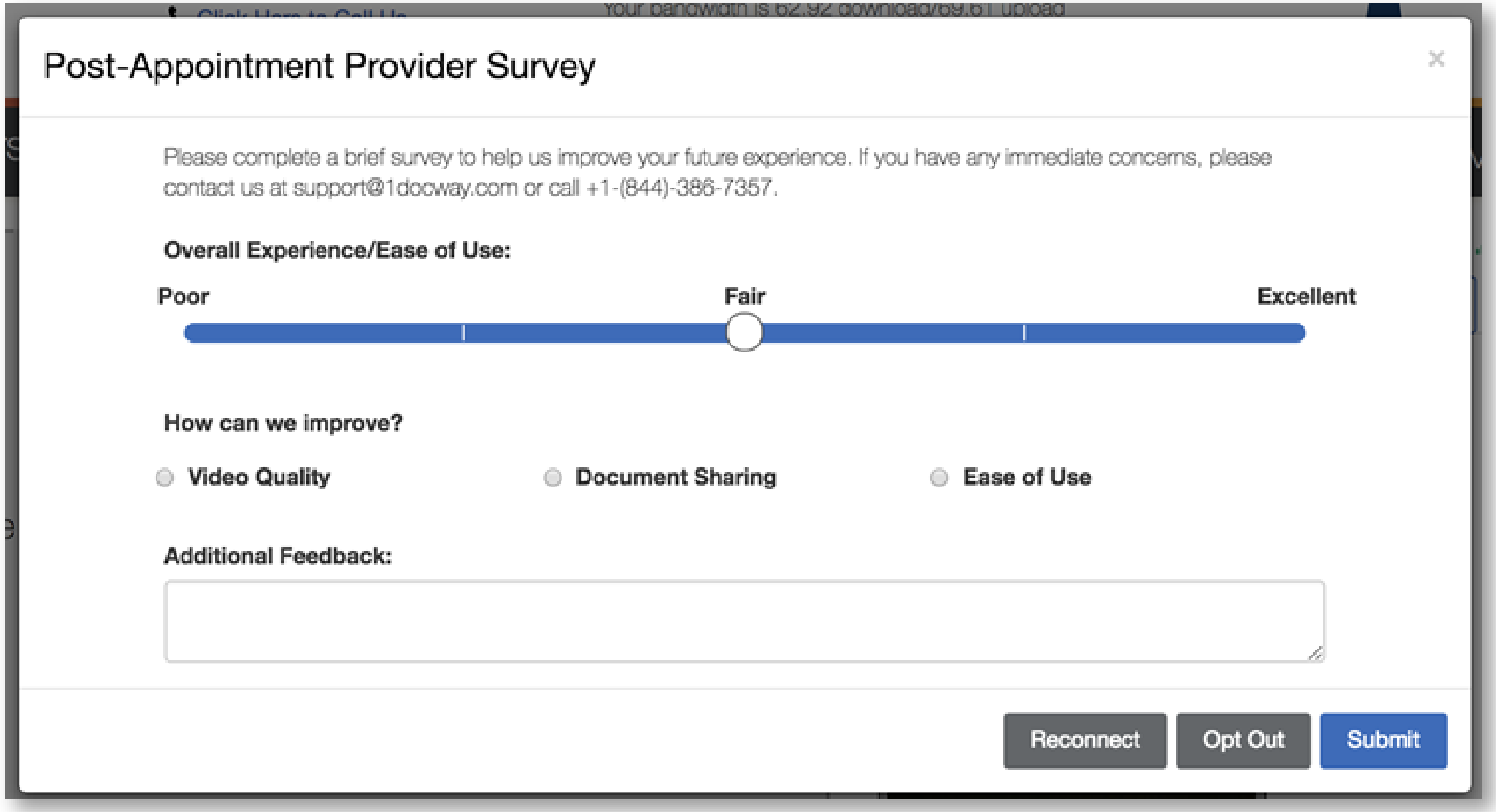
OPTUM®
BH1252_012018

Dashboard

After a provider completes an appointment:

- They will be prompted to complete a short and optional survey
- Providers can choose to opt-out if they wish
- Providers can also reconnect to the appointment by clicking **“Reconnect”**

Provider Post-Visit Survey



BH1252_012018

Agenda

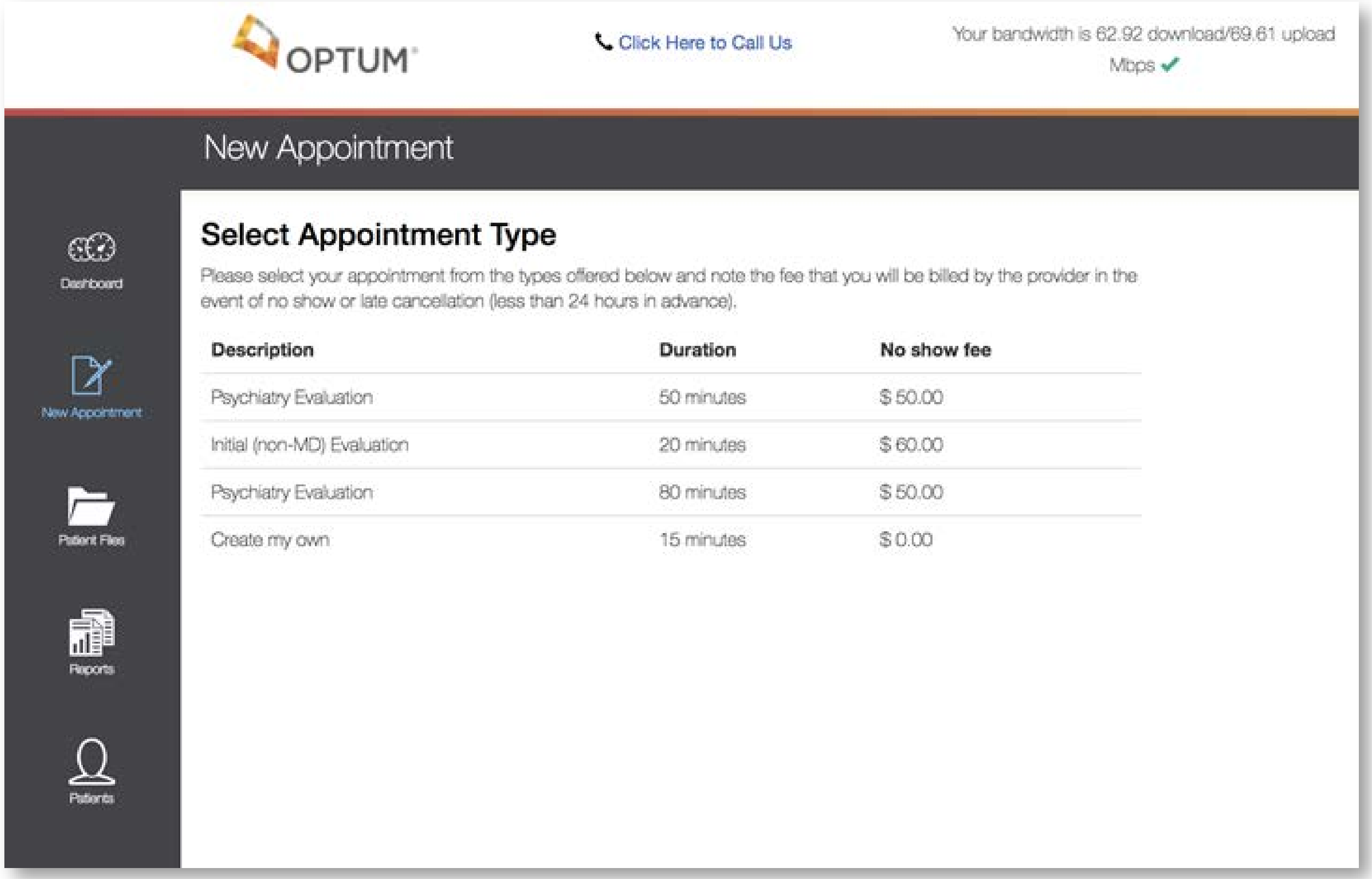
- Onboarding
- Dashboard
- **New Appointment**
- Patient Files
- Reports
- Patients
- Payments
- Settings

New Appointment

In this section, providers can:

- Schedule a new appointment
- The first section allows them to select an appointment type which includes the duration and any associated no-show or late cancellation fees

