



# OPTUM Training Session

virtual visits: Provider Portal Training Guide



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## Provider Portal Overview

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## 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.

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## Agenda



Onboarding



Dashboard



New Appointment



Patient Files



Reports



Patients



Payments



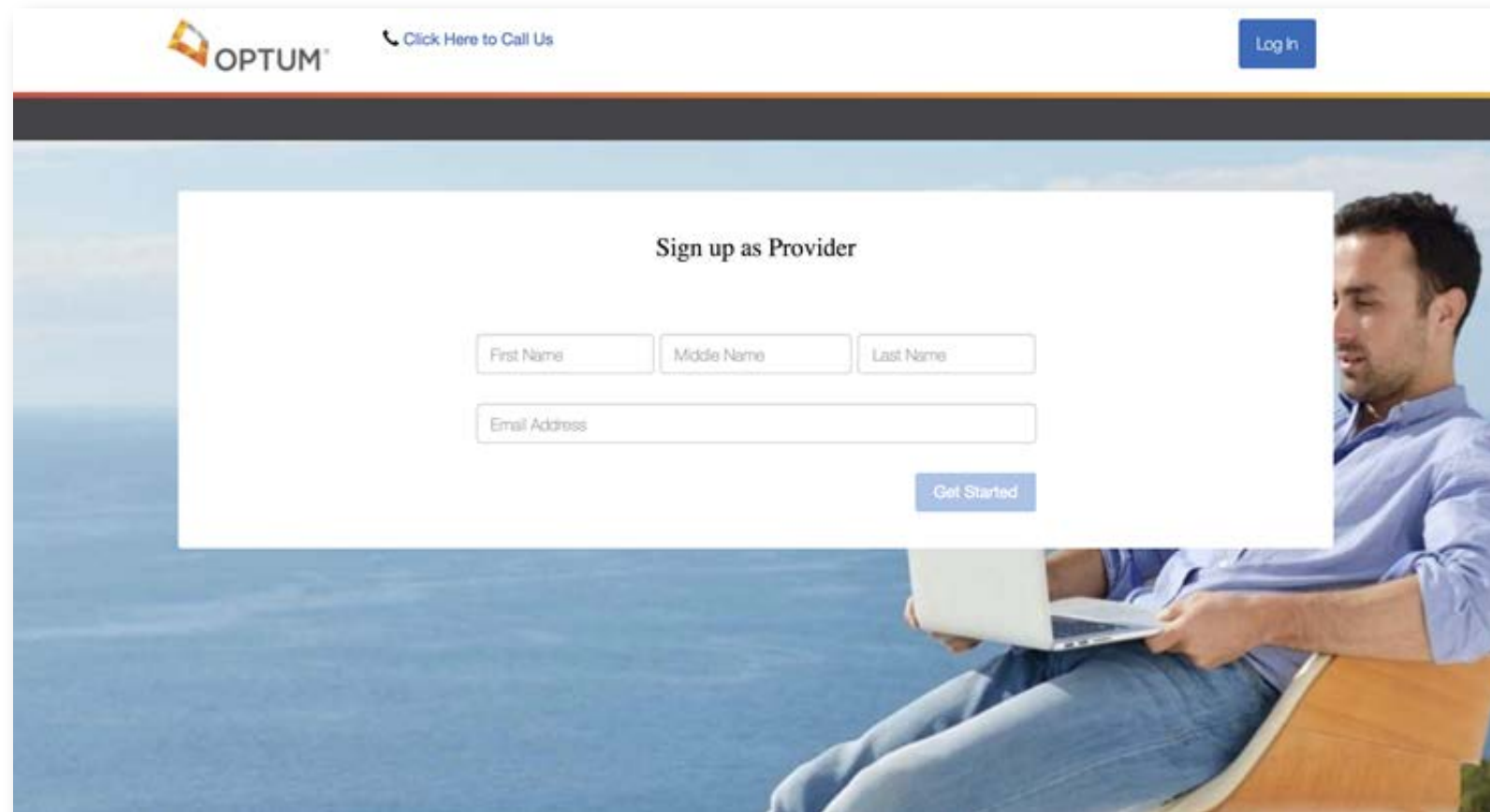
Settings

## Onboarding

In this section, providers can:

- Sign up for virtual visits and begin the onboarding process

## Sign Up



The screenshot shows the Optum website's sign-up interface. At the top left is the Optum logo, followed by a "Click Here to Call Us" link and a "Log In" button. The main content area features a "Sign up as Provider" form with input fields for "First Name", "Middle Name", "Last Name", and "Email Address", and a "Get Started" button. The background of the page shows a man in a blue shirt sitting in a chair and using a laptop, with a blue sky and ocean in the background.

## 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

### Register With virtual visits

Welcome to the Optum Virtual Visits provider portal. We appreciate your choice to join our telehealth community and will devote our full energy to helping you provide the highest quality care and experience to your patients. We know the registration process may seem overwhelming, but no worries - we'll try to make it as painless as possible. However, we do need to collect some information first in the following few pages, so that you will be all set up to conduct your appointment the next time you log in.

The entire process will take 10 to 15 minutes. To speed things up, here's what you will need:

- Your contact information including email and practice address.
- Your practice licensure information, TIN/SSN, and NPI.
- Your prescribing licensure information (and a credit card to sign up for e-prescriptions service if you choose).
- A profile picture and biography that you'd like to show patients.
- Your weekly availability schedule.
- Your appointment preferences and no show fee.
- Your banking information to sign up for secure and fast direct deposits.

After the email verification, you may return to a previous step to make any edits and continue forward by clicking the 'Submit' button.

Take our proverbial hand and we'll walk you through the entire process. Your virtual practice is only a few pages away.

Let's Begin

## Onboarding

In this section, providers can:

- Review the confidentiality agreement prior to registration

## Confidentiality

### 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

**Create Account**

**Full Name:** Training Middle Name Provider

**Email Address:** yi+optumtraining@1docway.com ?

Re-enter Email Address

**Password:** Enter Password ?

Re-enter Password

Submit

1 Create Account 2 Basic Info 3 Practice Info 4 Prescribing Info 5 Biography 6 Availability Settings 7 Appointment Settings 8 Billing 9 Tech Requirements



## Onboarding

In this section, providers can:

- Verify their email address

## Verify Email

### Verification link sent - please check your email

Sometimes it can take a couple of minutes for the verification email to show up. If you don't see it, try refreshing your inbox.



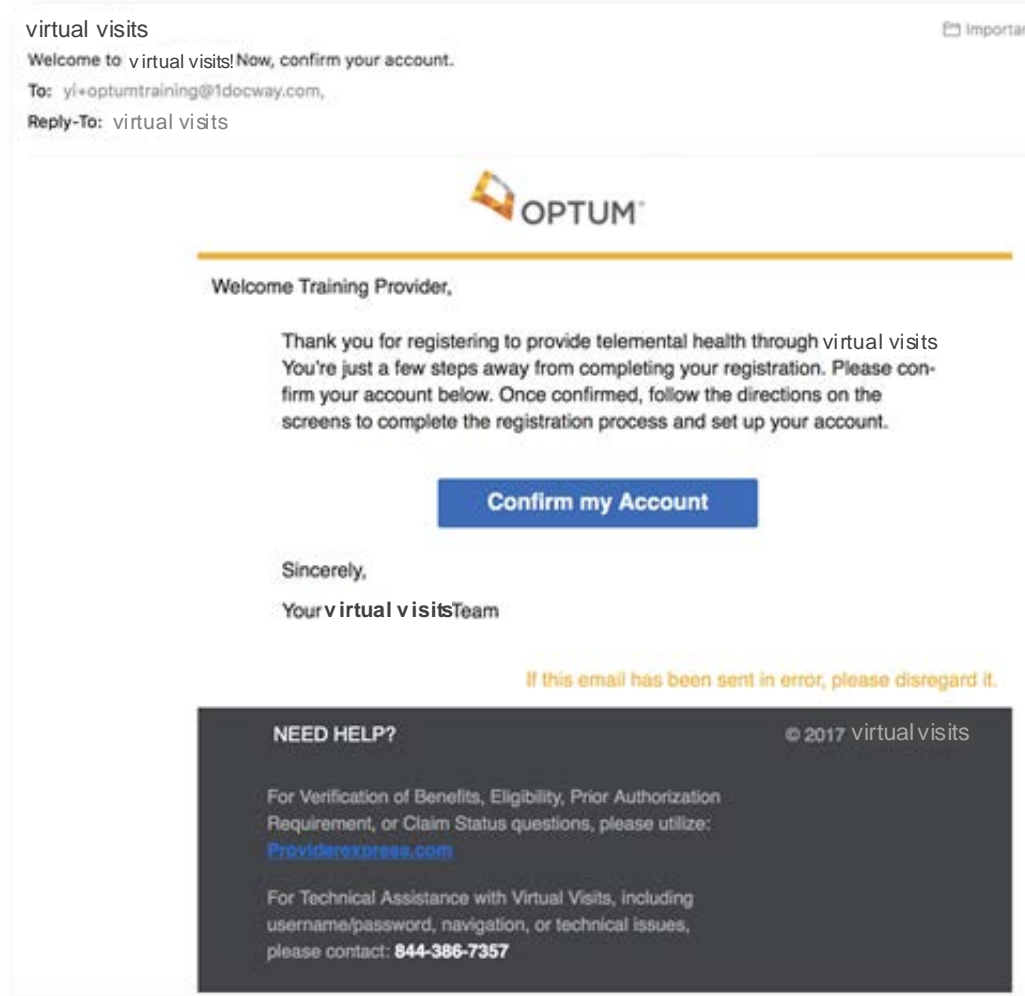


## Onboarding

In this section, providers can:

- Verify their email address

## Verify Email



## Onboarding

In this section, providers can:

- Verify their email address

## Verify Email

Your email has been successfully verified!

