



ERA Manager Training

December 19, 2013

ERA Manager Overview

- In an effort to reduce the need for Providers, Billing Services and Gateways to call regarding ERA Enrollment questions, as well as provide more autonomy to our ERA Enrollment website users, we have created the ERA Manager.
- The ERA Manager combines ERA Enrollment, first time sign-up and provider maintenance for all types of user.
- In December 2013, Optum has also remediated the ERA Manager application to be in compliance with the Administrative Simplification mandate for ERA Enrollment.
 - Other than field names being modified to match labels defined by the Operating Rules, the ERA Manager functionality remains the same.

Overview of Functionality

- The ERA Manager includes 5 tabs all with different functions:
 - ERA Account Tab – Provides an overview of the Company information which is editable. It also provides a summary of Provider and Payer information.
 - Provider Tab – Allows the User to: Add Providers, Billing NPIs and view the ERA Enrollment status for a Provider/Payer association.
 - Payer Tab – Allows the User to link a Provider's TIN or Billing NPI to a Payer. This tab also allows the User to view the ERA Enrollment status for a Provider/Payer association.
 - File Upload Tab – Allows the User to associate Providers with Payers by uploading a spreadsheet.
 - Support – Tab – Provides FAQs and information to contact Service and Support or the Gateway Center.

To Access the ERA Manager

OPTUM™ EDI Client Center

- Client Center
- Client access login
- Sign up online**
- Customer support
- Download center
- Partner access
- Payer lists

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OPTUM HIPAA Compliant EDI 5010 TRANSACTION TESTING CERTIFIED

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OPTUM™ EDI Client Center

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Sign Up Online


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Log In Screen

- 1 – The Home button will return the User to the Optum EDI Client Center Home page.
- 2 – The User's existing Username and Password can be input here.
- 3 – If the User has not signed up for services, they can select the Sign-Up button to do so.

The screenshot shows the Optum ERA Manager login interface. At the top left is the Optum ERA Manager logo. In the top right corner, there is a 'Home' button with a callout box labeled '1'. The main content area is titled 'Welcome to the Optum ERA Manager'. It is divided into two sections: 'Existing Optum Customers' and 'New Optum Customers'. The 'Existing Optum Customers' section contains a sign-in form titled 'ERA Manager Sign-In' with a callout box labeled '2'. This form includes fields for 'User ID' and 'Password', and a 'Submit' button. The 'New Optum Customers' section contains a 'Sign-Up Now' button with a callout box labeled '3'. At the bottom left, there is a copyright notice: '© Copyright 2013 Optum, Inc.'

Tab Overview

1 – Link to the Customer Center ERA Status page.

2 – Sign Out button takes the User back to the Optum EDI Client Center Home page.

3 – All five tabs are represented.

The screenshot shows the Optum ERA Manager interface. At the top, there is a navigation bar with five tabs: "ERA Account", "Providers", "Payers", "File Upload", and "Support". The "ERA Account" tab is highlighted with an orange box and labeled with the number "3". In the top right corner, there are two buttons: "Customer Center" and "Sign Out", both highlighted with orange boxes and labeled with the numbers "1" and "2" respectively. Below the navigation bar, there is a form for updating company information. The form includes fields for Address, City, State, Zip Code, Phone, Fax, and Email. A "Contact" dropdown menu is also present. A "Save" button is located at the bottom of the form. Below the form, there is a "Summary Information" section with a table showing the number of Providers, Payers, and ERA Enrollments in Progress. The footer of the page contains the copyright notice: "© Copyright 2013 Optum, Inc."

| # of Providers | 2288 |
|----------------------------------|------|
| Add Providers | |
| # of Payers | 136 |
| Add Payers | |
| # of ERA Enrollments in Progress | 2199 |

ERA Account Tab

OPTUM™ ERA Manager Customer Center | Sign Out

ERA Account | Providers | Payers | File Upload | Support

To update your company information, please click on the area below that needs to be changed. Required fields are denoted with an asterisk(*).

Test ERA Account **1** Tax ID:564646546 **2**

Address* 123 Main Street
City* Colorado Springs
State* Colorado Zip Code* 12345 **3**
Phone* 121 -312 -3434 Fax* 855 -495 -8082
Email* MADEUPEMAIL@SAMPLE.COM

Contact* **Abc, aBC** Add Contact **4**

Save **5**

Summary Information 6

| | |
|----------------------------------|------|
| # of Providers | 2288 |
| # of Payers | 136 |
| # of ERA Enrollments in Progress | 2199 |

Add Providers **7**
Add Payers **8**

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ERA Account Tab (continued)

1 – Company Name.