Appointment Type

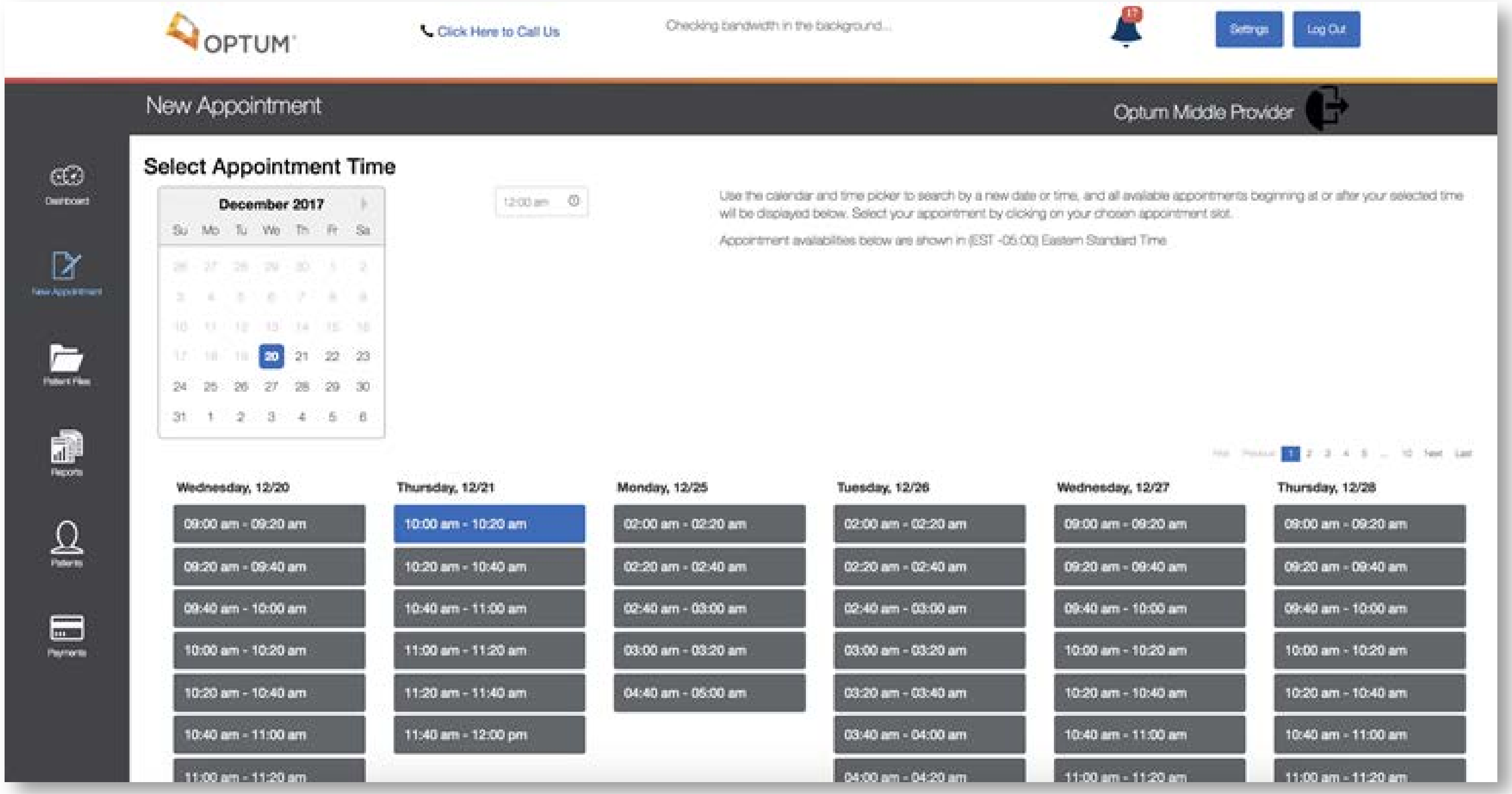


New Appointment

Appointment Date and Time

In this section, providers can:

- Schedule a new appointment
- This screen allows them to select a date and time for the appointment
- The available dates and times are based on the provider's availability schedules

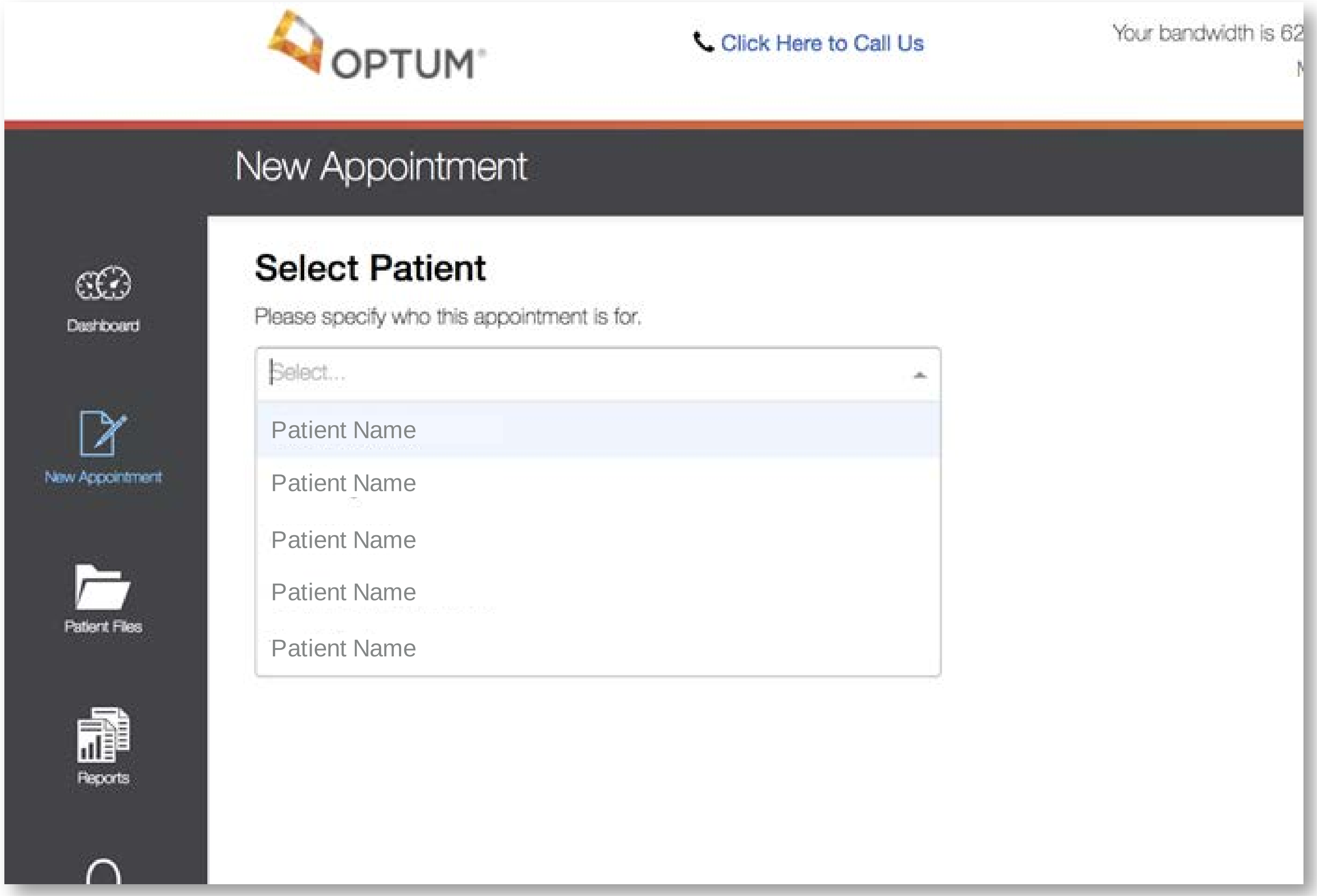


New Appointment

In this section, providers can:

- Schedule a new appointment
- This screen allows them to select the patient they would like to schedule an appointment with
- Providers can only view patients they have scheduled appointments with before

Select Patient

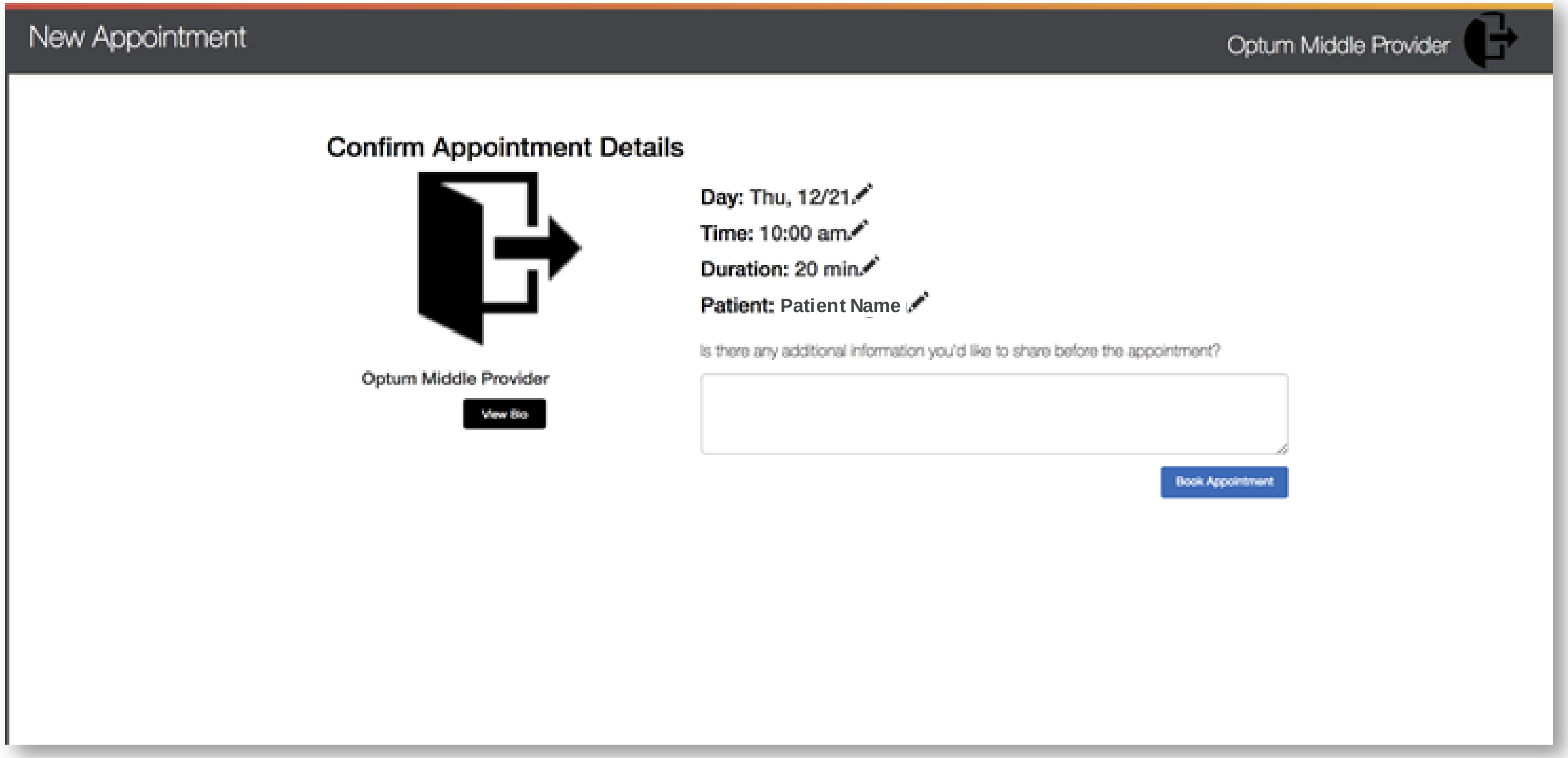


New Appointment

In this section, providers can:

- Confirm the appointment details and make changes if necessary
- If the details are correct, the provider will click "**book appointment**"
- A confirmation email will be sent to both the provider and the patient