[Get Started](#)

## Onboarding

In this section, providers can:

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

## Basic Information

### Basic Information

**Date of Birth:**

**Gender:**  Male  Female  Other

**Practice Address:**  ?

**Time Zone:**

**Phone Number:**

① Create Account ② Basic Info ③ Practice Info ④ Prescribing Info ⑤ Biography ⑥ Availability Settings  
⑦ Appointment Settings ⑧ Billing ⑨ Tech Requirements

## Onboarding

In this section, providers can:

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

## Practice Information

The screenshot shows a web form titled "Practice Information" with a "<< Back" link at the top left. The form contains the following fields and options:

- Where are you licensed to practice?**
  - State(s) Licensed:** A dropdown menu showing "NY" with a close button (x) and a plus sign (+).
  - A text input field containing "139273713".
  - A link: "+ Add more states".
- NPI:** A text input field containing "1234567890".
- TIN/SSN:** A text input field containing "123456789".
- Do you have malpractice insurance?** Radio buttons for "Yes" and "No", with "No" selected.
- A blue "Submit" button.

At the bottom of the form is a progress bar with 9 steps:

- 1 Create Account
- 2 Basic Info
- 3 Practice Info (highlighted in blue)
- 4 Prescribing Info
- 5 Biography
- 6 Availability Settings
- 7 Appointment Settings
- 8 Billing
- 9 Tech Requirements

## 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

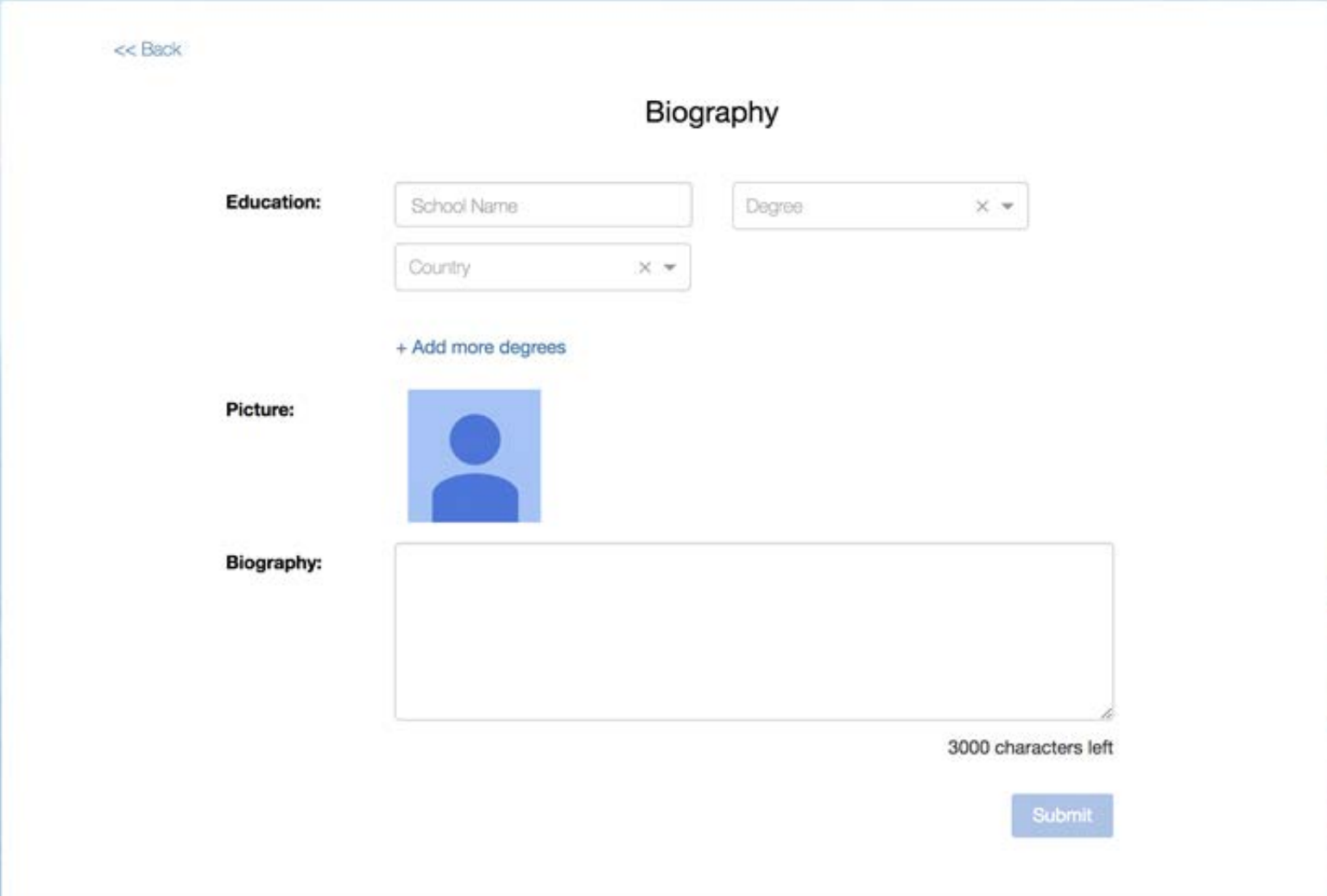
The screenshot shows a web form titled "Prescribing Information". At the top left is a "<< Back" link. The main heading is "Prescribing Information". Below this is a question: "Can you prescribe?" with radio buttons for "Yes" (selected) and "No". Underneath is a "State(s) Licensed:" section with a dropdown menu showing "NY" and a "DEA #" input field. A "+ Add more states" link is below the dropdown. A paragraph of text states: "A robust, integrated electronic prescribing service is available to you. Learn more here." Below this is another question: "Would you like to enroll in e-prescriptions?" with radio buttons for "Yes" (selected) and "No". A note below reads: "If 'Yes', you will be asked for a valid credit card to pay the first year subscription fee of \$500 (non-refundable). Once you click Submit, your card will be automatically charged and our team will be in touch to get you activated." The form includes a "Purchase eRx now for \$500" label, a credit card icon, and input fields for "Card number" and "MM / YY CVC". A "Submit" button is at the bottom right. At the bottom of the form is a progress bar with 9 steps: 1 Create Account, 2 Basic Info, 3 Practice Info, 4 Prescribing Info (highlighted in blue), 5 Biography, 6 Availability Settings, 7 Appointment Settings, 8 Billing, and 9 Tech Requirements.

## Onboarding

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

## Provider Biography



The screenshot shows a web form titled "Biography" with a "<< Back" link in the top left. The form is organized into three main sections: "Education", "Picture", and "Biography".

- Education:** This section contains three input fields: "School Name" (a text box), "Degree" (a dropdown menu with an "x" icon), and "Country" (a dropdown menu with an "x" icon). Below these fields is a link that says "+ Add more degrees".
- Picture:** This section features a blue square placeholder icon representing a profile picture.
- Biography:** This section consists of a large, empty text area for writing the biography. At the bottom right of this area, it indicates "3000 characters left".

A blue "Submit" button is located at the bottom right of the form.

## Onboarding

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

## Provider Availability

The screenshot shows the 'Availability Settings' page. At the top, there is a '<< Back' link. The main title is 'Availability Settings'. Below the title, there are input fields for 'Name \*' (containing 'Default work schedule'), 'Effective Dates \*' (from '12/20/2017' to 'Ongoing'), and 'Description' (containing 'Regular work hours'). A blue button labeled 'Available' is followed by the instruction: 'Create available times by clicking and dragging blocks under respective days of the week.' Below this is a calendar grid with columns for Sunday through Saturday and rows for time slots from 7:00 AM to 3:00 PM. Blue blocks are placed on Monday, Wednesday, and Friday, each labeled '8:30 AM - 12:00 PM'. At the bottom right of the grid is a 'Submit' button. Below the grid is a summary table:

Weekly Availability		Total Hours	
Monday	08:30 AM - 12:00 PM EST	3:30	✘
Wednesday	08:30 AM - 12:00 PM EST	3:30	✘
Friday	08:30 AM - 12:00 PM EST	3:30	✘



## 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

The screenshot shows the 'Appointment Settings' page. At the top left is a '<< Back' link. The main heading is 'Appointments Settings'. Below this is a prompt: 'Please select from the appointment types menu or create your own by typing into the same field:'. There are three columns of settings:

<b>+</b> Appointment types you will provide	<b>L</b> Duration in minutes of each appointment type	<b>!</b> No-show fee to display to patients upon booking
Psychiatry Evaluation × ▾	60	25 ×
Appointment Type × ▾	Minutes	USD (\$) ×

Below the table is a '+ Add more appointment types' link and a 'Submit' button. At the bottom, a progress bar shows steps 1 through 9: 1 Create Account, 2 Basic Info, 3 Practice Info, 4 Prescribing Info, 5 Biography, 6 Availability Settings, 7 Appointment Settings (highlighted), 8 Billing, and 9 Tech Requirements.

## 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

The screenshot shows a web interface for setting up payments. At the top left is a '<< Back' link. The main heading is 'Billing & Payments'. Below the heading is a message: 'We use Stripe to make sure you get paid on time and keep your personal and bank details secure.' A prominent blue button labeled 'Set Up Payments on Stripe' is centered on the page. At the bottom, a progress bar consists of nine chevron-shaped steps: 1 Create Account, 2 Basic Info, 3 Practice Info, 4 Prescribing Info, 5 Biography, 6 Availability Settings, 7 Appointment Settings, 8 Billing (highlighted in blue), and 9 Tech Requirements.

## 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

The screenshot shows the Stripe onboarding interface for setting up payments for Virtual Visits. The interface is divided into two main sections: a progress indicator on the left and a form on the right.