2 – Company Tax Identification Number.

3 – Company Demographic Information. This information is editable. Once edited and saved, it will update the database immediately.

4 – Add Contact button will allow the user to add a contact. A pop-up box will appear when used. (Shown in next slide).

5 – Save button. This button must be used if any information is edited. The ERA Manager will not allow the User to navigate away from the ERA Account tab until the new information is saved.

6 – Summary Information. This area displays how many providers are under the Company and how many Payers are associated with the Providers. Further, it displays how many ERA Enrollments are currently in progress. This means we have not received an approval or rejection or an ERA for a particular Payer/Provider association.

7 – Add Providers hyperlink will navigate to the Provider Tab.

8 – Add Payers hyperlink will navigate to the Payer Tab.

ERA Account Tab (continued)

All fields are required when adding a Contact. Select “Add” when the fields are completed. If a mistake is made or the User changes their mind, they can select “Cancel” and the pop-up box will disappear.

The screenshot displays the OPTUM ERA Manager interface. At the top, there is a navigation bar with the OPTUM logo, 'ERA Manager', and links for 'Customer Center' and 'Sign Out'. Below this is a menu with tabs for 'ERA Account', 'Providers', 'Payers', 'File Upload', and 'Support'. The 'ERA Account' tab is active, showing a form to update company information. The form includes fields for Address*, City*, State* (Colorado), Zip Code* (12345), Phone* (121-312-3434), Fax* (855-495-8082), Email* (PAUL.RONN@OPTUM.COM), and Contact* (Backend, Test). A 'Tax ID: 564646546' is also displayed. A 'Summary Information' table is located at the bottom left of the form area. An 'Add Contact' pop-up window is overlaid on the form, containing fields for First Name*, Last Name*, Phone*, Fax*, and Email*, along with 'Add' and 'Cancel' buttons. A note in the pop-up states: 'Required fields are denoted with an asterisk(*)'.

Customer Center | Sign Out

ERA Account Providers Payers File Upload Support

To update your company information, please click on the area below that needs to be changed. Required fields are denoted with an asterisk(*).

Test ERA Account Tax ID: 564646546

Address* ASGFTYZ
City* ASDF
State* Colorado Zip Code* 12345
Phone* 121 -312 -3434 Fax* 855 -495 -8082
Email* PAUL.RONN@OPTUM.COM
Contact* Backend, Test

Add Contact

Required fields are denoted with an asterisk(*)

First Name*
Last Name*
Phone* Fax*
Email*

Add Cancel

Summary Information

| | |
|----------------------------------|------|
| # of Providers | 2288 |
| # of Payers | 136 |
| # of ERA Enrollments in Progress | 2199 |

Add Payers

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Provider Tab

OPTUM™ ERA Manager Customer Center | Sign Out

ERA Account | **Providers** | Payers | File Upload | Support

To Add Providers: 1
Providers can be added in three different ways: 1) Use the File Upload tab (instructions provided on the tab), 2) Click on "Import List of Providers" link (this will navigate you to the File Upload tab), 3) Click on the Add Provider button.

To View Payers Associated with Your Providers:
Click on the name of a Provider and select the "Show Associated Payers" button. The Payers associated to that Provider will be displayed on the lower half of the screen.

Test ERA Account Tax ID: 564646546

Provider Search 3
Name TIN Billing NPI **Search 4**

2 Current Providers **Refresh 5** **6 Import List of Providers** **Add Provider 7**

Only the first 1,000 entries found are displayed. Please narrow results using Provider Search.

| Name | Address | TIN | Billing NPI | |
|----------------------|------------|-----------|-------------|--|
| 000000000000000000JJ | G | 868686786 | | Add Billing NPI 8 |
| 0000000YUUIIOIUEWRIO | SDJKFHDJKF | 564564564 | 5335603408 | Add Billing NPI |
| 000000SDF | D | 542177691 | 1346474707 | Add Billing NPI |
| 00000EDD | DF | 542177691 | | Add Billing NPI |

9 Show Associated Payers Change Format By Payer Id * 5010 Format Errata Only *

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Provider Tab (continued)

1 – Instructions for the features on the Provider Tab.

2 – Current Providers grid displays the Providers under the Company in alphabetical order. If the Company has more than 1,000 Providers, then the system will display a message stating that there are more than 1,000 Providers and the first 1,000 are displayed. The User should use the Provider Search area to locate the specific Provider they are looking for. The columns of the Current Provider grid are sortable ascending and descending by clicking on the column.