Appointment Confirmation



Agenda

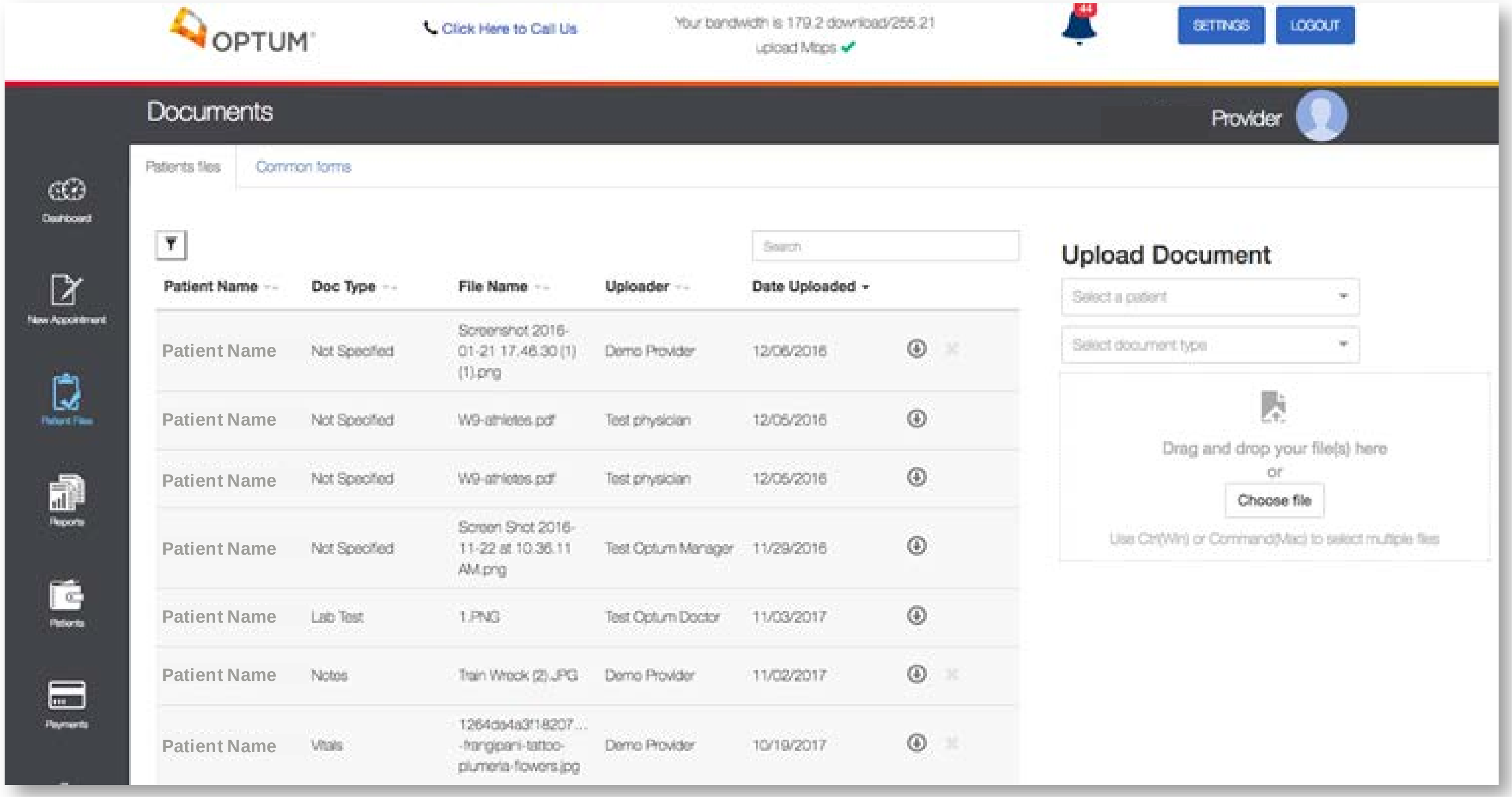
- Onboarding
- Dashboard
- New Appointment
- Patient Files
- Reports
- Patients
- Payments
- Settings

Patient Files

In this section, providers can:

- View all patient files
- Upload new patient files
- Search through patient files easily

Patient Files

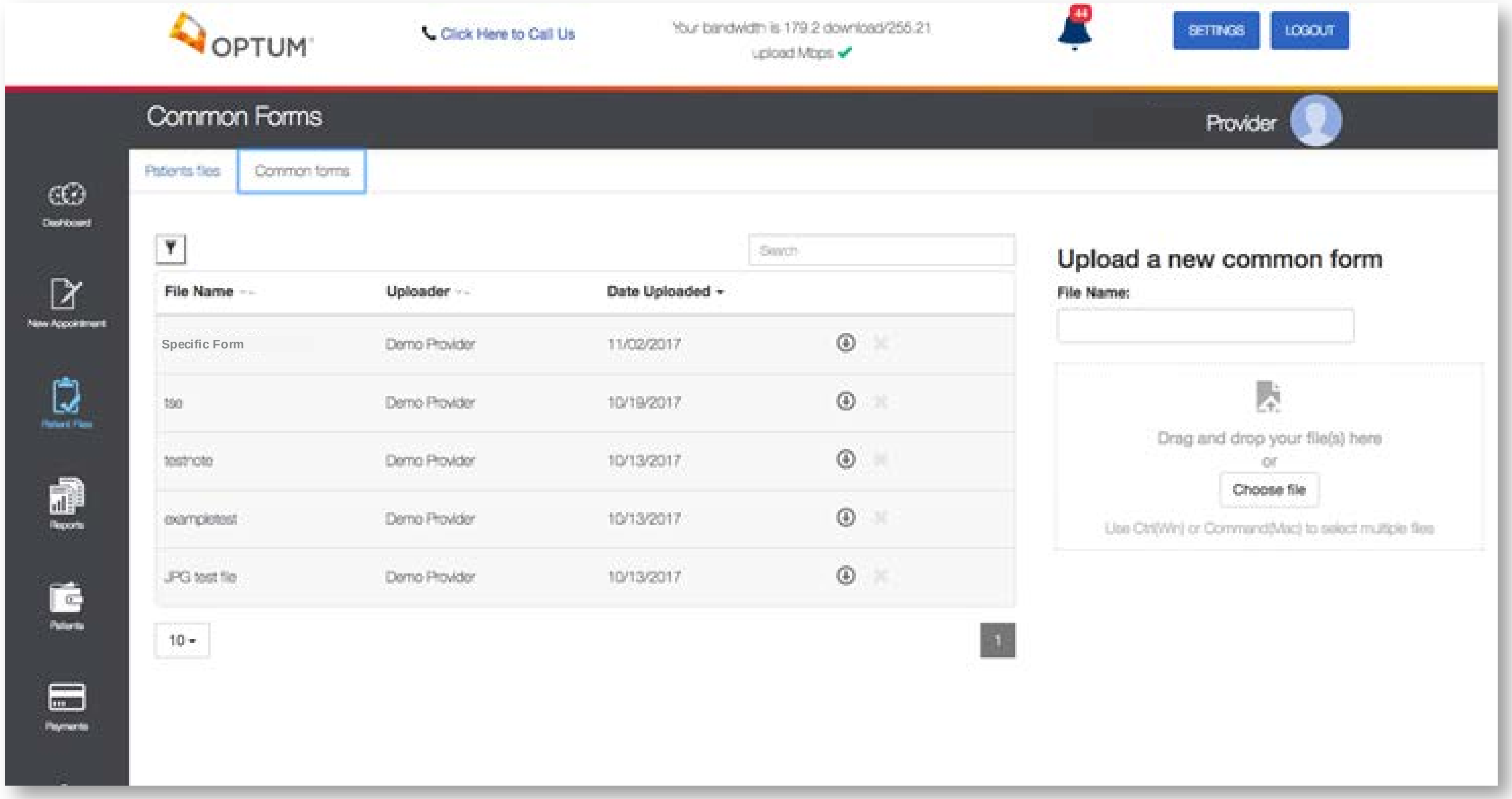


Patient Files

In this section, providers can:

- View and upload standard forms available for their patients to download and complete
- Download or delete previously loaded common forms
- Upload a new standard form

Common Forms



Agenda

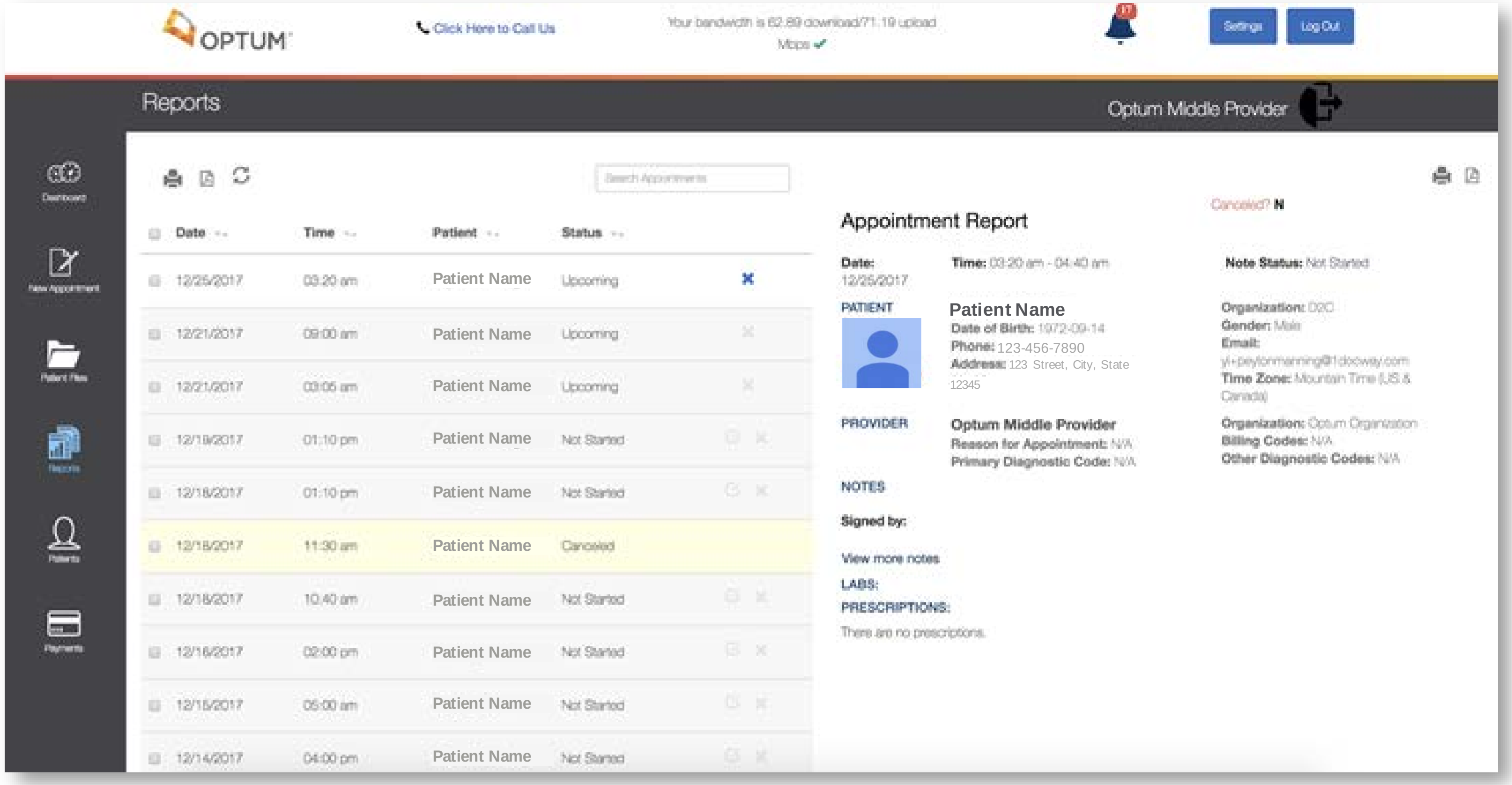
- Onboarding
- Dashboard
- New Appointment
- Patient Files
- Reports
- Patients
- Payments
- Settings