**Progress Indicator:**

- ✓ Create your Virtual Visits account
- Create your Stripe account
- Ready to get paid

**Form Section:**

Share a few basic details about yourself. TEST MODE

Legal name	Optum
	Provider
Date of birth	11 / 22 / 1988 <small>MM / DD / YYYY</small>

Where should we send your payouts?

Send to: Debit card  Bank account

MEMO

< 111000000 < 000123456789 - 1234

ROUTING ACCOUNT

Routing number	110000000
Account number	000123456789
Confirm account number	000123456789

[Privacy policy](#) [Contact us](#)

[CREATE ACCOUNT →](#)

## 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

<< Back

You're ready to get paid!

Set Up My Technology

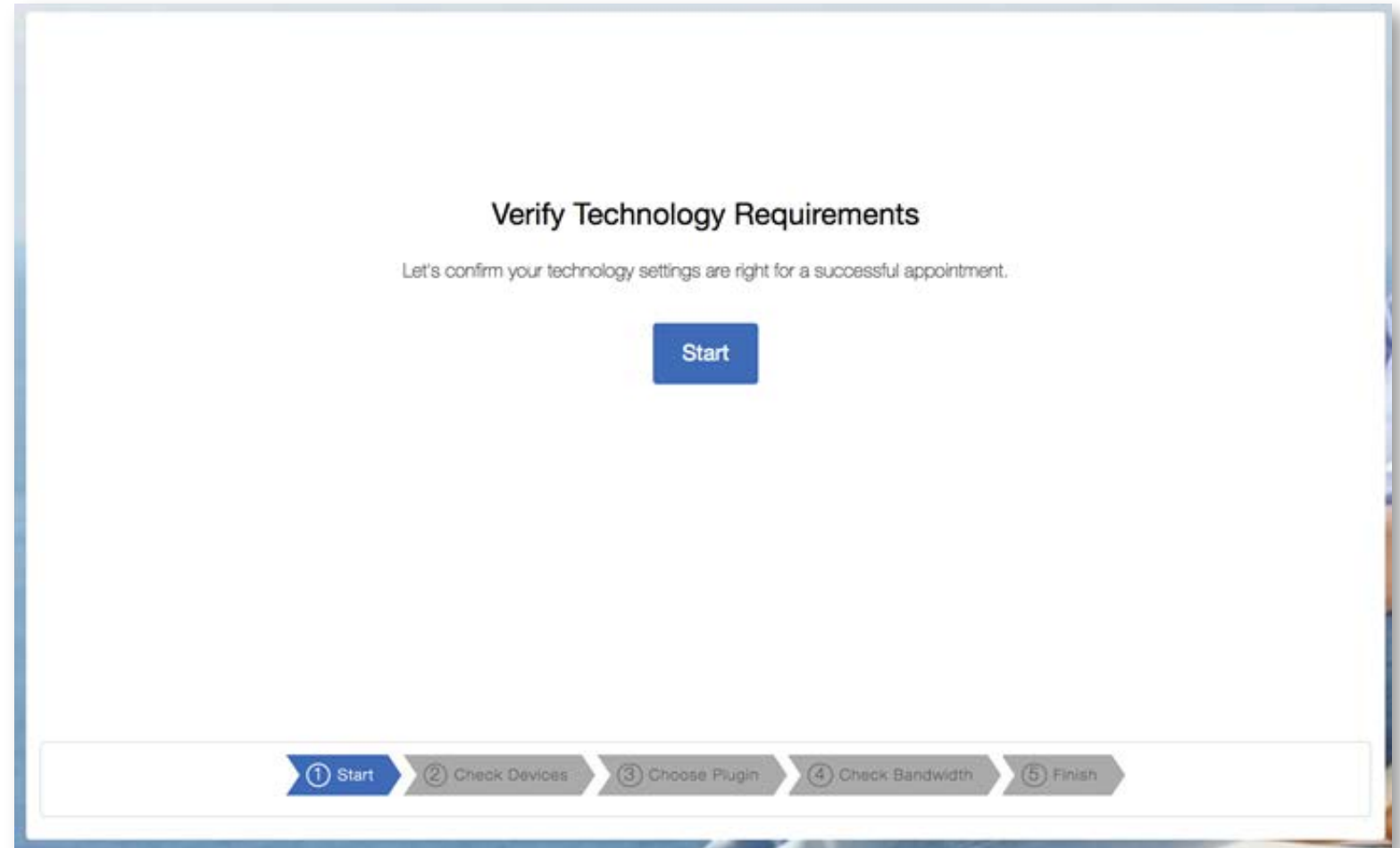
① Create Account ② Basic Info ③ Practice Info ④ Prescribing Info ⑤ Biography ⑥ Availability Settings  
⑦ Appointment Settings ⑧ Billing ⑨ Tech Requirements

## 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

### Adjust Video and Sound Settings

We have automatically detected your computer's web camera, microphone and speakers. You may change the configuration here.

**Web Camera**

Don't see your image to the left? Please change the web camera above or purchase a new one.

**Microphone**

Speak into your mic. Don't see the green bar moving below the video to the left? Please change your mic or purchase a new one.

[Next](#)

① Start → ② Check Devices → ③ Choose Plugin → ④ Check Bandwidth → ⑤ Finish

## Onboarding

In this section, providers can:

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

## Tech Verification

The screenshot shows a 'Choose Plugin' screen with the following elements:

- Title:** Choose Plugin
- Instruction:** Check your default video option Omega below. If it doesn't work, you can try Tango as a backup option.
- Omega Option:** A dark video feed placeholder with a 'Continue with Omega' button below it.
- Tango Option:** A light gray placeholder with the text 'Click here to try Tango' and a 'Use Tango Backup' button below it.
- Progress Bar:** A horizontal bar at the bottom with five steps: 1 Start, 2 Check Devices, 3 Choose Plugin (highlighted), 4 Check Bandwidth, and 5 Finish.

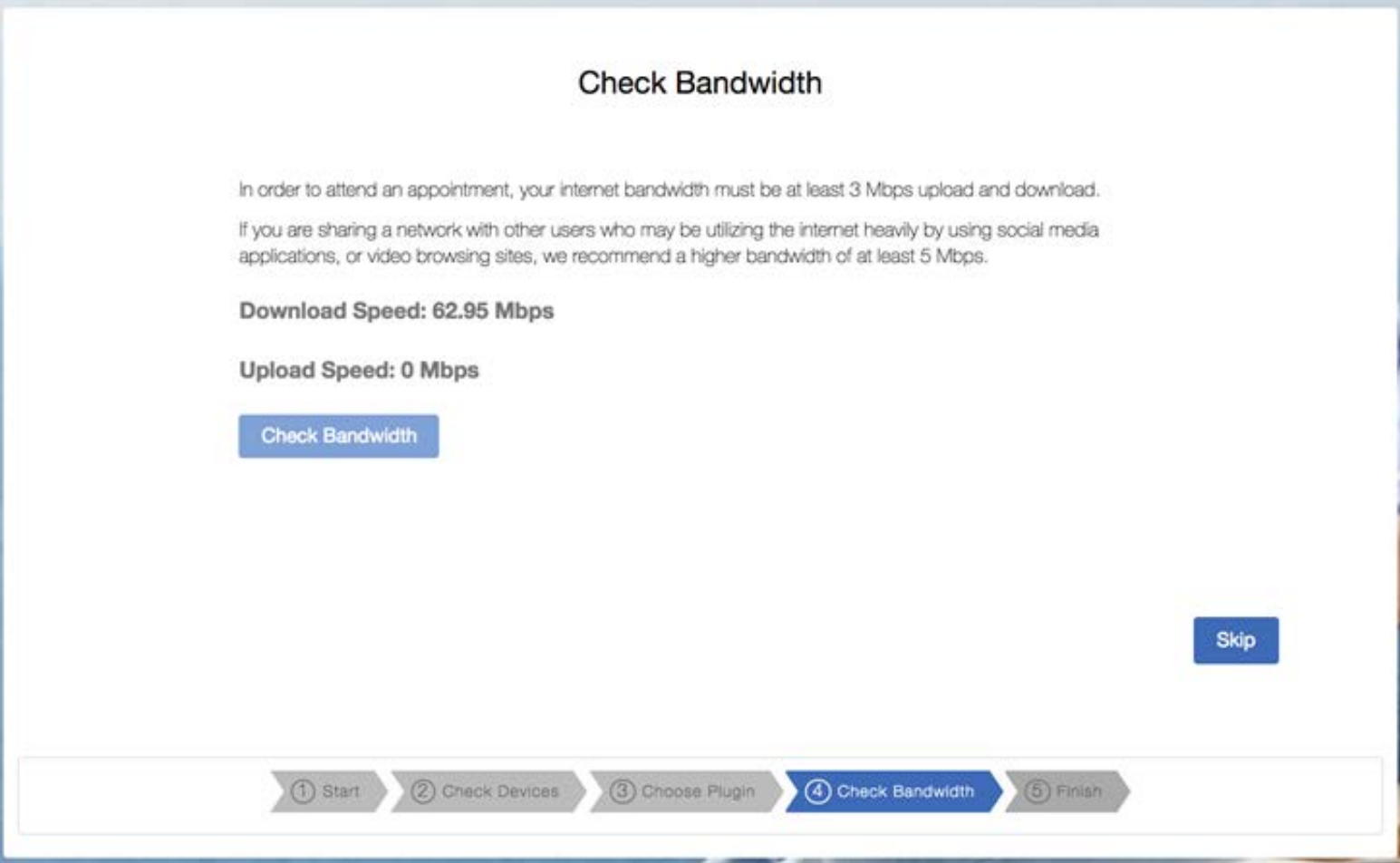


## Onboarding

In this section, providers can:

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

## Tech Verification



The screenshot shows a web interface for a 'Check Bandwidth' step. At the top, the title 'Check Bandwidth' is centered. Below it, there is explanatory text: 'In order to attend an appointment, your internet bandwidth must be at least 3 Mbps upload and download. If you are sharing a network with other users who may be utilizing the internet heavily by using social media applications, or video browsing sites, we recommend a higher bandwidth of at least 5 Mbps.' The current results are displayed as 'Download Speed: 62.95 Mbps' and 'Upload Speed: 0 Mbps'. There are two buttons: a blue 'Check Bandwidth' button and a blue 'Skip' button. At the bottom, a progress bar shows five steps: 1 Start, 2 Check Devices, 3 Choose Plugin, 4 Check Bandwidth (highlighted in blue), and 5 Finish.