3 – Provider Search allows the User to locate a specific Provider. The User can search by Name, TIN or Billing NPI or a combination of the three.

4 – Search button works along with the three Provider Search input boxes. This button, when clicked triggers the search.

5 – Refresh button will reset the Current Providers grid to its original state.

6 – Import List of Providers hyperlink. This link allows a spreadsheet to be uploaded with Providers and Payer associations. This link will take the User to the File Upload tab.

7 – Add Provider button. This button will allow the User to add a provider via a pop-up box. (See next slide). They are not able to link the new Provider to a Payer with this button. They will need to go to the Payer tab.

8 – Add Billing NPI hyperlink. This link allows the User to add a Billing NPI to the Provider. The Provider can have multiple Billing NPIs. (See Slide 14).

9 – Show Payer Associations button. This button will allow the User to see what Payers are associated with a specific Provider. The User will need to highlight the Provider they are interested in and then click on the Show Payer Associations button. (See Slide 15).

Provider Tab (continued)

All required fields are notated with an asterisk. The Operating Rule mandate required additional fields to be captured on this screen. If a mistake is made or the User changes their mind, they can select “Cancel” and the pop-up box will disappear.

OPTUM ERA Manager Customer Center | Sign Out

ERA Account **Providers** Payers File Upload Support

To Add Providers:
Providers can be added in three different ways: 1) Use the File Upload tab (instructions provided on the tab), 2) Click on "Import List of Providers" link (this will navigate you to the File Upload tab), 3) Click on the Add Provider button.

To View Payers:
Click on the name of the payer in the list. The lower half of the payer's information will be displayed on the right side of the screen.

Test ERA Account

Provider Search:
Name

Current Providers:
Only the first 1,000 providers are displayed.

| Name |
|------------------|
| 0000000000000000 |
| 0000000YUUUOUE |
| 000000SDF |
| 00000EDD |

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Add Provider

Required fields are denoted with an asterisk(*).

Provider Name*

Street*

City*

State*

Zip Code/Postal Code* -

Provider Contact Name*

Telephone Number* - -

Telephone Number Extension

Fax Number - -

Email Address*

Provider Federal Tax Identification Number (TIN)*
or Employer Identification Number (EIN)

National Provider Identifier (NPI)*

Electronic Signature of Person Submitting Enrollment*

Provider Tab (continued)

Both fields are required. Select “Add” when the entry of the fields are completed. If a mistake is made or the User changes their mind, they can select “Cancel” and the pop-up box will disappear.

The screenshot displays the OPTUM ERA Manager interface. At the top, there is a navigation bar with the OPTUM logo, "ERA Manager", and links for "Customer Center" and "Sign Out". Below this is a tabbed interface with "Providers" selected. The main content area contains instructions on how to add providers and view associated payers. A "Provider Search" section includes input fields for Name, TIN, and Billing NPI, along with a "Search" button. A "Current Providers" table is visible, showing a list of providers with their IDs and codes. A modal window titled "Add Billing NPI" is open, prompting the user to enter "Billing NPI" and "Confirm Billing NPI" (both marked with an asterisk as required fields). The modal includes "Add" and "Cancel" buttons. The footer of the interface shows the copyright notice: "© Copyright 2013 Optum, Inc."

OPTUM ERA Manager

Customer Center | Sign Out

ERA Account | **Providers** | Payers | File Upload | Support

To Add Providers:
Providers can be added in three different ways: 1) Use the File Upload tab (instructions provided on the tab), 2) Click on "Import List of Providers" link (this will navigate you to the File Upload tab), 3) Click on the Add Provider button.

To View Payers Associated with Your Providers:
Click on the name of a Provider and select the "Show Associated Payers" button. The Payers associated to that Provider will be displayed on the lower half of the screen.

Test ERA Account Tax ID: 564646546

Provider Search

Name TIN Billing NPI

Current Providers

Only the first 1,000 entries found

| Name | |
|----------------------|---------|
| 0000000000000000JJ | G |
| 0000000YUUIIOIUEWRIO | SDJKFHE |
| 000000SDF | D |
| 00000EDD | DF |

Add Billing NPI

Required fields are denoted with an asterisk(*).

Billing NPI *

Confirm Billing NPI *

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Provider Tab (continued)

1 – Highlight the Provider.

2 – Click on Show Associated Payers.

3 – The Payer grid will display all Payers and their current status that are associated to the Provider's TIN and/or NPI(s).

