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.

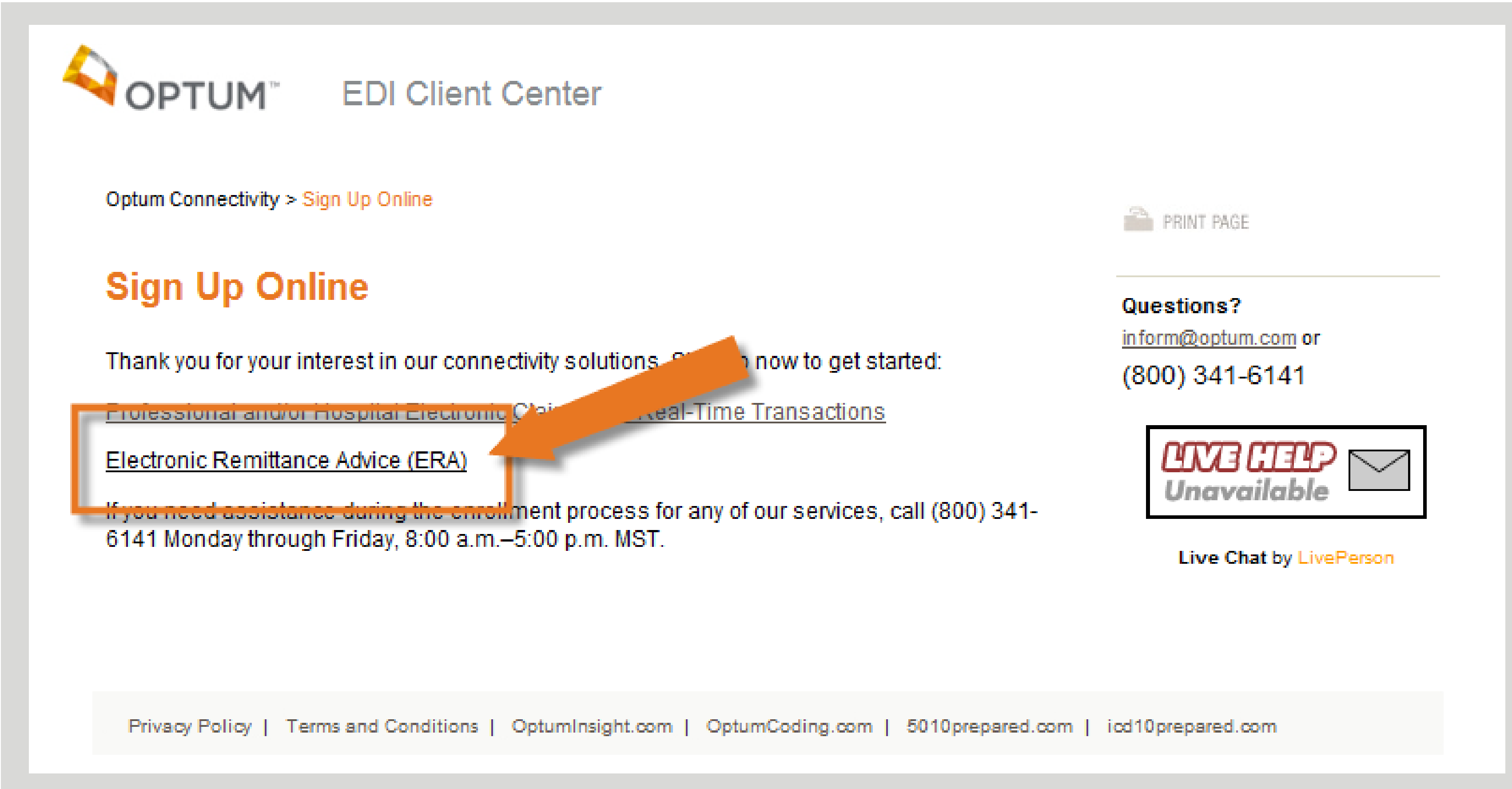
- In December 2013, Optum has also remediated the ERA Manager application to be in compliance with the Administrative Simplification mandate for ERA Enrollment.
  - Other than field names being modified to match labels defined by the Operating Rules, the ERA Manager functionality remains the same.