### Check Bandwidth

In order to attend an appointment, your internet bandwidth must be at least 3 Mbps upload and download. If you are sharing a network with other users who may be utilizing the internet heavily by using social media applications, or video browsing sites, we recommend a higher bandwidth of at least 5 Mbps.

**Download Speed: 62.95 Mbps**

**Upload Speed: 0 Mbps**

[Check Bandwidth](#)

[Skip](#)

① Start → ② Check Devices → ③ Choose Plugin → ④ Check Bandwidth → ⑤ Finish

## Onboarding

In this section, providers can:

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

## Tech Verification

The screenshot shows a 'Check Bandwidth' screen with the following content:

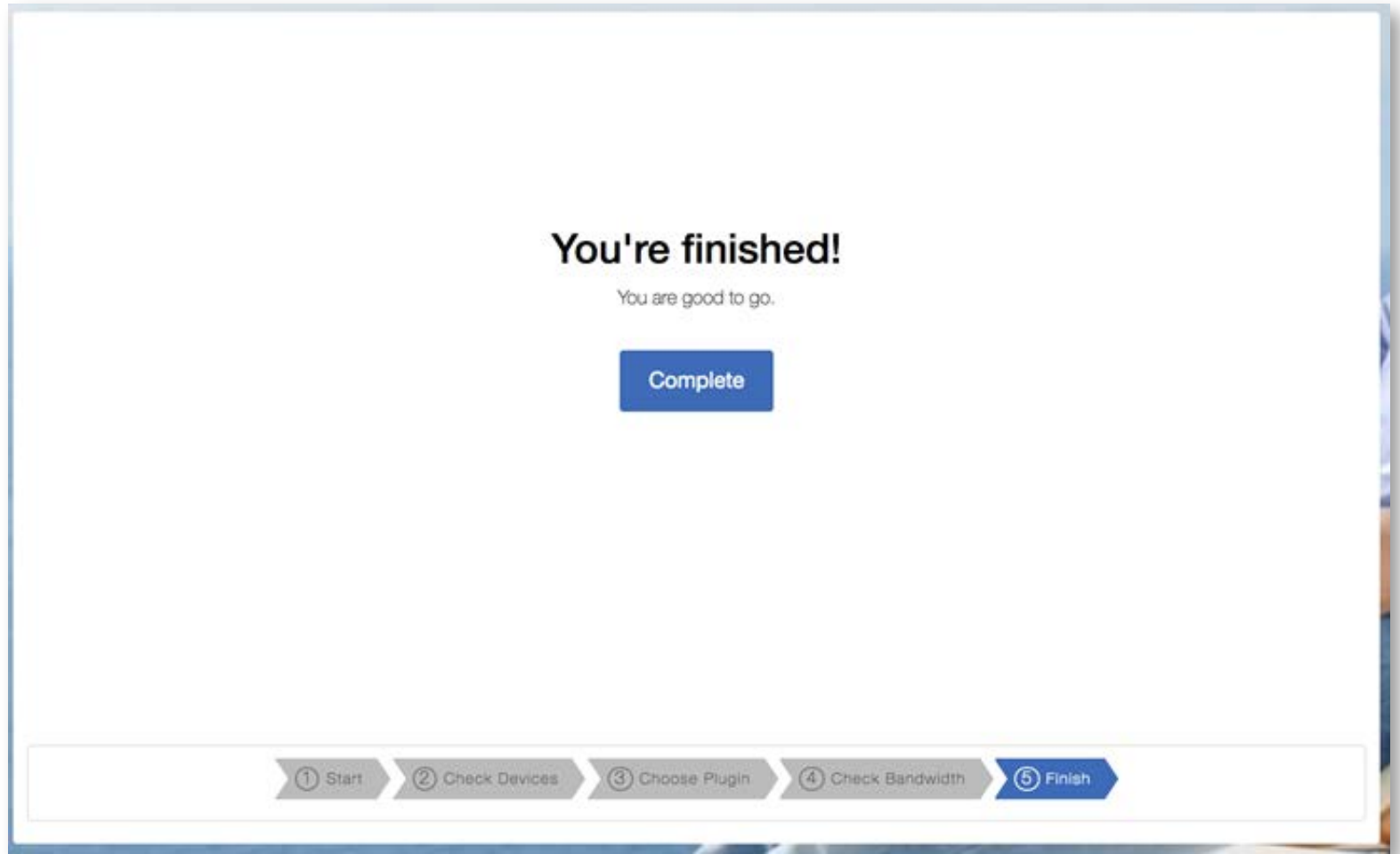
- Check Bandwidth**
- In order to attend an appointment, your internet bandwidth must be at least 3 Mbps upload and download. If you are sharing a network with other users who may be utilizing the internet heavily by using social media applications, or video browsing sites, we recommend a higher bandwidth of at least 5 Mbps.
- Download Speed: 62.95 Mbps**
- Upload Speed: 0 Mbps**
- A blue button labeled **Check Bandwidth**
- A blue button labeled **Skip** in the bottom right corner.
- A progress bar at the bottom with five steps: 1 Start, 2 Check Devices, 3 Choose Plugin, 4 Check Bandwidth (highlighted in blue), and 5 Finish.

## Onboarding

In this section, providers can:

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

## Tech Verification



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## 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

The screenshot displays the 'Optum Middle Provider's Dashboard' with a focus on the 'Appointments' section. The dashboard includes a top navigation bar with the Optum logo, a 'Click Here to Call Us' link, bandwidth information, a notification bell, and 'Settings' and 'Log Out' buttons. The main content area shows a list of appointments for three dates: 2017-12-18, 2017-12-19, and 2017-12-21. Each appointment entry includes a time slot, patient name, and action buttons for 'Edit Note' and 'Report'. For the 2017-12-21 appointments, there are also 'Start', 'Reschedule', and 'Cancel' buttons. A sidebar on the left contains icons for 'Dashboard', 'New Appointment', 'Patient Files', 'Reports', 'Patients', and 'Payments'. A 'QUICK LINKS' section on the right includes a 'Provider Express' link.

Date	Time Slot	Patient Name	Action Buttons
2017-12-18	10:40 AM - 11:30 AM	Patient Name (PNC)	Edit Note, Report
	01:10 PM - 02:00 PM	Patient Name (PNC)	Edit Note, Report
2017-12-19	01:10 PM - 02:00 PM	Patient Name (PNC)	Edit Note, Report
2017-12-21	03:05 AM - 03:37 AM	Patient Name (Optum Organization)	Start, Reschedule, Cancel
	09:00 AM - 09:50 AM	Patient Name (PNC)	Start, Reschedule, Cancel

## 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

The screenshot shows the Optum Appointment Chat Room interface. At the top, the Optum logo is on the left, and a 'Click Here to Call Us' link is in the center. On the right, there is a bandwidth indicator showing 'Your bandwidth is 62.92 download/09.87 upload Mbps' with a green checkmark, a notification bell with '17' alerts, and 'Settings' and 'Log Out' buttons. Below this is a dark header bar with the appointment details: 'Appointment: Thursday, 12/21/2017 09:00 AM - 09:50 AM' and 'Optum Middle Provider' with a user icon. The main content area is divided into three sections. On the left is a dark sidebar with icons for 'Dashboard', 'New Appointment', 'Patient File', 'Reports', 'Patients', and 'Payments'. The central area is a large grey box with a dashed border containing the text: 'You might be a little early, but that's ok. Just hit Start and wait for the other side to do the same.' Below this text is a prominent blue 'Start Appointment' button. On the right side of the main area, there is a patient information section with 'Patient: Patient Name' and 'Provider: Optum Middle Provider'. Below this are buttons for 'VIDEO', 'PATIENT INFO', 'NOTE', 'PAST NOTES', 'FILES', 'PRESCRIPTIONS', and 'TROUBLESHOOTING'. Further down are 'Disconnect', 'Settings', and 'Fullscreen' buttons. Below these are 'Video Options' with 'Omega' and 'Tango' buttons. At the bottom right, there is a 'Adjust Speaker Volume' slider.

## Dashboard

In this section providers can:

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


## Patient Info

Appointment: Thursday, 12/21/2017 09:00 AM - 09:50 AM

Optum Middle Provider

Patient: Patient Name | Provider: Optum Middle Provider

VIDEO | **PATIENT INFO** | NOTE | PAST NOTES | FILES | PRESCRIPTIONS | TROUBLESHOOTING

 **Lord Aragorn**  
Date of Birth: 10/01/1955 | Gender: Male  
Phone: 123-456-7890 | Email: y-aragorn@1dooway.com  
Address: 123 Random Street, City, State, 12345

Reason for Appt: N/A | Email Notifications Enabled: Yes

Organization	Local Police Department	Emergency Contact	Family Physician
DPC	N/A	N/A	N/A






## 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

Appointment: Thursday, 12/21/2017 09:00 AM - 09:50 AM Optum Middle Provider 

Patient: Patient Name  Provider: Optum Middle Provider 

VIDEO PATIENT INFO **NOTE** PAST NOTES FILES PRESCRIPTIONS TROUBLESHOOTING

BILLING, DIAGNOSIS, AND NOTE OPTIONS ▲

Select A Billing Code

Primary Diagnosis Code

Other Diagnosis Codes

Select A Note Template

Last saved at 1:52:41 PM

Note:

Edit - Insert - Format - Table -

**B** / *I* / U [Align Left] [Align Center] [Align Right] [Justify] [List Bulleted] [List Numbered] [Link] [Image] [Undo] [Redo]

POWERED BY TINYMCE

You might be a little early, but that's ok. Just hit Start and wait for the other side to do the same.