OPTUM ERA Manager Customer Center Sign Out

ERA Account **Providers** Payers File Upload Support

To Add Providers:
Providers can be added in three different ways: 1) Use the File Upload tab (instructions provided on the tab), 2) Click on "Import List of Providers" link (this will navigate you to the File Upload tab), 3) Click on the Add Provider button.

To View Payers Associated with Your Providers:
Click on the name of a Provider and select the "Show Associated Payers" button. The Payers associated to that Provider will be displayed on the lower half of the screen.

Test ERA Account Tax ID: 564646546

Provider Search
Name TIN Billing NPI

Current Providers [Import List of Providers](#)

Only the first 1,000 entries found are displayed. Please narrow results using Provider Search.

| Name | Address | TIN | Billing NPI |
|-----------|--------------------|-----------|---------------------------------|
| ICE CREAM | 330 KENWOOD CIRCLE | 111111477 | Add Billing NPI |
| ICE CREAM | 340 KENWOOD CIRCLE | 111111478 | Add Billing NPI |
| ICED TEA | 341 KENWOOD CIRCLE | 111111479 | Add Billing NPI |
| ICED TEA | 342 KENWOOD CIRCLE | 111111480 | Add Billing NPI |

* 5010 Format Errata Only *

| ID | ID Type | Payer Name | Payer Id | Received | Status | Date | First ERA | Recent ERA | Format |
|-----------|---------|-----------------|----------|----------|--------|------|-----------|------------|----------------------|
| 111111478 | TIN | 1199 NATIONAL B | 13162 | | | - | | | 5010 |

3

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Payer Tab

OPTUM™ ERA Manager Customer Center | Sign Out

ERA Account Providers **Payers** File Upload Support

To Add a Payer Association to a Provider: 1
Payers can be associated to TIRs and/or Billing NPIs in two ways: 1) Use the File Upload tab (instructions provided on the tab), or 2) Find the payer the provider would like to receive ERAs from on the Payer list below, click on that payer, then click on the Add Associations button.

To View Providers Associated with a Payer:
Find and click on the payer in the list of payers below, then click on the Show Associations button and any associated providers will be displayed in a table at the bottom of the page.

Test ERA Account Tax ID: 564646546

Payer Search 2

State Name Payer Id Search

3 * 5010 Format Errata Only *

| Payer Name ^ | Payer Id | Format ⚡ | Enrollment Agreement |
|----------------------------|----------|----------|--|
| 1199 NATIONAL BENEFIT FUND | 13162 | 4010 | 1199NATIONALBENEFITFUND835.PDF |
| 5010 PAYER | 14163 | 4010 | WELLCAREHMO835ERAENROLLMENT |
| 5010 PAYER | 33333 | 5010 | BLUECHOICEMEDICAID835ENROLLME |
| AARP - UNITEDHEALTHCARE | 36273 | 4010 | |
| Advocate Health Centers | 36320 | 4010 | AdvocateHealthCenters835Enrollment |

Refresh 4

Add Associations 5

Request Payer 6

Show Associations

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Payer Tab (continued)

1 – Instructions for the features on the Payer Tab.

2 – Payer Search allows the User to locate a specific Payer. The User can search by Name, State or Payer ID or a combination of the three.

3 – Payer List. The list is alphabetical by Payer Name. The columns are sortable clicking on the column heading. The columns will sort in ascending or descending order.

4 – Refresh button. The Refresh button, will reset the Payer grid to its original state.

5 – Add Associations button. This button will allow the User to link Provider TIN(s) and/or NPI(s) to a Payer.

6 – Request a Payer hyperlink. This link will allow a User to request Optum to establish an ERA connection with a Payer not on our Payer list for ERAs.

7 – Show Associations button. This button will allow the User to see what Providers are associated with a specific Payer. The User will need to highlight the Payer they are interested in and then click on the Show Associations button.

Payer Tab (continued)

1 – Add Associations pop-up box will appear when the User selects the Add Associations button. They must highlight a Payer first.

2 – ID Picklist displays all the TINs/NPIs that are under the User ID. If there are more than 100, the User is directed to use file upload. The ID Type displays the type of the corresponding ID Number.

3 – Select All Check box can be used if the User wants to associate all the TINs/NPIs under their User ID they can select this box.

4 – Add Button is used to save the information to the database.

5 – Cancel Request Button is available if the User changes their mind. They can click on this button and nothing will be saved to the database.

**Electronic Signature of Person Submitting Enrollment and Preference for Aggregation of Remittance Data have been added as a part of the Administrative Simplification mandate for ERA Enrollment.