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

Click on the Electronic Remittance Advice (ERA) Hyperlink

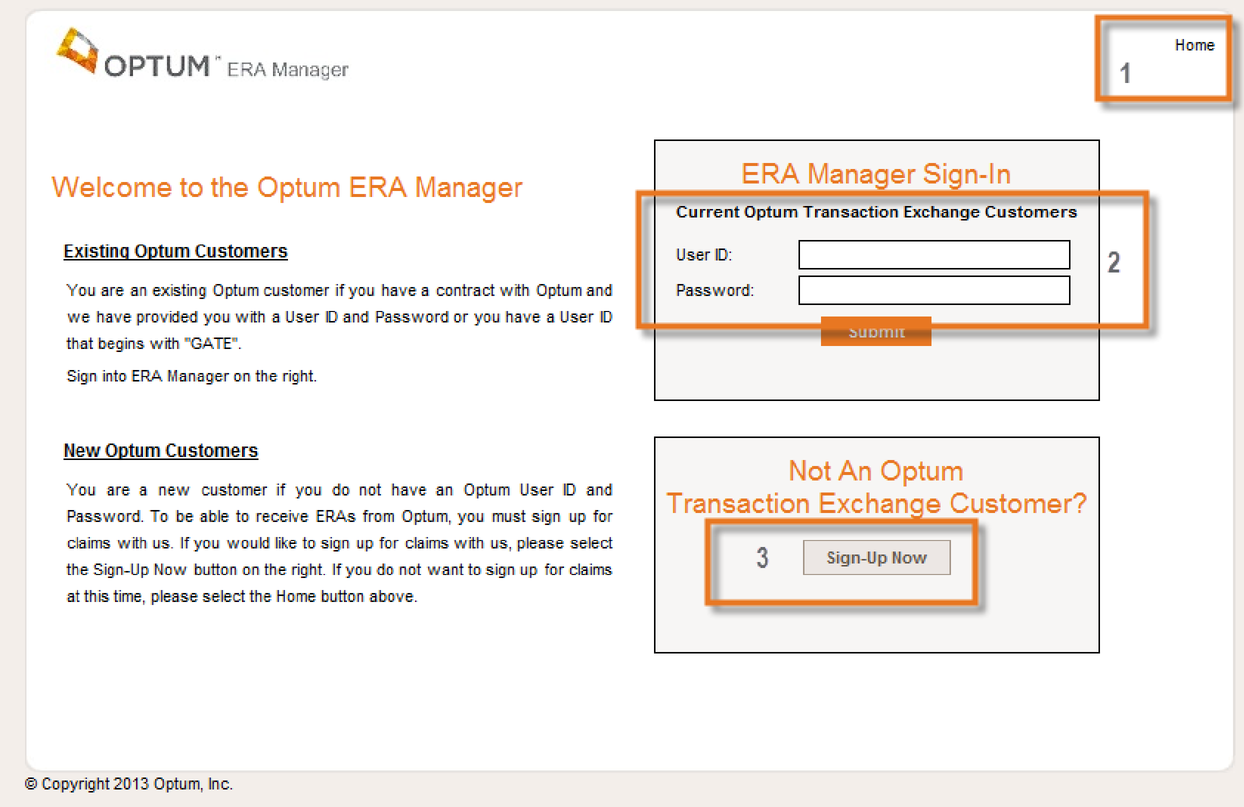


Log In Screen

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.