[Start Appointment](#)

## Dashboard

In this section, providers can:

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

## Past Notes

Appointment: Thursday, 12/21/2017 09:00 AM - 09:50 AM

Optum Middle Provider

Patient: Patient Name | Provider: Optum Middle Provider

VIDEO | PRESENT INFO | NOTE | **PAST NOTES** | FILES | PRESCRIPTIONS | TROUBLESHOOTING

Past notes for Patient Name

- Optum Middle Provider - (12/21/2017)
- Optum Middle Provider - (12/21/2017)
- Optum Middle Provider - (12/18/2017)

Contents: [Copy Forward](#)

Primary Diagnosis Code:

Other Diagnosis Codes:

Labs:

- Optum Middle Provider - (12/18/2017)
- Optum Middle Provider - (12/16/2017)
- Optum Middle Provider - (12/21/2017)

You might be a little early, but that's ok. Just hit Start and wait for the other side to do the same.

Start Appointment

## 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

The screenshot shows the 'Files' section of a patient appointment interface. At the top, it displays the appointment date and time: 'Appointment: Thursday, 12/21/2017 09:00 AM - 09:50 AM'. The provider is identified as 'Optum Middle Provider'. Below this, there are navigation tabs for 'VIDEO', 'PATIENT INFO', 'NOTE', 'PAST NOTES', 'FILES' (which is highlighted), 'PRESCRIPTIONS', and 'TROUBLESHOOTING'. The main content area is titled 'Patient Files For Patient Name' and contains a table with the following data:

File Name --	Doc Type --	Date Uploaded --
Registration and First Appointment Scheduling Flows - Master - Page 1.png	Intake Form	12/20/2017

Below the table, there is a large dashed box containing the text: 'You might be a little early, but that's ok. Just hit Start and wait for the other side to do the same.' and a blue button labeled 'Start Appointment'.

## Dashboard

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

## Prescriptions

The screenshot shows a web interface for a provider. At the top, it displays the appointment details: "Appointment: Thursday, 12/21/2017 09:00 AM - 09:50 AM" and the provider's name "Optum Middle Provider". Below this, there are two tabs: "Patient: Patient Name" and "Provider: Optum Middle Provider". A navigation bar contains several buttons: "VIDEO", "PATIENT INFO", "NOTE", "PAST NOTES", "FILES", "PRESCRIPTIONS" (which is highlighted in blue), and "TROUBLESHOOTING". Below the navigation bar, it states "There are no currently prescriptions" and provides a "New prescription" button. On the left side of the interface, there is a large grey box with a dashed border containing the text: "You might be a little early, but that's ok. Just hit Start and wait for the other side to do the same." and a "Start Appointment" button.


## 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

**Patient:** Patient Name 

**Provider:** Optum Middle Provider 

VIDEO PATIENT INFO NOTE PAST NOTES FILES PRESCRIPTIONS **TROUBLESHOOTING**

### Problem

### Manual Check

### Run

Poor Video Quality?

- Internet connection is stable
- No other high utilization websites or apps are running

**Bandwidth Test**

No Audio?

- Speakers are turned on or headphones are plugged in
- Microphone is turned on
- Audio is not on mute

**AV Setup**

No Video?

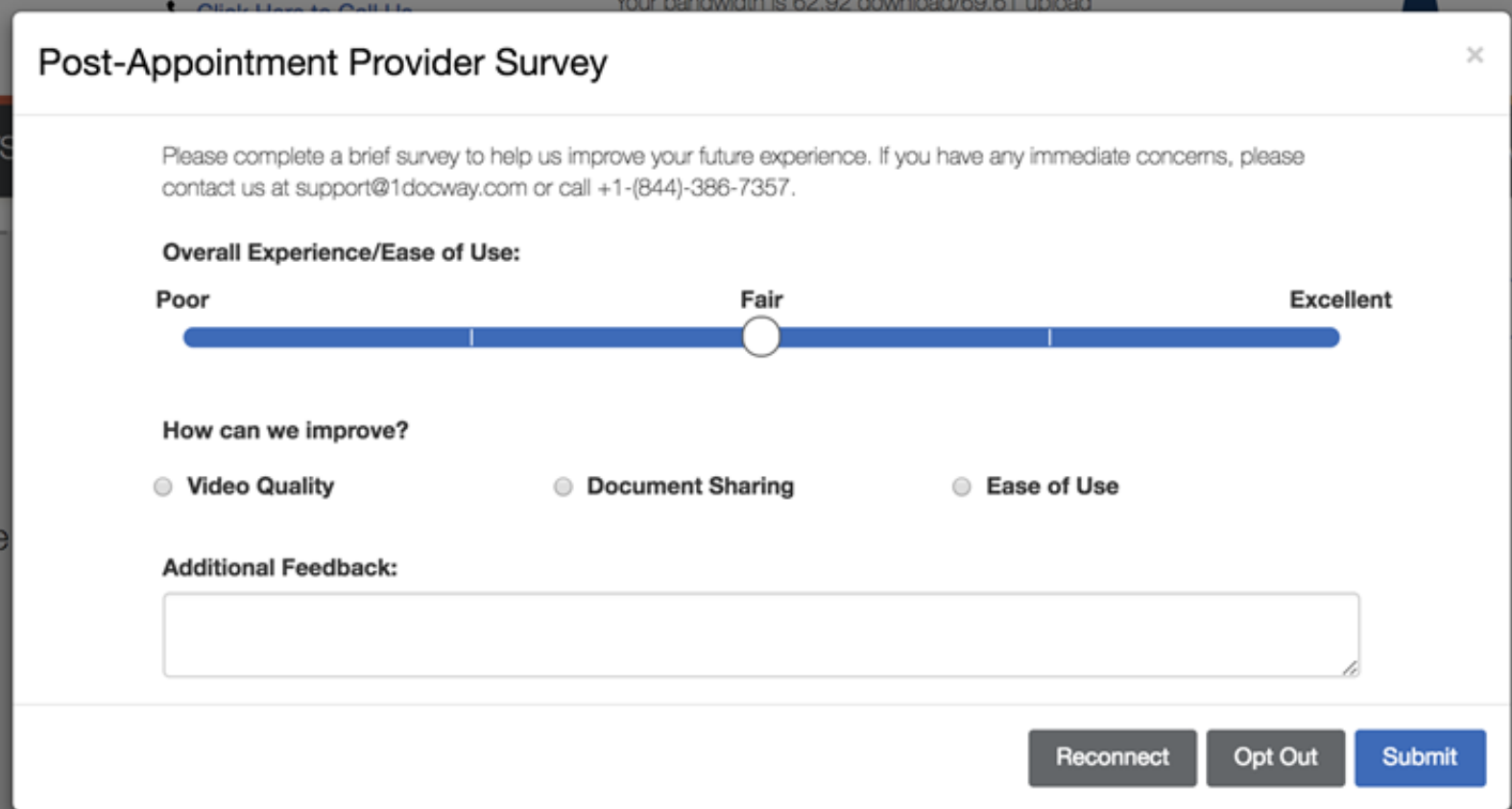
- Omega plug-in is installed
- Webcam is turned on
- No webcam applications are running

## 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



The screenshot shows a web browser window displaying a "Post-Appointment Provider Survey" form. At the top, there is a close button (X) and a title bar. The main heading is "Post-Appointment Provider Survey". Below the heading is a paragraph of text: "Please complete a brief survey to help us improve your future experience. If you have any immediate concerns, please contact us at support@1docway.com or call +1-(844)-386-7357." The first question is "Overall Experience/Ease of Use:" with a horizontal slider ranging from "Poor" to "Excellent". The slider is currently set to "Fair". Below this is the question "How can we improve?" with three radio button options: "Video Quality", "Document Sharing", and "Ease of Use". The "Ease of Use" option is selected. Below the radio buttons is a text input field labeled "Additional Feedback:". At the bottom right of the form are three buttons: "Reconnect", "Opt Out", and "Submit".