The screenshot shows the OPTUM ERA Manager interface. At the top, there are tabs for ERA Account, Providers, Payers, File Upload, and Support. Below the tabs, there are instructions for adding a payer association and viewing providers associated with a payer. The main area shows a search box for Payer Search with fields for State, Name, and Payer Id. A pop-up window titled "Add Associations to 5010 PAYER 1" is displayed. This pop-up contains a message: "This user has more than 100 providers. Please search TIN/NPI to associate using the Search Box provided below." Below this message is an input field for "Input TIN or NPI to be associated" and a "Submit" button. A table with columns "ID", "ID Type", and "Format" is shown, with a row containing "111111477", "TIN", and "5010". Below the table is a "Select All" checkbox. At the bottom of the pop-up, there are two buttons: "Add" and "Cancel Request".

1199 NA
5010 PA
5010 PA
AARP -
Advoca

© Copyright 2013

| ID | ID Type | Format |
|-----------|---------|--------|
| 111111477 | TIN | 5010 |

Payer Tab (continued)

The screenshot displays the OPTUM ERA Manager interface. The 'Payers' tab is active. A pop-up box titled 'Association Results' is open, showing a 'Successful Payer Associations' section for 'TEST (33333)'. The pop-up contains a list of TINs/NPIs and a link to an enrollment form. Numbered callouts (1-6) highlight specific elements: 1. The 'Association Results' title; 2. The 'Printer Friendly Version' link; 3. The 'Close' button; 4. The 'Successful Payer Associations' section header; 5. The enrollment form link 'BLUECHOICEMEDICAID&35ENROLLMENT.PDF'; 6. The vertical scroll bar on the right side of the pop-up content area.

1 – Association Results Pop-Up Box displays after the User clicks the Add button on the Add Associations pop-up box.

2 – Printer Friendly Version of the results is available. By clicking this link, the User can view and print the information displayed.

3 – Close. The User can click this link to close the pop-up box.

4 – Successful Payer Associations. Provides information about TINs/NPIs that were associated with the Payer including each TIN and NPI.

5 – Enrollment Form link. If the Payer requires an Enrollment Form, the link will be provided.

6 – Scroll Bar. If the list of TINs/NPIs is large, the pop-up box will have a scroll bar.

Payer Tab (continued)

1 – Request a Payer pop-up box will appear when the User clicks on the Request a Payer hyperlink.

2 – Required Fields are Payer Name and Payer ID. *Please note the Payer ID will be compared to the current ERA Payer list. If it is found on the list, the User will receive an error message.*

3 – If the User has Payer Contact information, they can input it here.

4 – Request Button. Once clicked, the information will be sent internally and create a maintenance ticket to be worked by Operations.

5 – Cancel button – If the User changes their mind, they can click the Cancel button and the pop-up box will disappear.

Customer Center | Sign Out

OPTUM™ ERA Manager

ERA Account Providers Payers File Upload Support

To Add a Payer Association to a Provider:
Payers can be associated to TINs and/or Billing NPIs in two ways: 1) Use the File Upload tab (instructions provided on the tab), or 2) Find the payer the provider would like to receive ERAs from on the Payer list below, click on that payer, then click on the Add Associations button.

To View Providers Associated with a Payer:
Find and click on the payer in the list of payers below, then click on the Show Associations button and any associated providers will be displayed in a table at the bottom of the page.

Test ERA Account Tax ID: 564646546

Request Payer 1

Required fields are denoted with an asterisk(*).

Payer Name * 2

Payer Id * 2

Payer Contact Information:

Contact Name 3

Contact Phone 3

Contact Email 3

Request 4 Cancel 5

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Payer Tab (continued)

OPTUM™ ERA Manager Customer Center | Sign Out

ERA Account | **Payers** | File Upload | Support

To Add a Payer Association to a Provider:
 Payers can be associated to TINs and/or Billing NPIs in two ways: 1) Use the File Upload tab (instructions provided on the tab), or 2) Find the payer the provider would like to receive ERAs from on the Payer list below, click on that payer, then click on the Add Associations button.

To View Providers Associated with a Payer:
 Find and click on the payer in the list of payers below, then click on the Show Associations button and any associated providers will be displayed in a table at the bottom of the page.