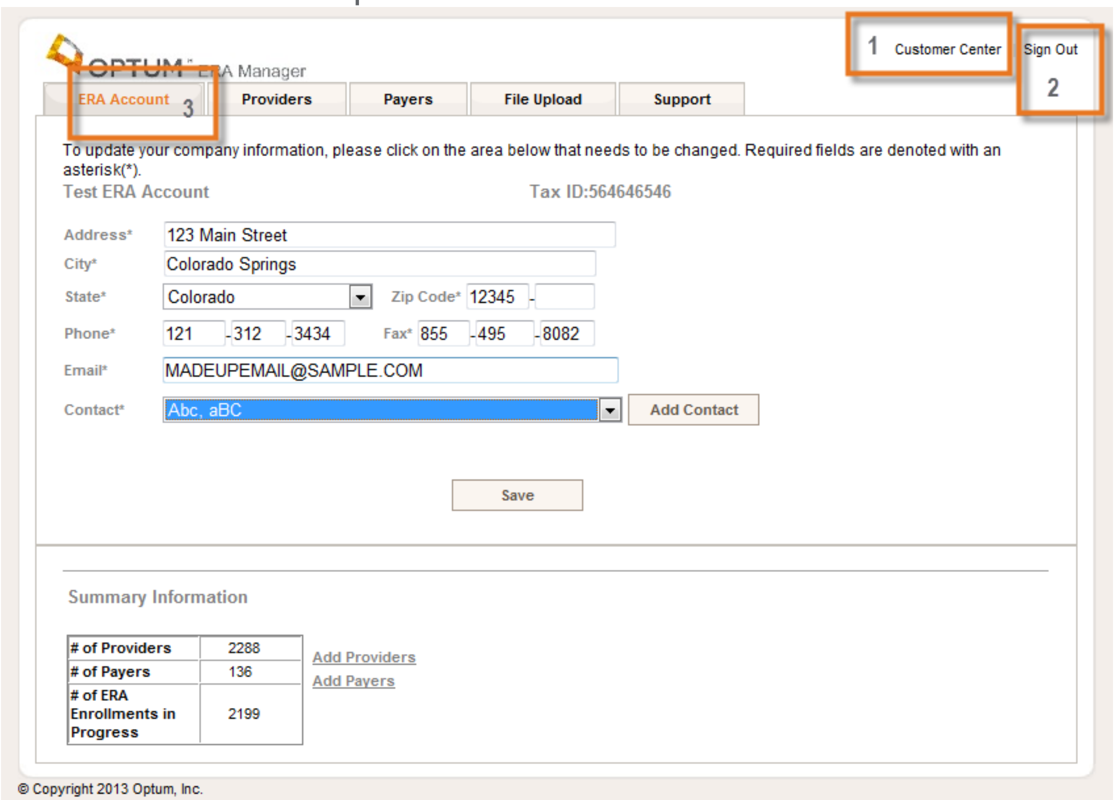


Tab Overview

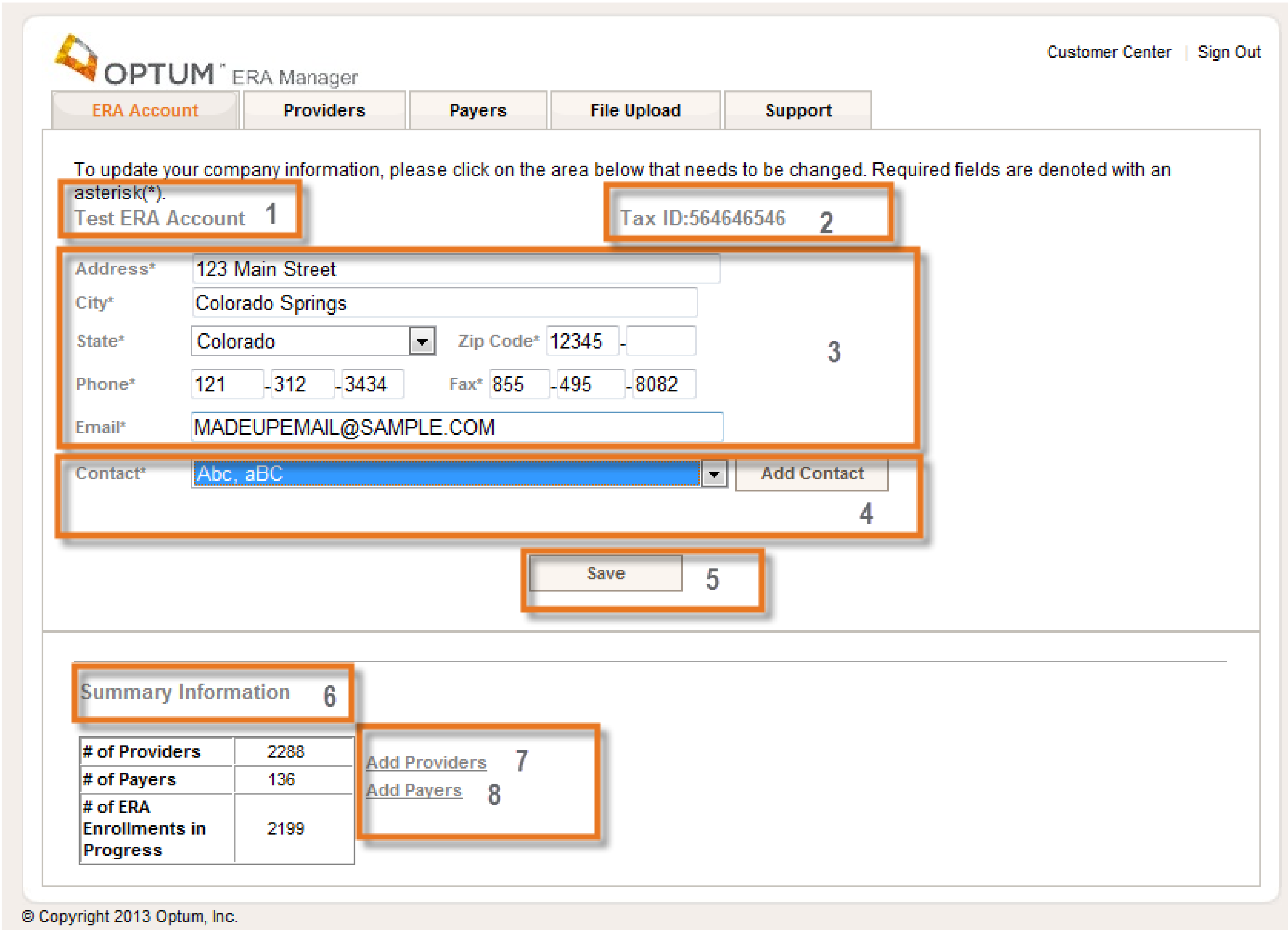
1 – Link to the Customer Center ERA Status page.