Reports

In this section, providers can:

- View a complete list of reports that are generated for each appointment scheduled or completed
- Cancel upcoming appointments
- Edit note
- View detailed reports

Accessing Information



Agenda

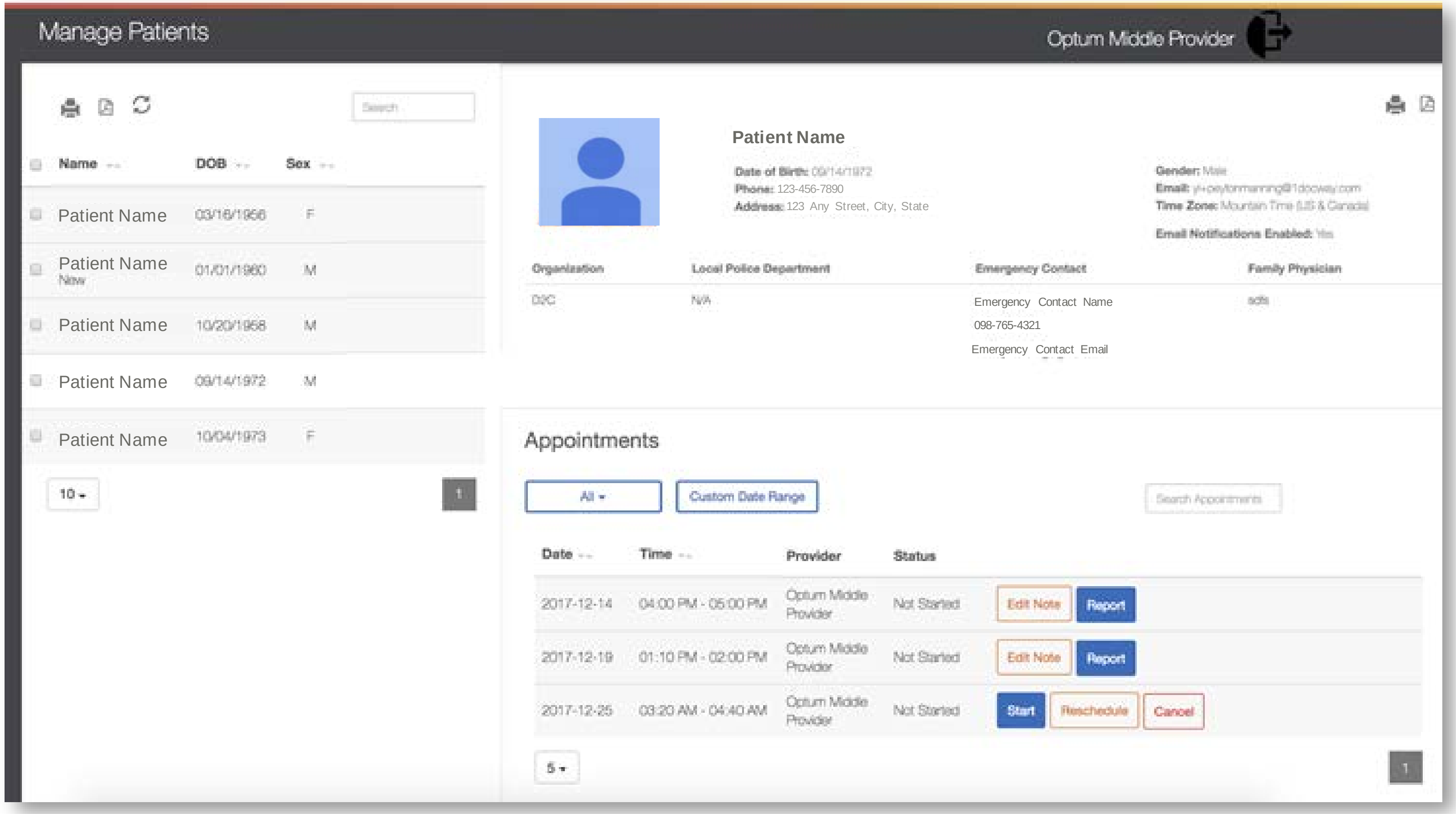
- Onboarding
- Dashboard
- New Appointment
- Patient Files
- Reports
- **Patients**
- Payments
- Settings

Patients

In this section, providers can:

- View a complete list of their patients
- View a detailed summary of the patients information and appointment history
- Launch eRx to view or manage prescriptions for the patient

Detailed Patient Information



Agenda

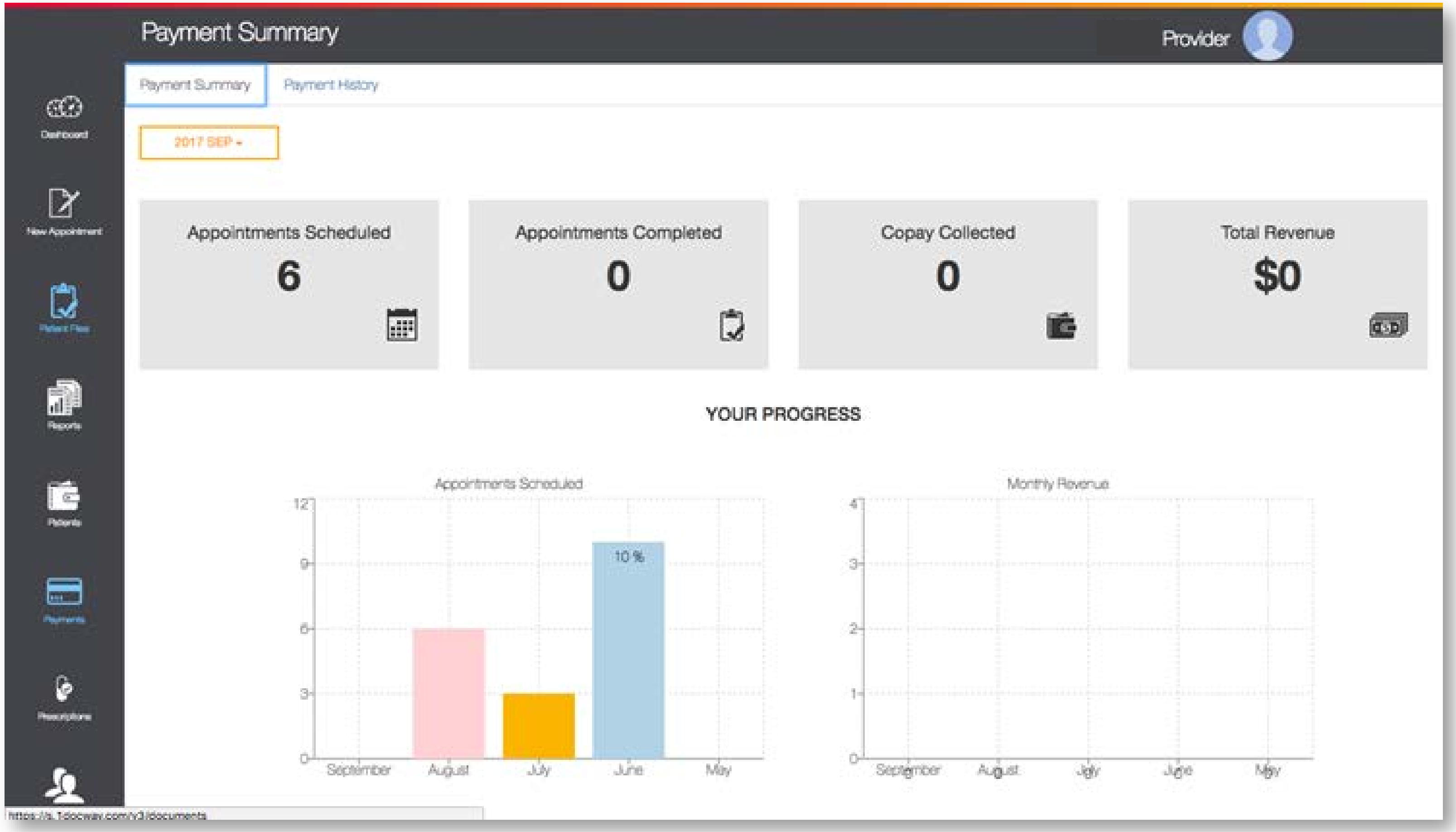
- Onboarding
- Dashboard
- New Appointment
- Patient Files
- Reports
- Patients
- **Payments**
- Settings

Payments

In this section, providers can:

- View a summary of their appointments and payment data
- View a comparative analysis of their appointments and revenue month over month to track progress