Test ERA Account: 564646546 Tax ID: 564646546

Payer Search

State: [] Name: [] Payer Id: [] Search

* 5010 Format Errata Only *

| Payer Name ^ | Payer Id | Format | Enrollment Agreement |
|------------------------------------|--------------|-------------|---|
| UNITED MEDICAL RESOURCE (UMR) | 31107 | 4010 | |
| UNITEDHEALTHCARE | 87726 | 4010 | 1 |
| UNITEDHEALTHONE (UNITEDHEALTHCARE) | 81400 | 4010 | AMS835ENROLLMENTFORM.PDF |
| UNIVERA HEALTHCARE WNY | 16107 | 4010 | UNIVERAHEALTHCAREWNY835ENRO |
| UNIVERSAL HEALTH | 50528 | 4010 | UNIVERSALHEALTH835.PDF |
| University Family Care | 09830 | 4010 | UniversityFamilyCare835Enrollment.pdf |

Refresh | Add Associations | Request Payer

Show Associations **2**

The associations listed below include all payers with a Payer Id of 87726 **3**

| Provider Name | ID | ID Type | Received | Status | Date | First ERA | Recent ERA | Format |
|-----------------|-----------|---------|------------|-------------|------------|-----------|------------|--------|
| EDI CUSTOMER | 111111368 | TIN | 12/13/2013 | In Progress | 12/13/2013 | | | 5010 |
| EIGHTH NINETH | 111111371 | TIN | 12/13/2013 | In Progress | 12/13/2013 | | | 5010 |
| EMAIL ADDRESS | 111111375 | TIN | 12/13/2013 | In Progress | 12/13/2013 | | | 5010 |
| ENGLAND IRELAND | 111111378 | TIN | 12/13/2013 | In Progress | 12/13/2013 | | | 5010 |

1 – Highlight the Payer that you are interested in.

2 – Click on the Show Associations button.

3 – The grid will appear below showing the Providers who are linked to that Payer.

File Upload Tab

OPTUM™ ERA Manager Customer Center | Sign Out

ERA Account Providers Payers **File Upload** Support

This tab may be used to Add Providers or Add Providers with corresponding Payer Associations by uploading a spreadsheet file.

0. [Click here to download sample sheet and instructions](#) **1**
****Spreadsheets must be uploaded in this format only!**

0. Click the 'Browse' button to select your file.
 0. To transmit your file, click the 'Upload' button.
 (Based on the file size and your transmission speed, it may take a few moments to upload your file.)

Spreadsheet File: **2**

File Upload History **3**

Date Range: **4** thru: Search **5**

| Upload Date | File Name | File Size | Total Lines | Total Accepted | Total Rejected |
|---------------------|--|-----------|-------------|----------------|--------------------|
| 12-13-2013 06:12 AM | SpreadsheetC0350011_v1.xls | 196608 | 46 | 0 | 46 |
| 12-13-2013 06:10 AM | SpreadsheetC0350011_v1.xls | 183808 | 46 | 0 | 46 |
| 12-12-2013 10:00 AM | Upload_Test.xls | 40448 | 5 | 1 | 4 |
| 12-12-2013 09:48 AM | Upload_Test.xls | 40448 | 5 | 0 | 5 |

6 **7** **8** **9** **10** **11**

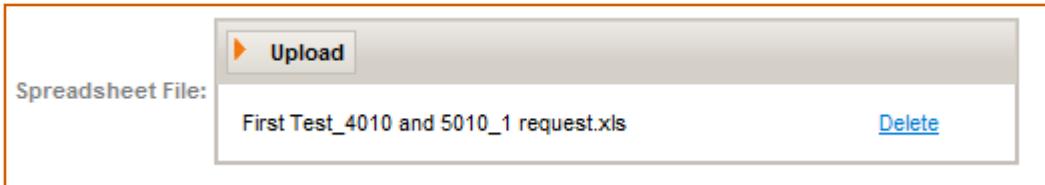
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File Upload Tab (continued)

1 – Instructions. The instructions include the new format of the spreadsheet.

2 – Spreadsheet File; Browse Button. Allows the User to browse their system to select the file they want to upload.

2a – Once the file has been selected, the User will select Upload to submit the file.



3 – File Upload History. Displays the previous files uploaded.

4 – Date Range Selection. The User can input a specific date range to search for files during that time.

5 – Search Button. The User must click the Search button for the system to return the results of the date range selected.

6 – Upload Date Column. Displays the Time and Date the file was uploaded.

7 – File Name Column. Displays the name of the file uploaded as well as a hyperlink to the file.

8 – File Size Column. Displays the size of the file.

9 – Total Rows Column. Displays the number of rows that the file contained.