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

3 – All five tabs are represented.



ERA Account Tab



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.

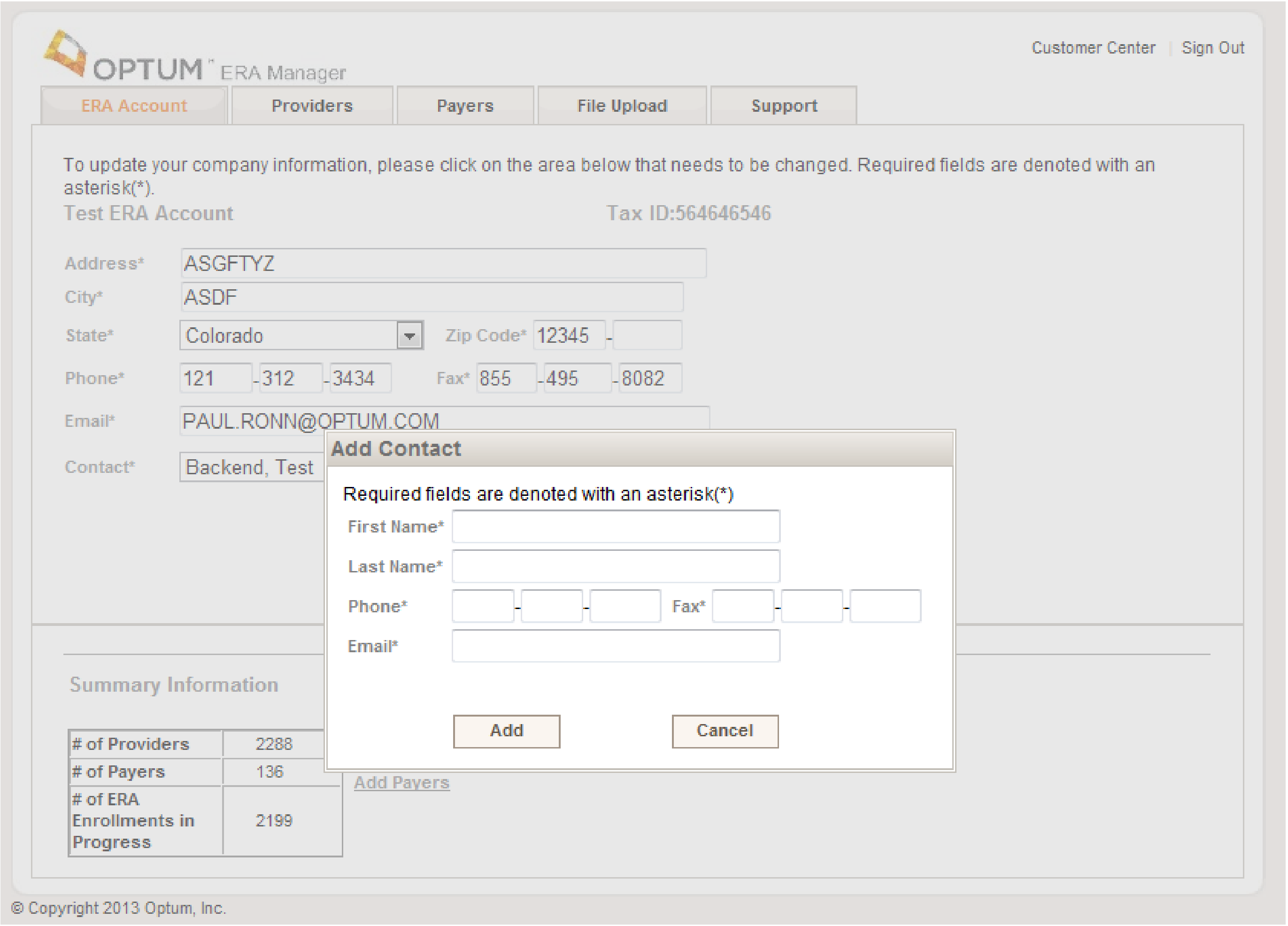
6 – Summary Information. This area displays how many providers are under the Company and how many Payers are associated with the Providers. Further, it displays how many ERA Enrollments are currently in progress. This means we have not received an approval or rejection or an ERA for a particular Payer/Provider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