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## Agenda



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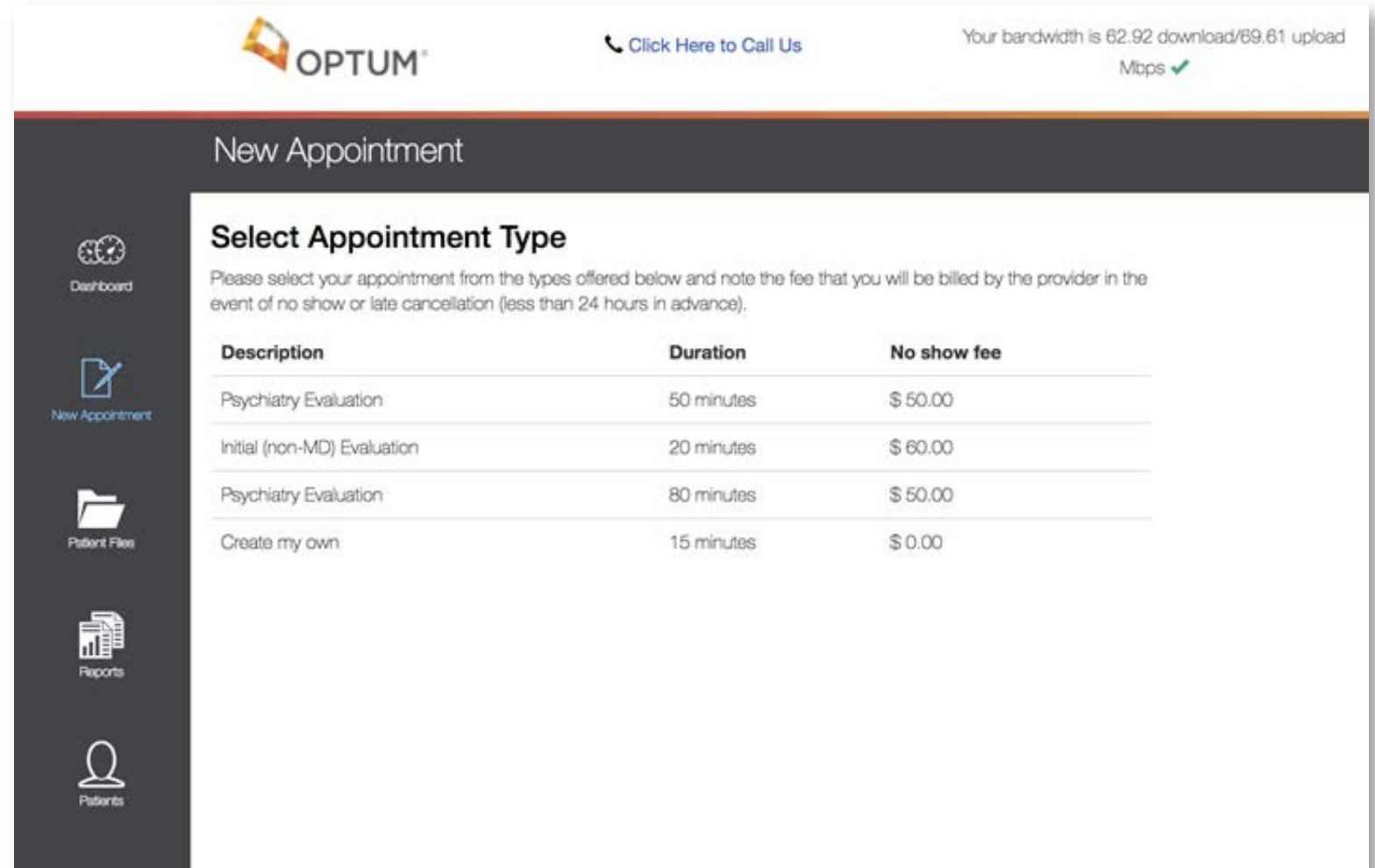


## New Appointment

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



The screenshot shows the OPTUM web interface for scheduling a new appointment. At the top, there is a navigation bar with the OPTUM logo, a "Click Here to Call Us" button, and a bandwidth status indicator showing "Your bandwidth is 62.92 download/69.61 upload Mbps" with a green checkmark. Below the navigation bar is a dark header with the text "New Appointment". On the left side, there is a vertical sidebar with icons and labels for "Dashboard", "New Appointment" (highlighted in blue), "Patient Files", "Reports", and "Patients". The main content area is titled "Select Appointment Type" and includes a paragraph: "Please select your appointment from the types offered below and note the fee that you will be billed by the provider in the event of no show or late cancellation (less than 24 hours in advance)." Below this text is a table with three columns: "Description", "Duration", and "No show fee".

Description	Duration	No show fee
Psychiatry Evaluation	50 minutes	\$ 50.00
Initial (non-MD) Evaluation	20 minutes	\$ 60.00
Psychiatry Evaluation	80 minutes	\$ 50.00
Create my own	15 minutes	\$ 0.00

## New Appointment

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

## Appointment Date and Time

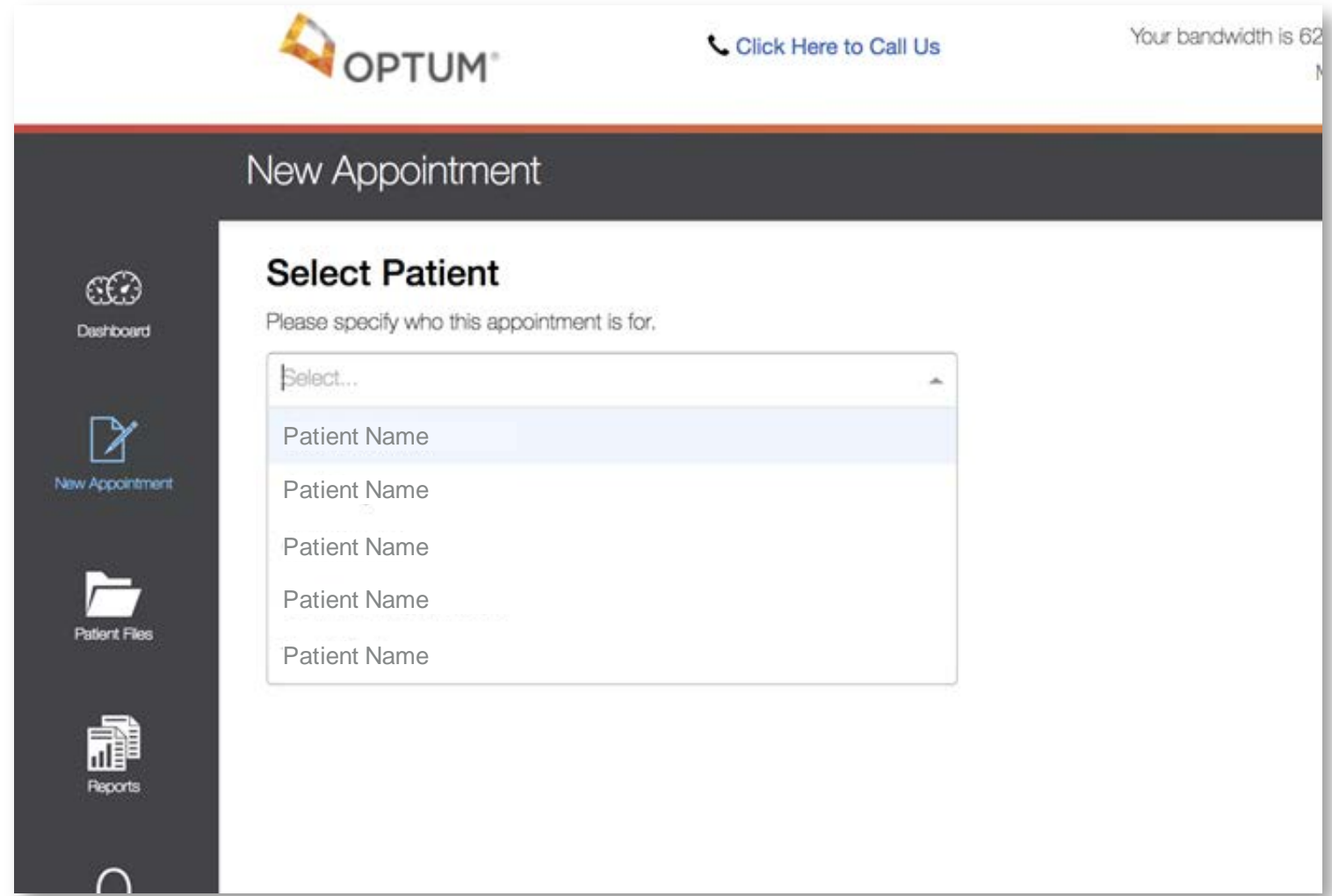
The screenshot displays the 'New Appointment' interface in the Optum system. At the top, the Optum logo is on the left, and navigation links for 'Click Here to Call Us', 'Checking bandwidth in the background...', 'Settings', and 'Log Out' are on the right. The main heading is 'New Appointment' with a user profile icon for 'Optum Middle Provider'. A sidebar on the left contains icons for Dashboard, New Appointment, Patient Flow, Reports, Patients, and Payments. The central area is titled 'Select Appointment Time' and features a calendar for December 2017 with the 20th selected. A time picker shows '12:00 am'. Below the calendar, a grid of time slots is displayed for dates from Wednesday, 12/20 to Thursday, 12/28. The 10:00 am - 10:20 am slot for Thursday, 12/21 is highlighted in blue. A note on the right explains that appointment availabilities are shown in EST -05:00 Eastern Standard Time.

## 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



The screenshot displays the Optum web interface for scheduling a new appointment. At the top, the Optum logo is on the left, a "Click Here to Call Us" link is in the center, and "Your bandwidth is 62" is on the right. Below the header is a dark navigation bar with the text "New Appointment". On the left side of this bar are four icons: a clock for "Dashboard", a pencil for "New Appointment", a folder for "Patient Files", and a document for "Reports". The main content area is titled "Select Patient" and contains the instruction "Please specify who this appointment is for." Below this is a dropdown menu with a "Select..." placeholder and five "Patient Name" entries.

## 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

The screenshot shows a web interface for 'New Appointment' with the following elements:

- Header:** 'New Appointment' on the left and 'Optum Middle Provider' with a logo on the right.
- Title:** 'Confirm Appointment Details' centered at the top.
- Provider Info:** A large icon of a building with an arrow pointing right, followed by the text 'Optum Middle Provider' and a 'View Bio' button.
- Appointment Details:** A list of details on the right side:
  - Day: Thu, 12/21
  - Time: 10:00 am
  - Duration: 20 min
  - Patient: Patient Name
- Additional Information:** A text prompt 'Is there any additional information you'd like to share before the appointment?' followed by a large text input field.
- Action:** A blue 'Book Appointment' button located at the bottom right of the input field.

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## Patient Files

In this section, providers can:

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

## Patient Files

The screenshot displays the Optum Patient Files interface. At the top, there is a navigation bar with the Optum logo, a 'Click Here to Call Us' link, bandwidth information ('Your bandwidth is 179.2 download/255.21 Upload Mbps'), a notification bell, and 'SETTINGS' and 'LOGOUT' buttons. Below this is a 'Documents' header with a 'Provider' profile icon. The main content area is divided into two tabs: 'Patients files' (selected) and 'Common forms'. A search bar is located above a table of documents. The table has columns for Patient Name, Doc Type, File Name, Uploader, and Date Uploaded. To the right of the table is an 'Upload Document' section with dropdown menus for 'Select a patient' and 'Select document type', a file upload area with a 'Choose file' button, and instructions to drag and drop files or use keyboard shortcuts.