10 – Total Accepted. Displays the number of rows that were saved to our system. This is also a hyperlink to a spreadsheet that displays the accepted rows.

11 – Total Rejected. Displays the number of rows that were rejected and not saved to our system. This is also a hyperlink to a spreadsheet that displays the rejected rows with the reason the rows were rejected.

Sample Spreadsheet

| Version | Payer ID | Provider Name | | | | | Provider Address | | | | | Provider Identifiers | | Provider Contact Name | | | | Preference for Aggregation of Remittance Data | | Other Identifiers | | Clearinghouse Name | Clearinghouse Contact Name | Email Address | Reason for Submission | Authorized Signature |
|---------|----------|---------------|--------|------|----------------|----------------------|--|------------------------------------|---------|------------------|----------------------------|----------------------|------------|--|------------------------------------|---------------------|--------------------|---|----------------------------|-------------------|---|--|----------------------------|---------------|-----------------------|----------------------|
| Version | Payer ID | Provider Name | Street | City | State/Province | Zip Code/Postal Code | Provider Federal Tax Identification Number (TIN) or Employer Identification Number (EIN) | National Provider Identifier (NPI) | Contact | Telephone Number | Telephone Number Extension | Email Address | Fax Number | Provider Tax Identification Number (TIN) | National Provider Identifier (NPI) | Assigning Authority | Trading Partner ID | Clearinghouse Name | Clearinghouse Contact Name | Email Address | Reason for Submission New Enrollment Change Enrollment Cancel Enrollment | Electronic Signature of Person Submitting Enrollment | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | |

Support Tab

1 – FAQ Listing.

2 – Additional contact information.

3 – Link to the Customer Center (User does not need to log in again).

Support Tab (continued)

OPTUM™ ERA Manager

Customer Center | Sign Out

ERA Account | Providers | Payers | File Upload | **Support**

FAQs

Answers to questions can be revealed by selecting the questions.

- **How do I know what format I should be receiving my ERAs in?**
 - This is based on your billing software. Please check with your billing software vendor to determine if you are 4010 or 5010.
 - Once I determine what format I need, how do I verify that my format is correct?
 - What if the format the payer is sending is different than the format I need my ERAs in?
 - I recently changed the format for all my providers under a specific payer, why did I receive a different format for some providers?
 - I received an approval but, I have not received any ERAs?
- **I have signed up for ERAs, who do I contact to obtain training on utilizing this service?**
 - Upon receipt of your first ERA file you will be contacted by a representative from our Installation/Training Department.
 - What if I no longer wish to receive ERA files through Optum?
 - Where can I obtain assistance with completing an ERA Enrollment Form?
 - How do I know when I am approved with a Payer?
 - How soon will I receive ERAs after enrolling with a Payer?
 - How do I add a Provider?
 - How do I add a Billing NPI?

Still have a question or problem?

Contact our Customer Center Support Team

1-866-367-9778

or

Check the status of an existing ticket or open a service request ticket 24 hours a day, 7 days a week through Customer Center (link located at the top of this page). Click on the Ticket Status button and you will be able to check the status of an existing ticket or create a new one.

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The red twisty can be clicked on to see the answer to the question. If the User selects more than once question, a scroll bar will appear.

New ERA Sign Up

OPTUM™ ERA Manager

1 ERA Sign Up **2** Review Contract

3 Customer Center **2** Sign Out
4

To Sign Up for ERAs, please fill out the information below. You will be given the opportunity to review the contract prior to agreement. Required fields are denoted with an asterisk(*).

5 Vendor Account Tax ID:123456789

Address* 123 MAIN STREET
City* COS
State* Colorado Zip Code* 80902
Phone* Fax* 855-495-8082
Email*
Contact* Add Contact **6**

*Number of Providers to be included in this contract?
*Expected number of ERA transactions per month?
*Which billing method should be used? Flat Monthly Rate per Provider Per Transaction Rate
Which Sales Representative assisted with this purchase?

7 Save & Return Later **8** Review Contract

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New ERA Sign Up (continued)

1 – ERA Sign Up Tab. When a User signs into ERA Manager who has never contracted with us for ERAs they will be directed to this tab.

2 – Review Contract Tab. This tab will allow the User to review their information and review the contract itself prior to agreeing to it.

3 – Customer Center Link. This link will take the User directly to the Customer Center without having to log in again.

4 – Sign Out Link. This link will sign the User out and take them to the Home page.


5 – Company Information. The Company Information is displayed here and is editable.

6 – Add Contact Button. The User can add a Contact to our system by selecting this button.