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

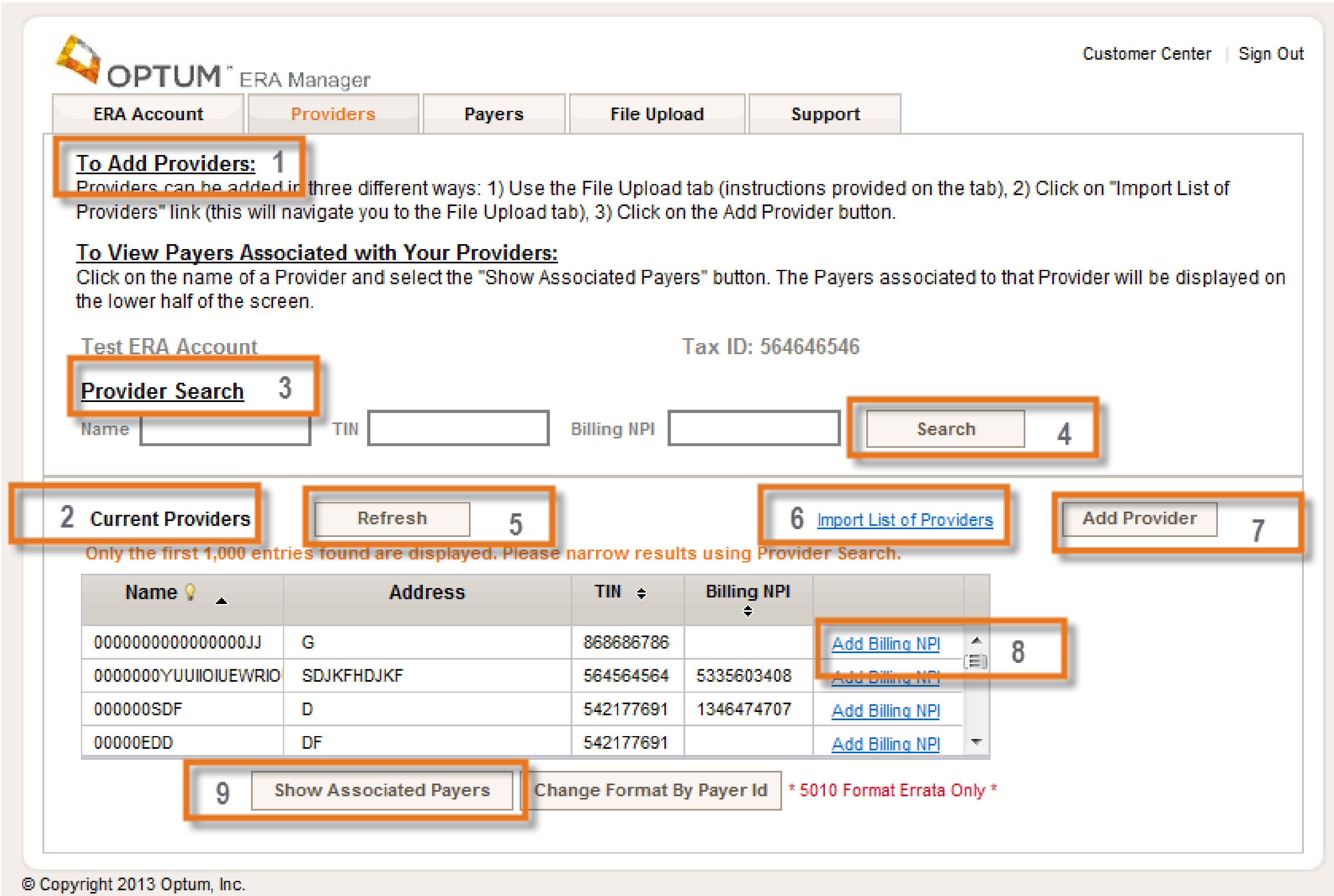
8 – Add Payers hyperlink will navigate to the Payer Tab.

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.



Provider Tab



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.