Patient Name --	Doc Type --	File Name --	Uploader --	Date Uploaded --	
Patient Name	Not Specified	Screenshot 2016-01-21 17.46.30 (1).png	Demo Provider	12/06/2016	📄 🗑️
Patient Name	Not Specified	W9-athletes.pdf	Test physician	12/05/2016	📄
Patient Name	Not Specified	W9-athletes.pdf	Test physician	12/05/2016	📄
Patient Name	Not Specified	Screen Shot 2016-11-22 at 10.36.11 AM.png	Test Optum Manager	11/29/2016	📄
Patient Name	Lab Test	1.PNG	Test Optum Doctor	11/03/2017	📄
Patient Name	Notes	Train Wreck (2).JPG	Demo Provider	11/02/2017	📄 🗑️
Patient Name	Vitals	1264da4a3f18207...-frangipani-tattoo-plumeria-flowers.jpg	Demo Provider	10/19/2017	📄 🗑️

## 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

OPTUM

Click Here to Call Us

Your bandwidth is 179.2 download/255.21 upload Mbps

SETTINGS LOGOUT

Common Forms

Provider

Patients files Common forms

Search

File Name --	Uploader --	Date Uploaded --		
Specific Form	Demo Provider	11/02/2017	📄	✕
150	Demo Provider	10/19/2017	📄	✕
testphoto	Demo Provider	10/13/2017	📄	✕
exampletest	Demo Provider	10/13/2017	📄	✕
JPG test file	Demo Provider	10/13/2017	📄	✕

10 ▾

1

### Upload a new common form

File Name:

Drag and drop your file(s) here  
or  
Choose file

Use Ctrl(Win) or Command(Mac) to select multiple files

---

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## 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

The screenshot displays the Optum Reports interface. At the top, there is a navigation bar with the Optum logo, a 'Click Here to Call Us' button, bandwidth information, a notification bell, and 'Settings' and 'Log Out' buttons. The main header shows 'Reports' and 'Optum Middle Provider'. A sidebar on the left contains icons for Dashboard, New Appointment, Patient Flow, Records, Patients, and Payments. The main content area features a search bar and a table of appointments. The table has columns for Date, Time, Patient, and Status. One appointment on 12/18/2017 at 11:30 am is highlighted in yellow and marked as 'Canceled'. To the right of the table is a detailed 'Appointment Report' for the selected appointment, including patient and provider information, notes, labs, and prescriptions.

Date	Time	Patient	Status
12/25/2017	03:20 am	Patient Name	Upcoming
12/21/2017	09:00 am	Patient Name	Upcoming
12/21/2017	03:05 am	Patient Name	Upcoming
12/19/2017	01:10 pm	Patient Name	Not Started
12/18/2017	01:10 pm	Patient Name	Not Started
12/18/2017	11:30 am	Patient Name	Canceled
12/18/2017	10:40 am	Patient Name	Not Started
12/16/2017	02:00 pm	Patient Name	Not Started
12/15/2017	05:00 am	Patient Name	Not Started
12/14/2017	04:00 pm	Patient Name	Not Started

**Appointment Report**

**Date:** 12/25/2017  
**Time:** 03:20 am - 04:40 am  
**Note Status:** Not Started

**PATIENT**  
**Patient Name**  
**Date of Birth:** 1972-09-14  
**Phone:** 123-456-7890  
**Address:** 123 Street, City, State 12345  
**Organization:** D2C  
**Gender:** Male  
**Email:** yi-pey@ormanning@1doway.com  
**Time Zone:** Mountain Time (US & Canada)

**PROVIDER**  
**Optum Middle Provider**  
**Reason for Appointment:** N/A  
**Primary Diagnostic Code:** N/A  
**Organization:** Optum Organization  
**Billing Codes:** N/A  
**Other Diagnostic Codes:** N/A

**NOTES**  
**Signed by:**  
[View more notes](#)

**LABS:**  
**PRESCRIPTIONS:**  
There are no prescriptions.

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**Patients**



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# 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

The screenshot displays the 'Manage Patients' interface for an Optum Middle Provider. It is divided into several sections:

- Search and Filter:** Includes a search bar and a refresh icon.
- Patient List:** A table with columns for Name, DOB, and Sex. It lists five patients with their respective details.
- Patient Profile:** A detailed view for a selected patient, including a profile picture, name, date of birth, phone, address, gender, email, and time zone. It also shows emergency contact and family physician information.
- Appointments:** A section with filters for 'All' and 'Custom Date Range', and a search bar. It contains a table of appointments with columns for Date, Time, Provider, and Status, along with action buttons like 'Edit Note', 'Report', 'Start', 'Reschedule', and 'Cancel'.

Name	DOB	Sex
Patient Name	03/18/1968	F
Patient Name <small>New</small>	01/01/1960	M
Patient Name	10/20/1968	M
Patient Name	09/14/1972	M
Patient Name	10/04/1973	F

Date	Time	Provider	Status	Actions
2017-12-14	04:00 PM - 05:00 PM	Optum Middle Provider	Not Started	Edit Note Report
2017-12-19	01:10 PM - 02:00 PM	Optum Middle Provider	Not Started	Edit Note Report
2017-12-25	03:20 AM - 04:40 AM	Optum Middle Provider	Not Started	Start Reschedule Cancel

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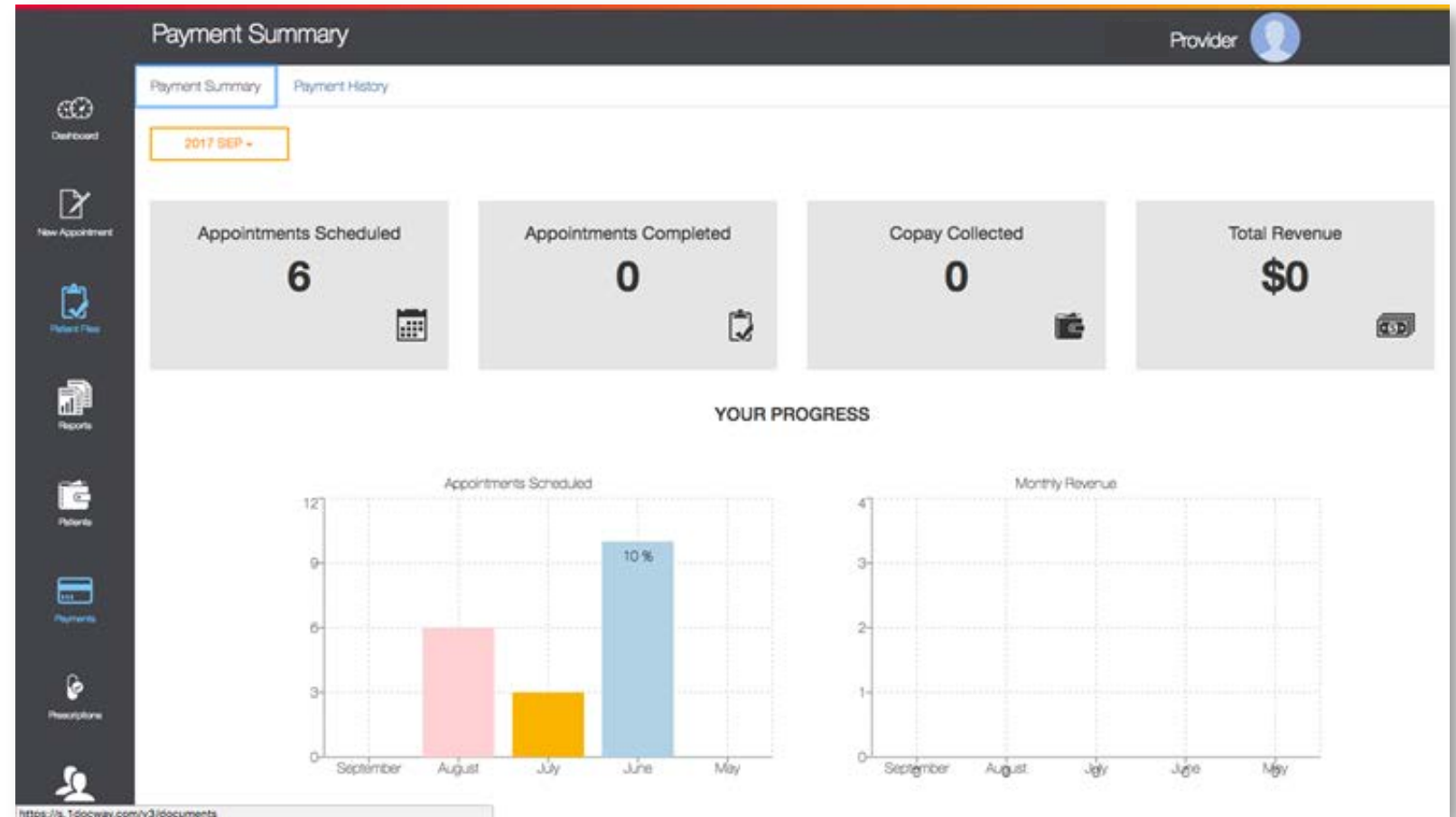
Settings

## 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



## 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

The screenshot displays the 'Payment History' interface. At the top, there are tabs for 'Payment Summary' and 'Payment History'. The 'Payment History' tab is active. On the left, a sidebar contains navigation icons for Dashboard, New Appointment, Patient File, Reports, Patients, Payments, and Prescriptions. The main content area is divided into two sections: 'HISTORY' and 'DETAILED REPORT'.