Payment Summary



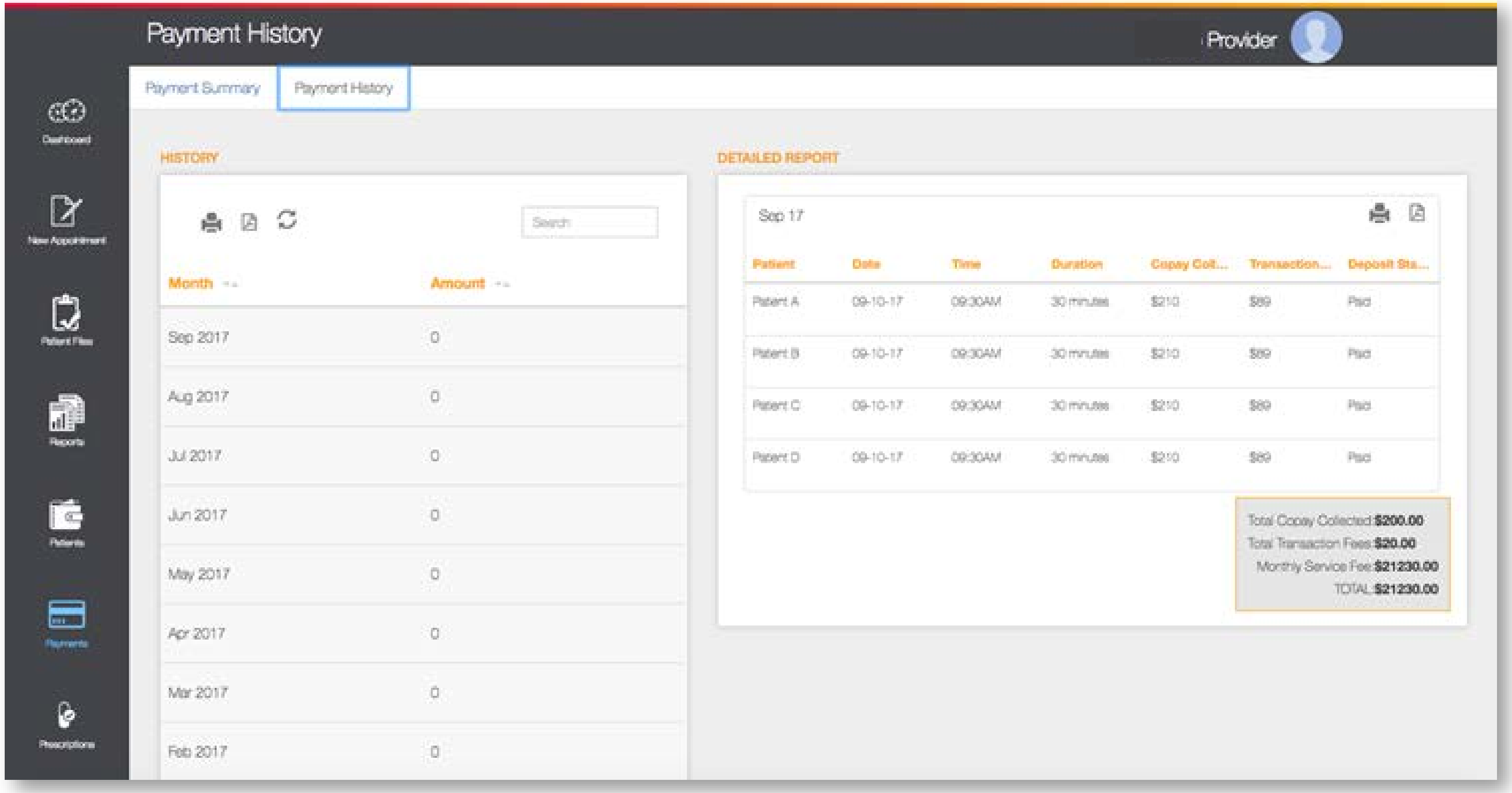
OPTUM®
BH1252_012018

Payments

In this section, providers can:

- View a table of monthly payment reports
- View a deposit breakdown for each appointment completed as well as any transaction fees incurred within the month selected

Payment History



Agenda

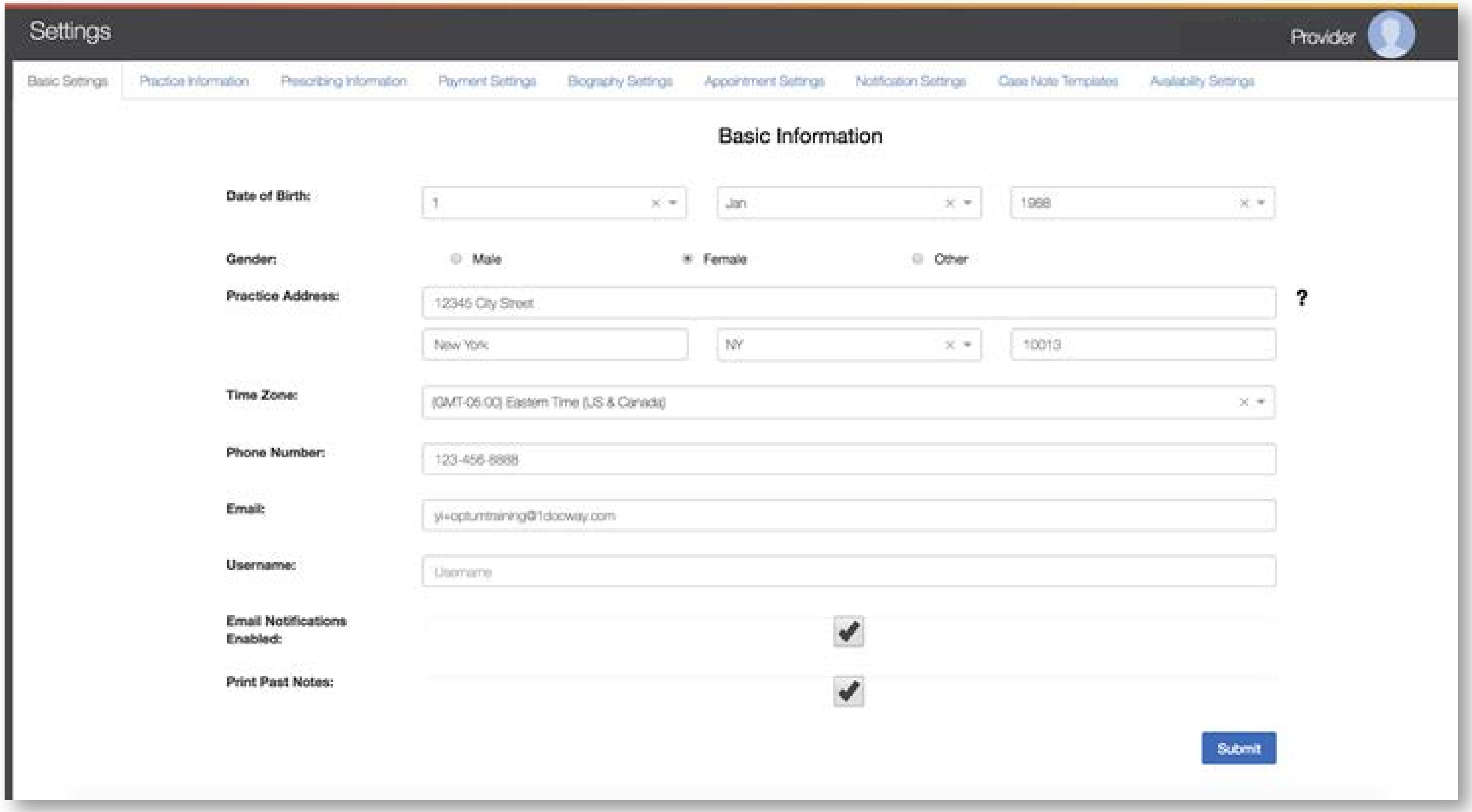
- Onboarding
- Dashboard
- New Appointment
- Patient Files
- Reports
- Patients
- Payments
- **Settings**

Settings

In this section, providers can:

- Modify basic demographic information such as their Birthday, Address, Phone number, email etc.

Basic Settings

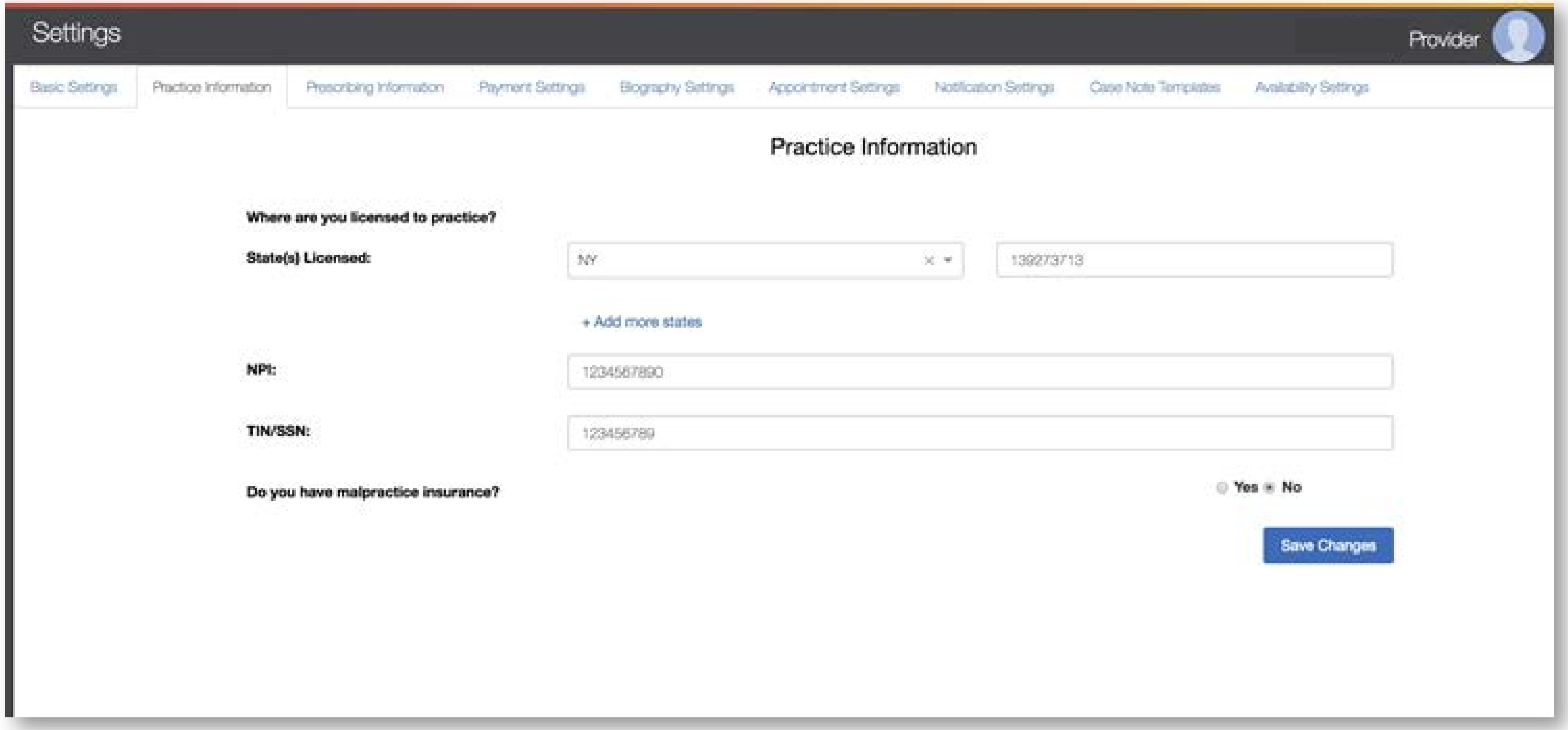


Settings

In this section, providers can:

- Modify or update practice information including license information, state licenses, NPI number, and malpractice insurance information

Practice Settings

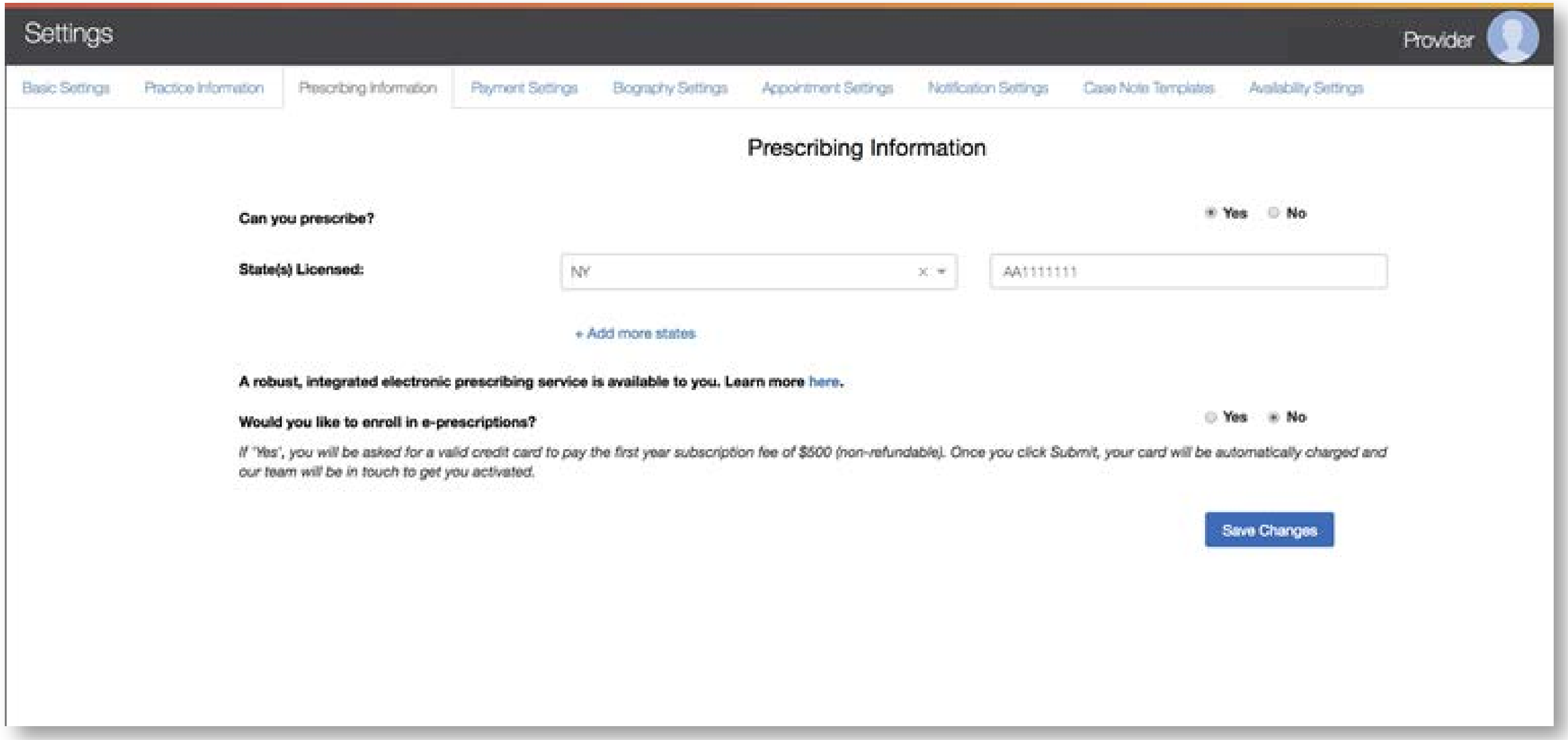


Settings

In this section, providers can:

- Manage or cancel their subscription to Rcopia's e-prescriptions service and view stored payment information
- If they chose not to opt-in during the onboarding process, they can subscribe here at any time

Prescribing Settings

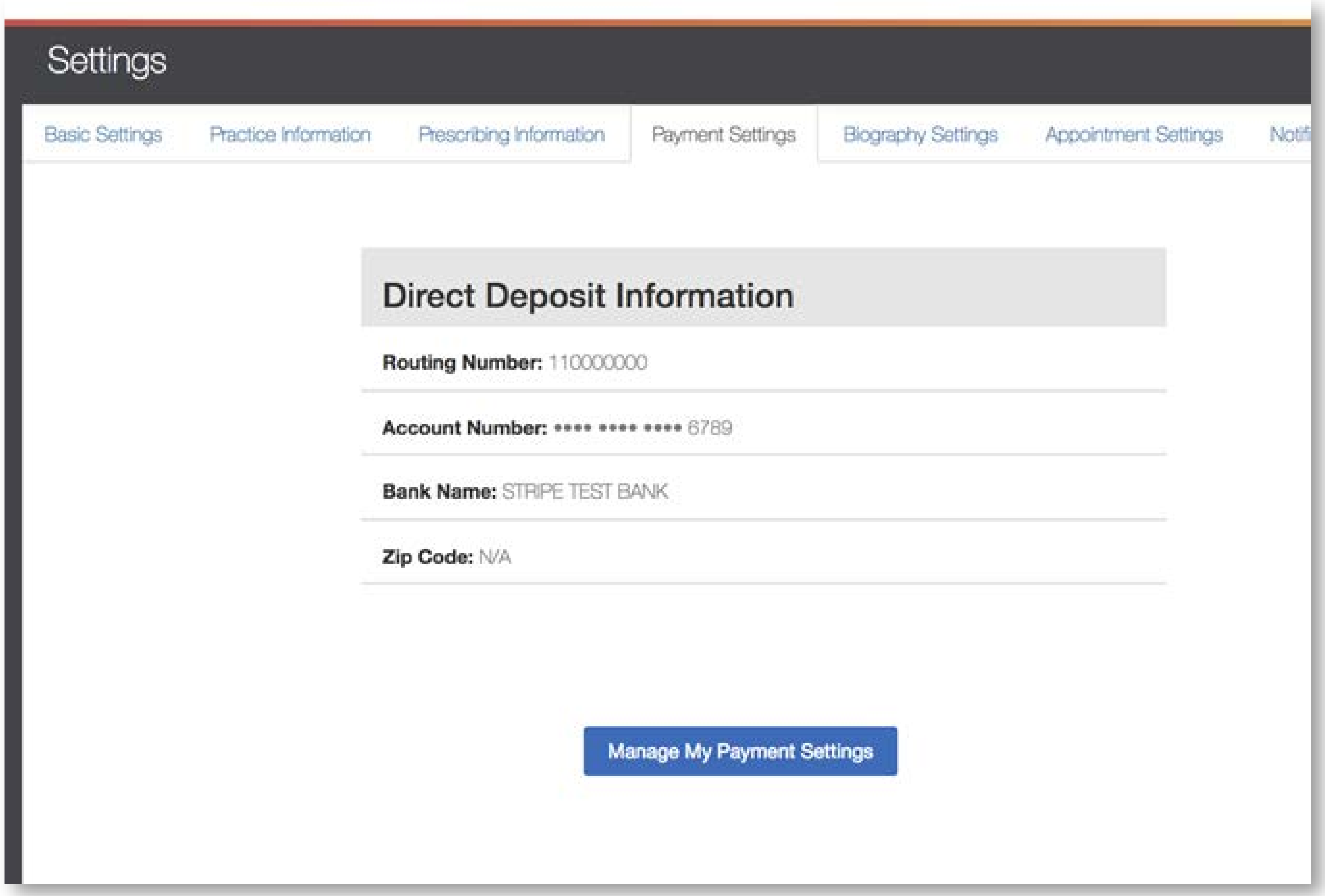


Settings

In this section, providers can:

- View payment information including direct deposit information and the credit card stored on file
- To update this info, they have to update directly in Stripe

Payment Settings

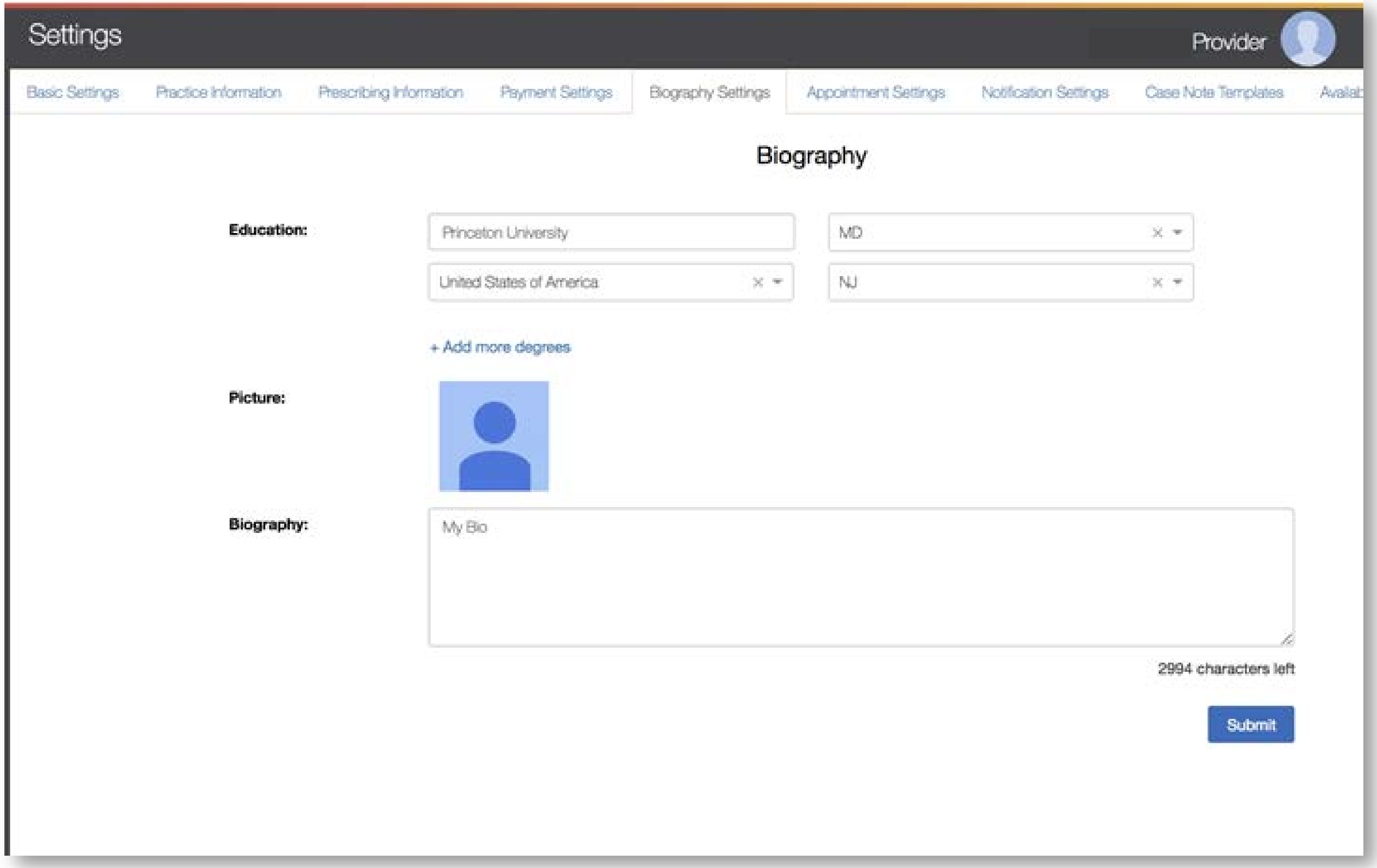


Settings

In this section, providers can:

- Update their biography and profile picture
- Add additional degrees to their education credentials by adding more rows

Biography Settings

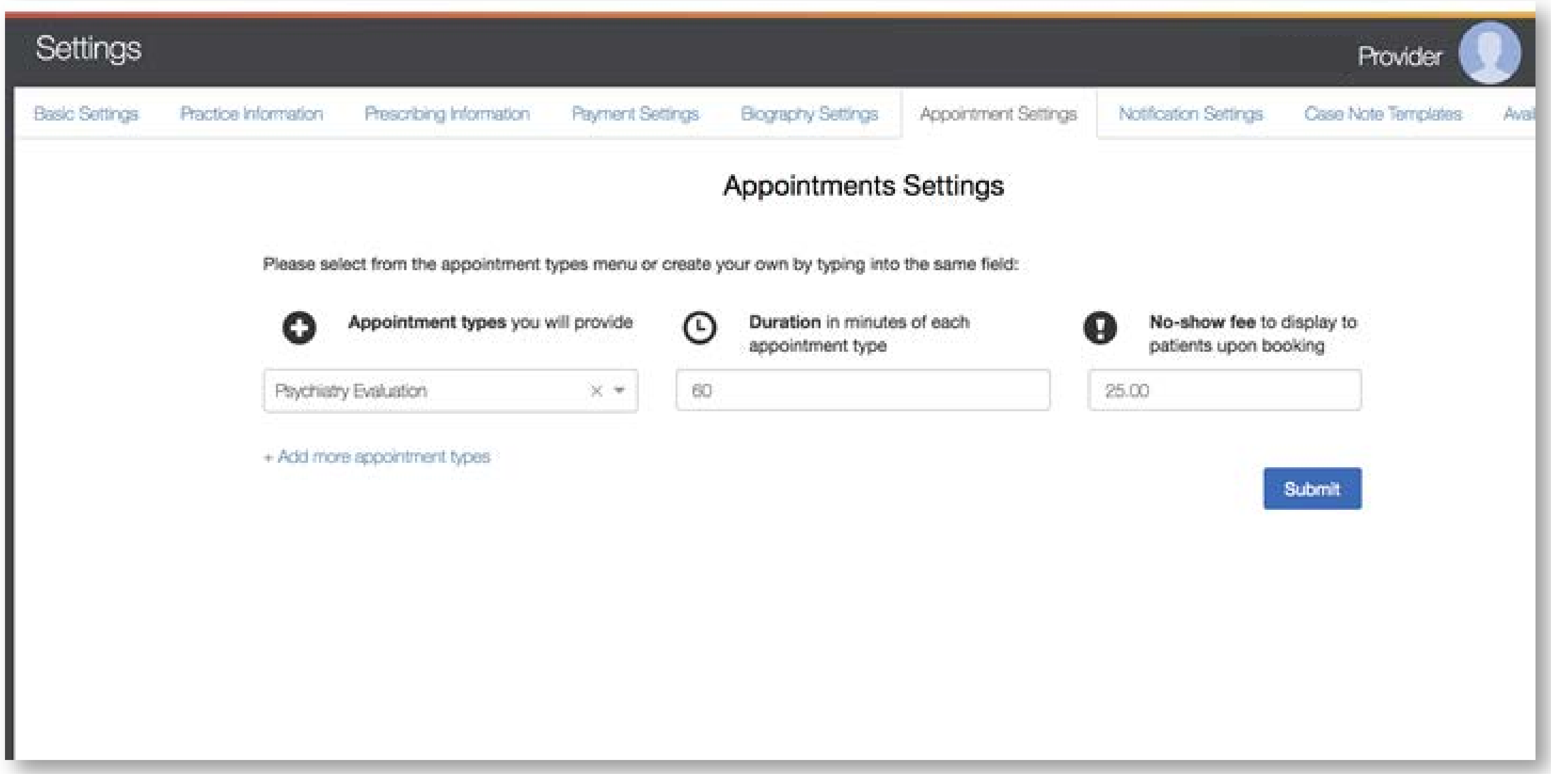


Settings

In this section, providers can:

- Change or add appointment types and durations
- Manage the optional no-show and cancellation fees
- Providers will be responsible for billing patients any no-show or cancellation fees

Appointment Type Settings

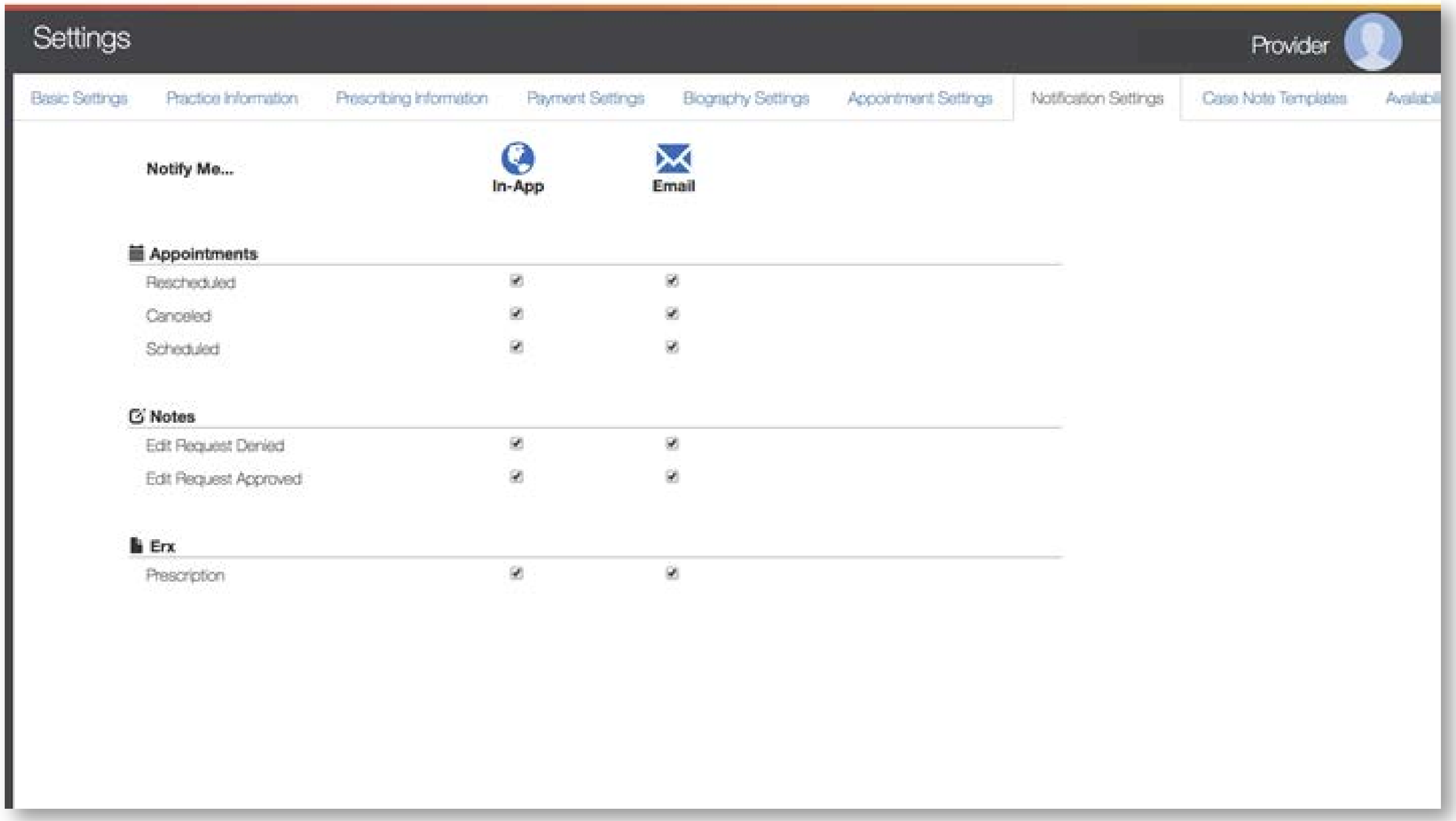


Settings

In this section, providers can:

- Manage which notifications they receive via email and which notifications they will receive within the portal