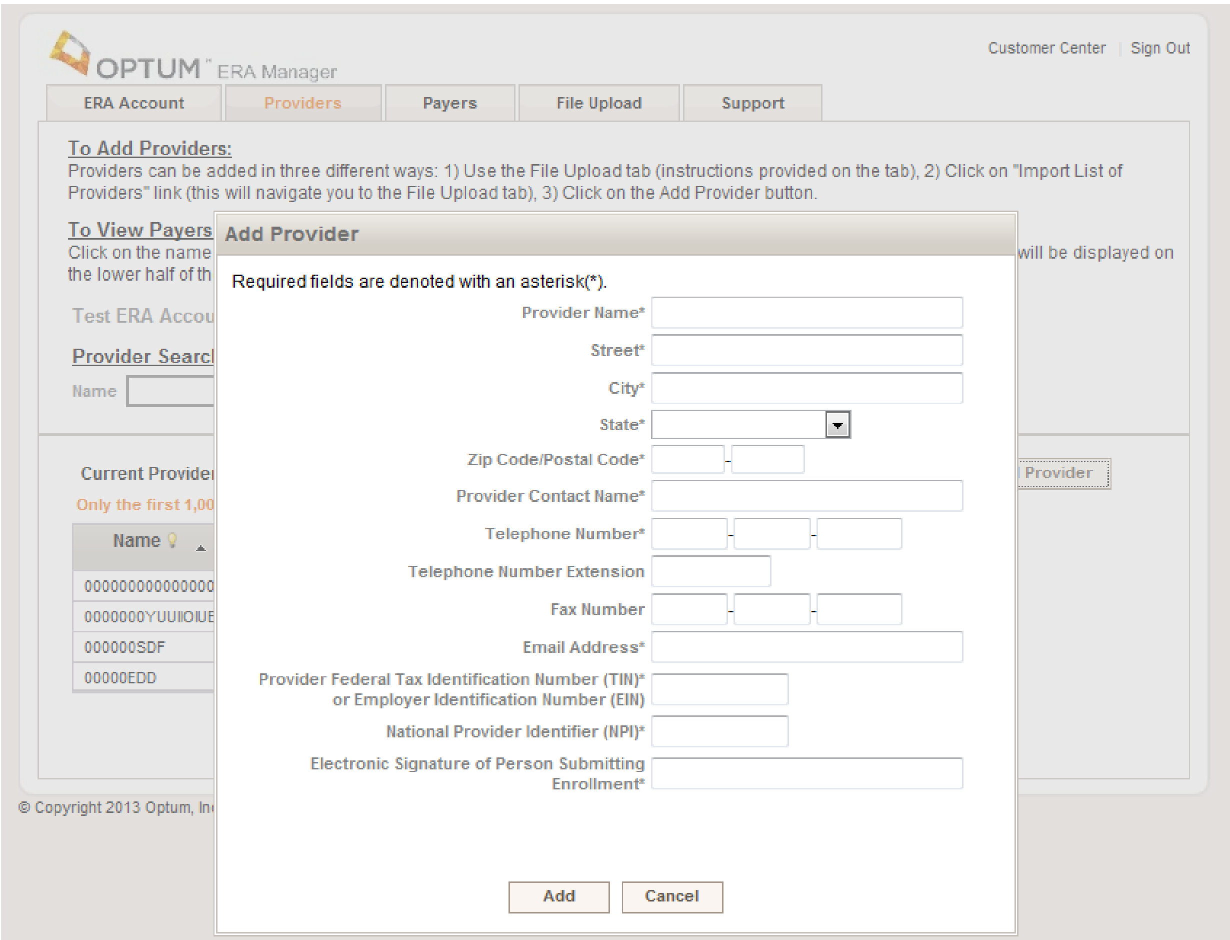
7 – Add Provider button. This button will allow the User to add a provider via a pop-up box. (See next slide). They are not able to link the new Provider to a Payer with this button. They will need to go to the Payer tab.

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).