7 – Save & Return Later Button. The User can save their entered information and sign out all at the same time by using this button.

8 – Review Contract. The User can move to the next tab by selecting this button. If required information is missing or in the wrong format, the system will provide the appropriate error messages and the User will not be able to continue until the information has been provided.

New ERA Sign Up (continued)

Customer Center | Sign Out

ERA Sign Up Review Contract

1 Vendor Account Tax ID:123456789


Address 123 MAIN STREET
City COS
State Colorado Zip Code 80902 -
Phone 719 - 555 - 1212 Fax 855 - 495 - 8082
Email RHONDA.SAPEREIRA@OPTUM.COM
Contact SAP, RHONDA

Billing Method : Flat Monthly Rate Per Provider **2**

Number of Providers : 1

Approximate additional monthly rate for ERA with 1 Provider(s) Transactions will be: \$ 32.00

Once the contact has been viewed a Submit button will appear, allowing the contract to be agreed to and submitted to Optum.
The ERA contracting process will not be complete until this has been done.

3  [Get Adobe Reader](#) **4**

View and Print Contract
I have viewed and printed the contract and

I agree I do not agree **5**
to the terms of the contract

6

New ERA Sign Up (continued)

- 1 – Company Information. The User can review any changes they made to their Company information before it is saved to our database.

- 2 – Billing Method. Displays the method the User chose and how much the contract will cost.


- 3 – Contracting. The User can view and print the contract prior to agreeing/disagreeing to the agreement.

- 4 – Adobe Reader Link. If the User does not have Adobe Reader, they can click on this link and download it for free.

- 5 – Agree/Disagree Buttons. The User can indicate if they agree or disagree to the contract. If they agree, the screen will refresh and they will be allowed to go directly to the Provider or Payer tabs or sign out. All their information will be saved in the database. If they disagree, they will be allowed to go back to the ERA Sign Up tab and change information or Sign Out. Their information will be stored in a staging database only.

- 6 – Submit Button. Once the User selects I agree or I disagree, they must choose the Submit button for the actions above to take place.

New ERA Sign Up (continued)

Customer Center | Sign Out

ERA Sign Up Review Contract

Vendor Account Tax ID:123456789

Address 123 MAIN STREET

City COS

State Colorado Zip Code 80902 -

Phone 719 - 555 - 1212 Fax 855 - 495 - 8082

Email RHONDA.SAPEREIRA@OPTUM.COM


Contact SAP, RHONDA

Billing Method : Flat Monthly Rate Per Provider

Number of Providers : 1

Approximate additional monthly rate for ERA with 1 Provider(s) Transactions will be: \$ 32.00

Once the contact has been viewed a Submit button will appear, allowing the contract to be agreed to and submitted to Optum.
The ERA contracting process will not be complete until this has been done.

Get Adobe Reader

View and Print Contract

I have viewed and printed the contract and

I agree I do not agree 1

to the terms of the contract

2

3 If you would like to modify the information provided to generate your ERA contract, please select the ERA Sign Up tab. If you are not interested in accepting the terms of the ERA Contract at this time and would like to return later, please select the "Sign Out" link at the top of the page.

1 – The User selected I do not agree.

2 – The User selected Submit.

3 – The System provides the User their options.

New ERA Sign Up (continued)

The screenshot shows the OPTUM ERA Manager interface. At the top right, there are links for 'Customer Center' and 'Sign Out'. Below the logo, there are two tabs: 'ERA Sign Up' (active) and 'Review Contract'. The main content area displays 'Vendor Account' information for Tax ID: 123456789, including address (123 MAIN STREET, COS, Colorado), phone (719-555-1212), fax (855-495-8082), and email (RHONDA.SAPEREIRA@OPTUM.COM). It also shows 'Billing Method: Flat Monthly Rate Per Provider', 'Number of Providers: 1', and an 'Approximate additional monthly rate for ERA with 1 Provider(s) Transactions will be: \$ 32.00'. A confirmation message at the bottom states: 'Congratulations! Your ERA Contract has been successfully submitted to Optum. If you would like to add payers or providers, select the Add Payers or Add Providers button below, or you can simply Sign Out using the link provided at the top of the page and return to ERA Manager at a later time.' Below this message are two buttons: 'Add Payers' (labeled with a '2') and 'Add Providers' (labeled with a '3').

1 – After the User agrees and clicks submit, they will get this message.

2 – Allows the User to go to the Payers tab in ERA Manager.

3 – Allows the User to go to the Providers tab in ERA Manager.



Thank you.