**HISTORY**

Month	Amount
Sep 2017	0
Aug 2017	0
Jul 2017	0
Jun 2017	0
May 2017	0
Apr 2017	0
Mar 2017	0
Feb 2017	0

**DETAILED REPORT**

Sep 17

Patient	Date	Time	Duration	Copy Col...	Transaction...	Deposit Sta...
Patient A	09-10-17	09:30AM	30 minutes	\$210	\$89	Paio
Patient B	09-10-17	09:30AM	30 minutes	\$210	\$89	Paio
Patient C	09-10-17	09:30AM	30 minutes	\$210	\$89	Paio
Patient D	09-10-17	09:30AM	30 minutes	\$210	\$89	Paio

**Summary:**  
Total Copy Collected **\$200.00**  
Total Transaction Fees **\$20.00**  
Monthly Service Fee **\$21230.00**  
**TOTAL \$21230.00**

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Settings

## Settings

In this section, providers can:

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

## Basic Settings

Settings

Provider

Basic Settings | Practice Information | Prescribing Information | Payment Settings | Biography Settings | Appointment Settings | Notification Settings | Case Note Templates | Availability Settings

### Basic Information

**Date of Birth:** 1 x ▾ Jan x ▾ 1988 x ▾

**Gender:**  Male  Female  Other

**Practice Address:** 12345 City Street ?  
New York NY x ▾ 10013

**Time Zone:** (GMT-05:00) Eastern Time (US & Canada) x ▾

**Phone Number:** 123-456-8888

**Email:** yl+optumtraining@1doo.com

**Username:** Username

**Email Notifications Enabled:**

**Print Past Notes:**

Submit



## Settings

In this section, providers can:

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

## Practice Settings

The screenshot shows a web application interface for 'Settings'. The top navigation bar includes 'Settings' and a 'Provider' profile icon. Below the navigation bar, there are several tabs: 'Basic Settings', 'Practice Information', 'Prescribing Information', 'Payment Settings', 'Biography Settings', 'Appointment Settings', 'Notification Settings', 'Case Note Templates', and 'Availability Settings'. The 'Practice Information' tab is selected and highlighted. The main content area is titled 'Practice Information' and contains the following fields:

- Where are you licensed to practice?**
  - State(s) Licensed:** A dropdown menu showing 'NY' and a text input field containing '139273713'. Below the dropdown is a '+ Add more states' link.
  - NPI:** A text input field containing '1234567890'.
  - TIN/SSN:** A text input field containing '123456789'.
  - Do you have malpractice insurance?** A radio button selection with 'Yes' selected and 'No' as an option.

A blue 'Save Changes' button is located at the bottom right of the form.

## 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

The screenshot shows a web interface for 'Settings' with a navigation bar containing: Basic Settings, Practice Information, Prescribing Information (selected), Payment Settings, Biography Settings, Appointment Settings, Notification Settings, Case Note Templates, and Availability Settings. The main content area is titled 'Prescribing Information' and includes the following elements:

- A question: 'Can you prescribe?' with radio buttons for 'Yes' (selected) and 'No'.
- A 'State(s) Licensed:' section with a dropdown menu showing 'NY' and a text input field containing 'AA1111111'. Below this is a '+ Add more states' link.
- A notice: 'A robust, integrated electronic prescribing service is available to you. Learn more [here](#).'
- A question: 'Would you like to enroll in e-prescriptions?' with radio buttons for 'Yes' and 'No' (selected).
- A disclaimer: 'If "Yes", you will be asked for a valid credit card to pay the first year subscription fee of \$500 (non-refundable). Once you click Submit, your card will be automatically charged and our team will be in touch to get you activated.'
- A blue 'Save Changes' button.

## 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

The screenshot shows the 'Payment Settings' page within a 'Settings' menu. The page has a dark header with the word 'Settings' and a navigation bar with tabs for 'Basic Settings', 'Practice Information', 'Prescribing Information', 'Payment Settings', 'Biography Settings', 'Appointment Settings', and 'Notifications'. The 'Payment Settings' tab is active. The main content area is titled 'Direct Deposit Information' and contains the following fields:

- Routing Number:** 110000000
- Account Number:** \*\*\*\* \* 6789
- Bank Name:** STRIPE TEST BANK
- Zip Code:** N/A

At the bottom of the form is a blue button labeled 'Manage My 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

The screenshot shows the 'Biography Settings' page within a 'Settings' dashboard. The dashboard has a dark header with 'Settings' on the left and 'Provider' with a profile icon on the right. Below the header is a navigation bar with tabs: 'Basic Settings', 'Practice Information', 'Prescribing Information', 'Payment Settings', 'Biography Settings' (which is active), 'Appointment Settings', 'Notification Settings', 'Case Note Templates', and 'Availability'. The main content area is titled 'Biography' and contains three sections: 'Education', 'Picture', and 'Biography'. The 'Education' section has two rows of input fields. The first row contains 'Princeton University' and 'MD'. The second row contains 'United States of America' and 'NJ'. Below these is a '+ Add more degrees' link. The 'Picture' section shows a blue placeholder icon for a profile picture. The 'Biography' section is a large text area containing the text 'My Bio'. At the bottom right of the text area, it says '2994 characters left'. A blue 'Submit' button is located at the bottom right of the form.

## 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

The screenshot shows the 'Appointment Type Settings' page within a 'Settings' application. The page has a dark header with 'Settings' on the left and 'Provider' with a user icon on the right. Below the header is a navigation bar with tabs for 'Basic Settings', 'Practice Information', 'Prescribing Information', 'Payment Settings', 'Biography Settings', 'Appointment Settings' (which is active), 'Notification Settings', 'Case Note Templates', and 'Availability'. The main content area is titled 'Appointments Settings' and contains the following elements:

- A prompt: "Please select from the appointment types menu or create your own by typing into the same field:"
- Three columns of settings:
  - Appointment types you will provide:** A dropdown menu currently showing 'Psychiatry Evaluation' with a close button (x) and a plus icon (+).
  - Duration in minutes of each appointment type:** A text input field containing the number '60' with a clock icon (⌚).
  - No-show fee to display to patients upon booking:** A text input field containing '25.00' with a warning icon (!).
- A link: "+ Add more appointment types"
- A blue 'Submit' button.

## Settings

In this section, providers can:

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

## Notification Settings

	In-App	Email
<b>Appointments</b>		
Rescheduled	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Canceled	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Scheduled	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Notes</b>		
Edit Request Denied	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Request Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Erx</b>		
Prescription	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## 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

The screenshot shows the 'Settings' page for a provider, specifically the 'Case Note Templates' section. The page has a dark header with the title 'Settings' and a 'Provider' profile icon. Below the header is a navigation bar with tabs: 'Basic Settings', 'Practice Information', 'Prescribing Information', 'Payment Settings', 'Biography Settings', 'Appointment Settings', 'Notification Settings', 'Case Note Templates', and 'Availability Settings'. The 'Case Note Templates' tab is active.

The main content area is divided into two columns. The left column contains a 'Create New' button, a search box labeled 'Search Note Templates', and a table of existing templates. The table has two columns: 'Template Name' and 'Last Updated At'. There are three rows of templates, each with a delete icon (X) on the right. Below the table is a dropdown menu showing '10' and a page indicator '1'.

The right column is titled 'Mental Status Examination' and shows 'Last Updated At: 12/20/2017 - 06:13 pm'. It features a rich text editor with a toolbar containing options for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, image, and undo. The editor contains the text 'Mental Status Examination text'. At the bottom right of the editor is a 'save' button and a small 'POWERED BY TINYMCE' logo.

Template Name	Last Updated At
Mental Status Examination	12/20/2017 06:13 pm
Initial Evaluation Template	12/20/2017 06:13 pm
Follow Up Progress Note	12/20/2017 06:13 pm

## 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

The screenshot shows the 'Availability Settings' page within a 'Settings' dashboard. The dashboard has a dark header with 'Settings' on the left and 'Provider' with a profile icon on the right. Below the header is a navigation bar with tabs for 'Basic Settings', 'Practice Information', 'Prescribing Information', 'Payment Settings', 'Biography Settings', 'Appointment Settings', 'Notification Settings', 'Case Note Templates', and 'Availability Settings'. The 'Availability Settings' tab is active. The main content area is titled 'My Availability Schedule' and includes a descriptive paragraph: 'Your weekly availability schedule determines when patients may book appointments with you. You may set multiple availability schedules for different date ranges as well as patient groups. Manage your availability here or create a new schedule.' A blue 'New Availability' button is located in the top right of this section. Below the text is a table with the following columns: 'Name --', 'Start Date -', 'End Date --', and 'Total Hours --'. The table contains one row: 'Default work schedule', '12/20/2017', 'Ongoing', and '10'. To the right of the '10' in the 'Total Hours' column are icons for a plus sign and a minus sign. Below the table is a dropdown menu showing '10 -' and a small dark square with the number '1' in the bottom right corner.

Name --	Start Date -	End Date --	Total Hours --
Default work schedule	12/20/2017	Ongoing	10



## 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

**Availability Schedule**

Name \*  ? Effective Dates \*  to

Description

**Available** Create available times by clicking and dragging blocks under respective days of the week.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
7:00 AM							
8:00 AM							
9:00 AM		8:30 AM – 12:00 PM		8:30 AM – 12:00 PM		8:30 AM – 12:00 PM	
10:00 AM							
11:00 AM							
12:00 PM							
1:00 PM							
2:00 PM							
3:00 PM							
4:00 PM							

Weekly Availability	Total Hours
Monday 08:30 AM - 12:00 PM EST	3:30 ✖
Wednesday 08:30 AM - 12:00 PM EST	3:30 ✖
Friday 08:30 AM - 12:00 PM EST	3:30 ✖
	<b>10:30</b>

Cancel Save

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# Questions?

Thank you.