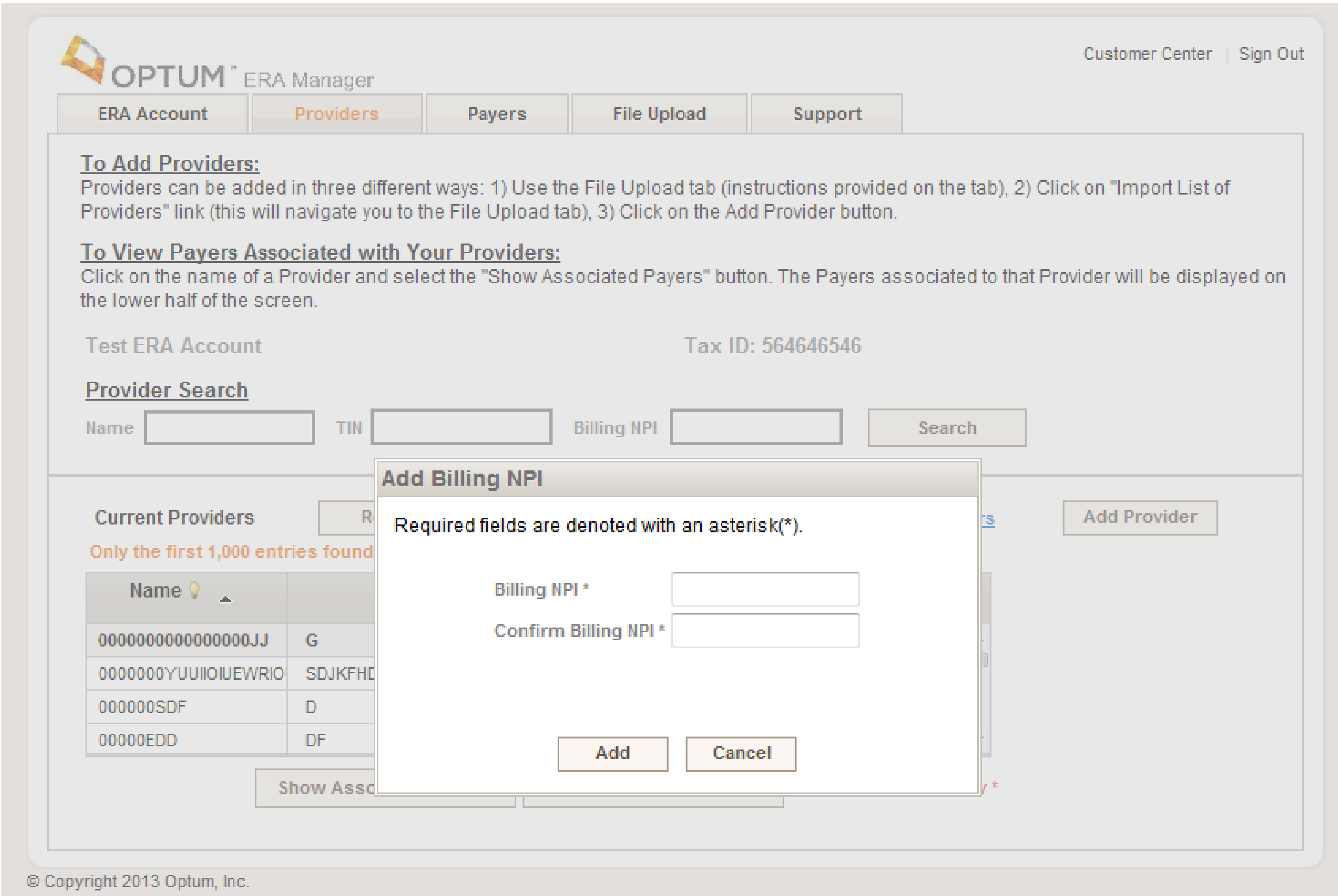
Provider Tab (continued)

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.



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.

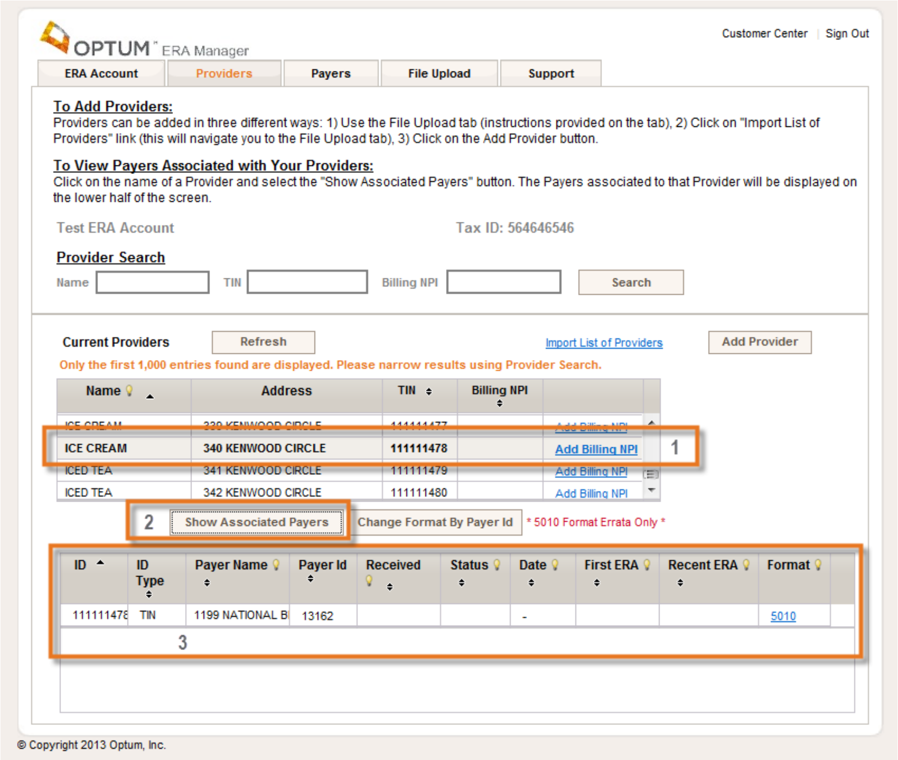


Provider Tab (continued)