Notification Settings

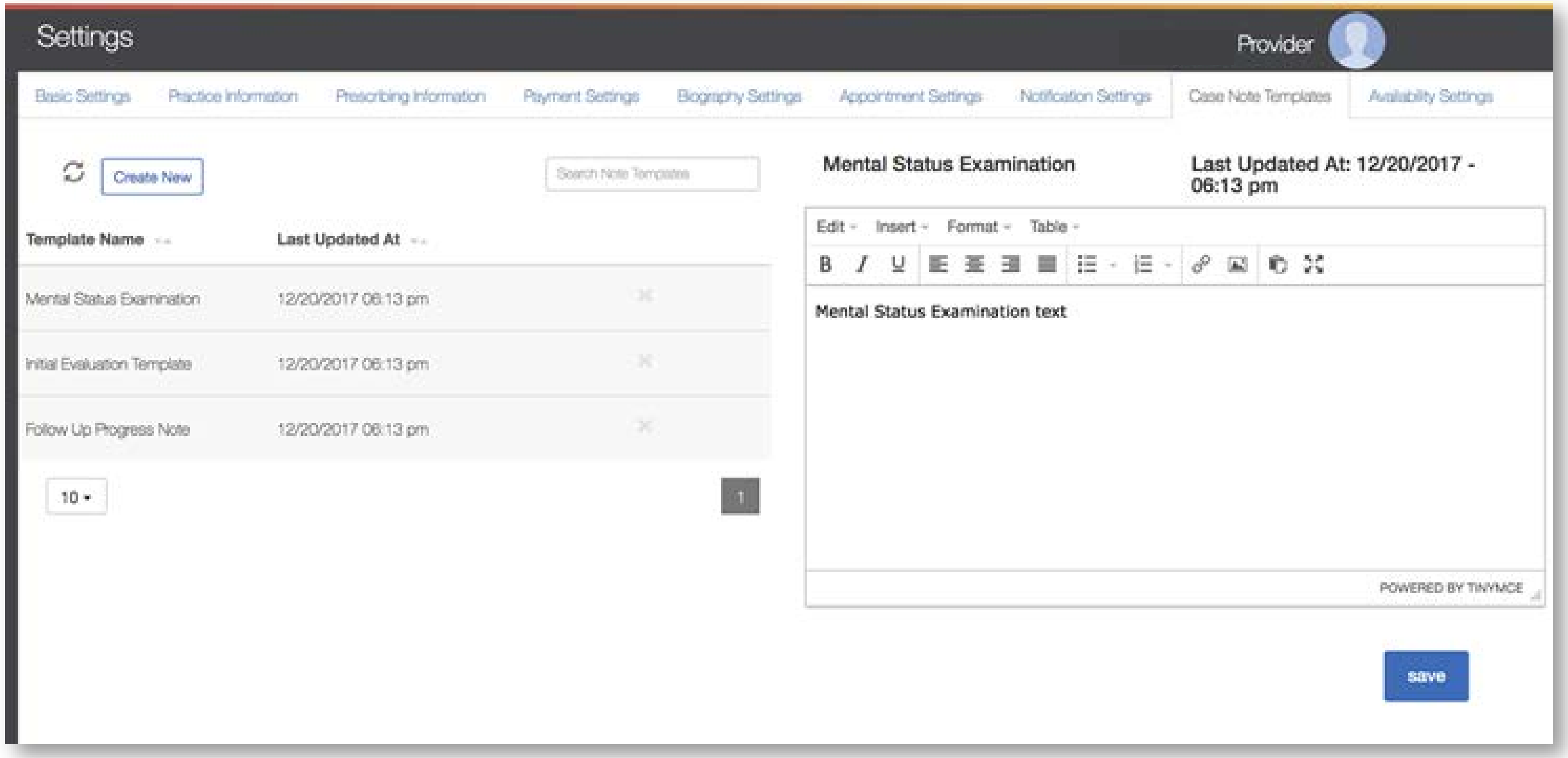


Settings

In this section, providers can:

- Add new case note templates to use during appointments
- Once a new template is loaded here, it will show in the list of note templates available when a provider selects the "note" tab in the appointment chat page

Case Note Templates



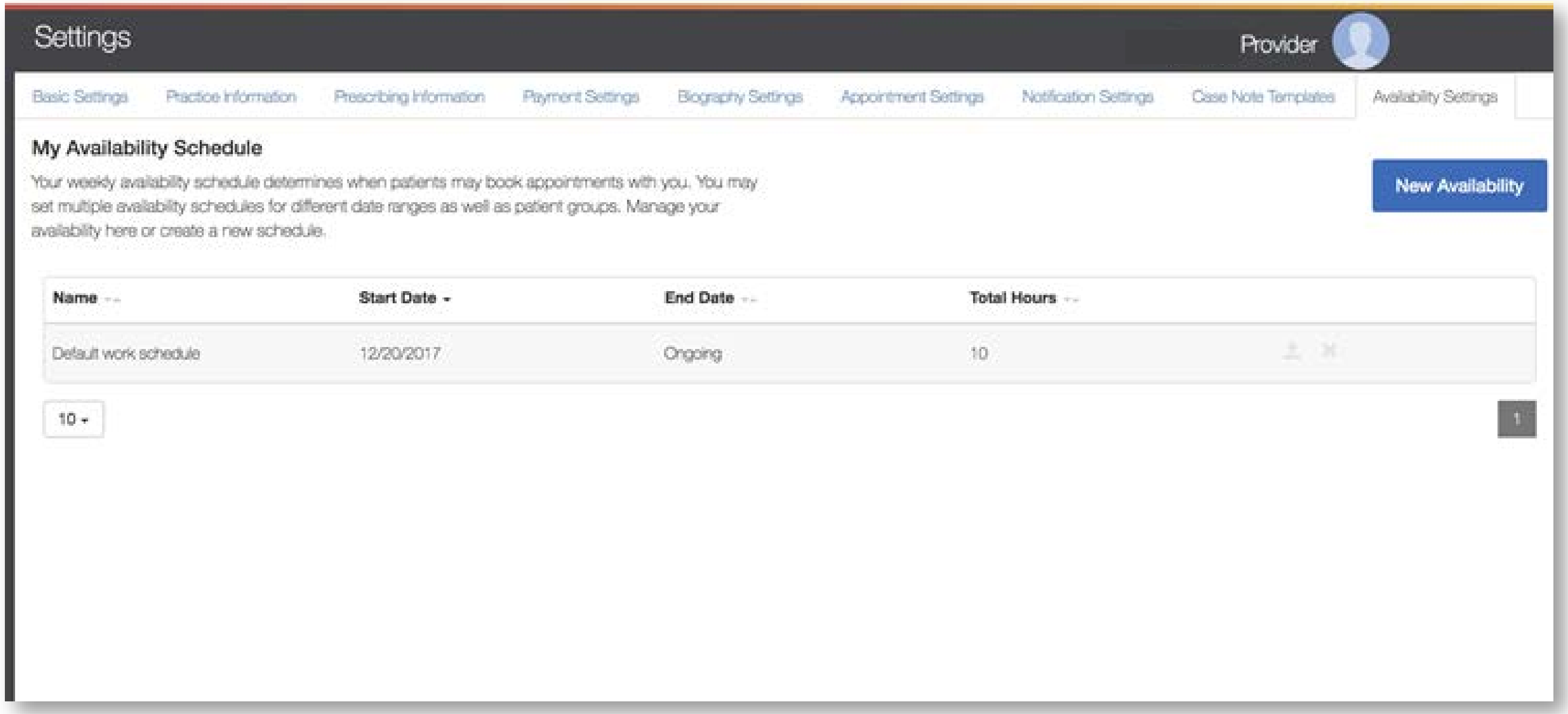
BH1252_012018

Settings

In this section, providers can:

- View and update any existing availability schedules
- Create new schedules to reflect the provider's future availability

Availability Settings

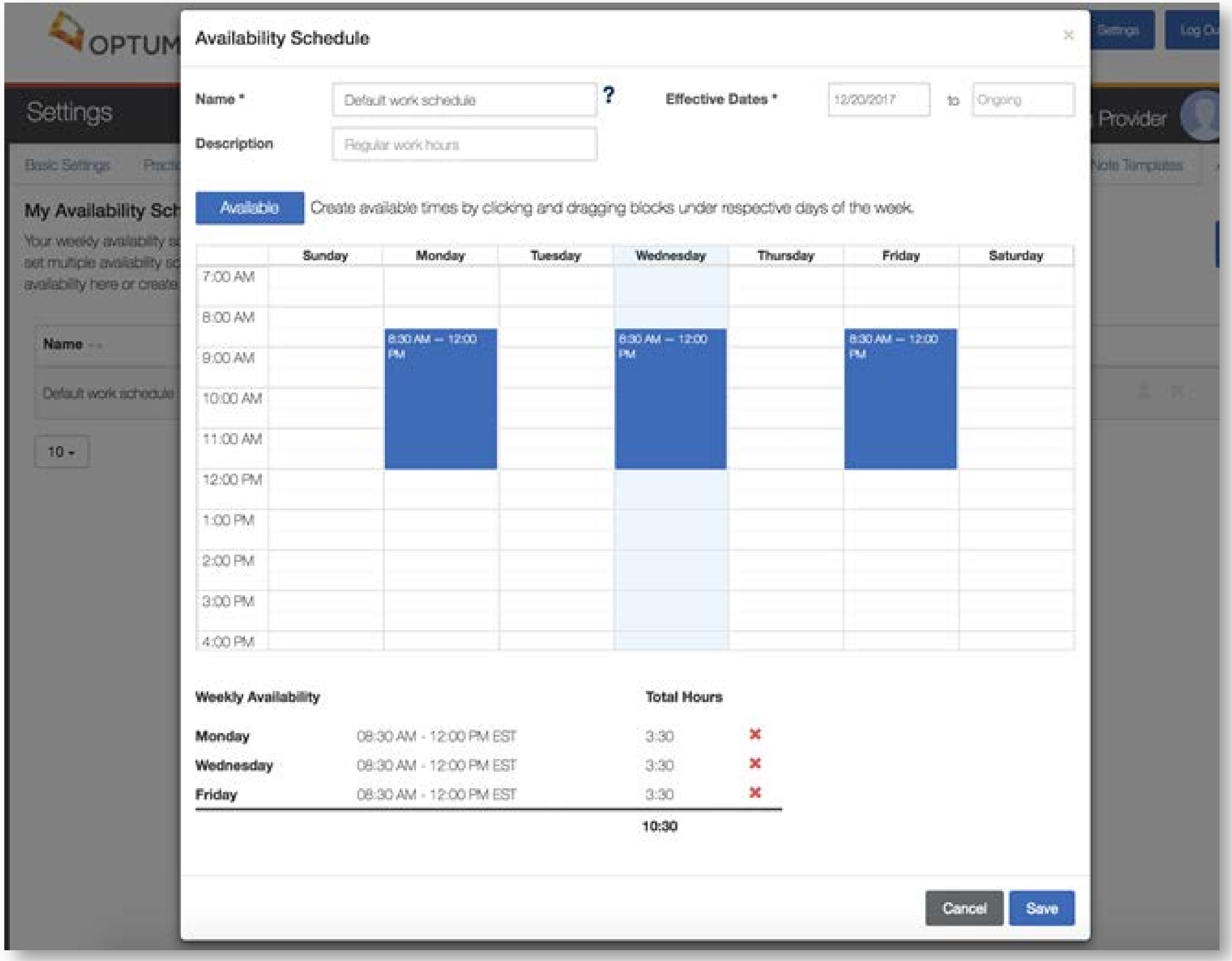


Settings

In this section, providers can:

- View and update any existing availability schedules
- Create new schedules to reflect the provider's future availability

Availability Settings - New Availability



OPTUM®

Questions?

Thank you.