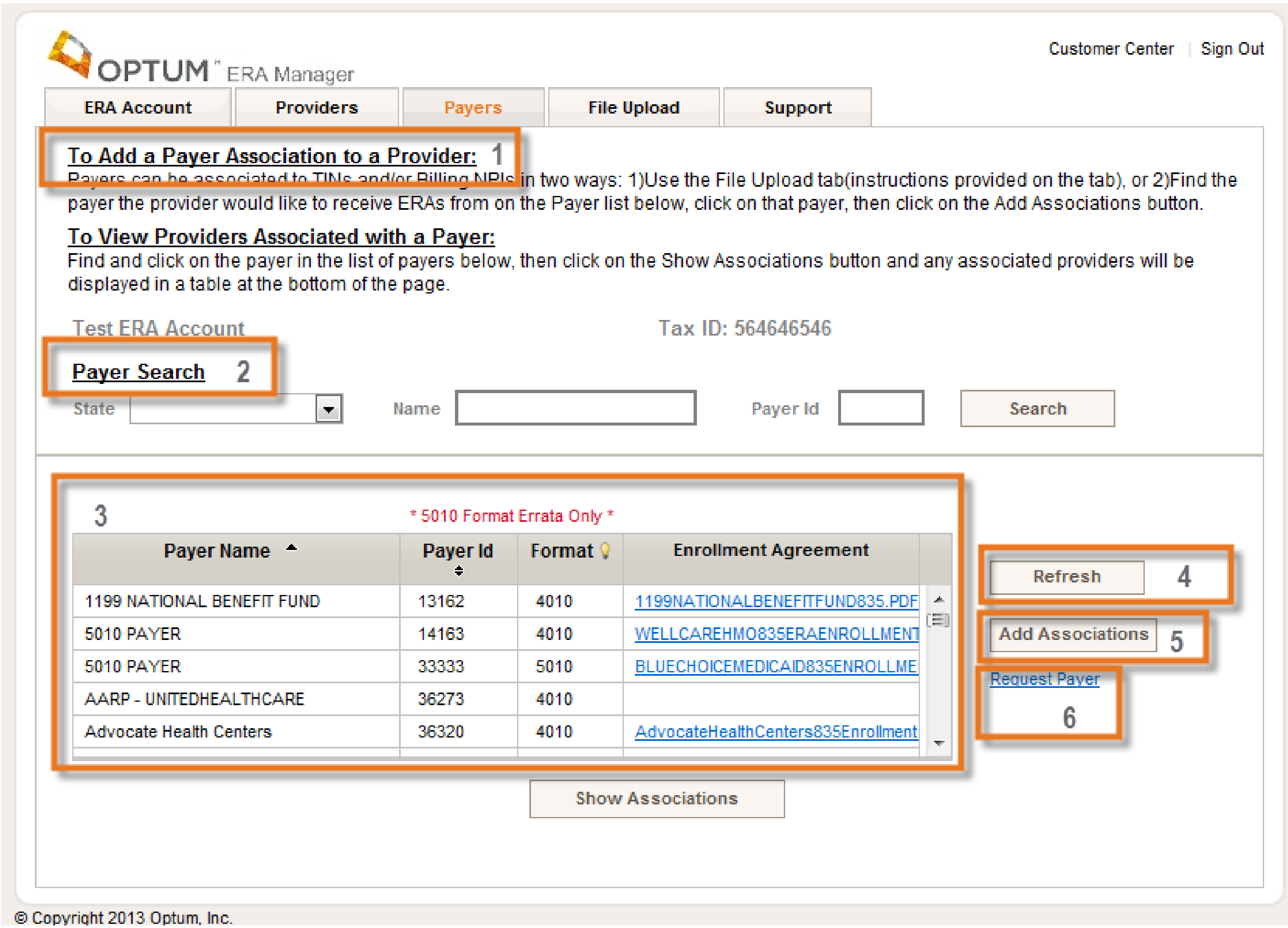
1 – Highlight the Provider.

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).



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 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
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.

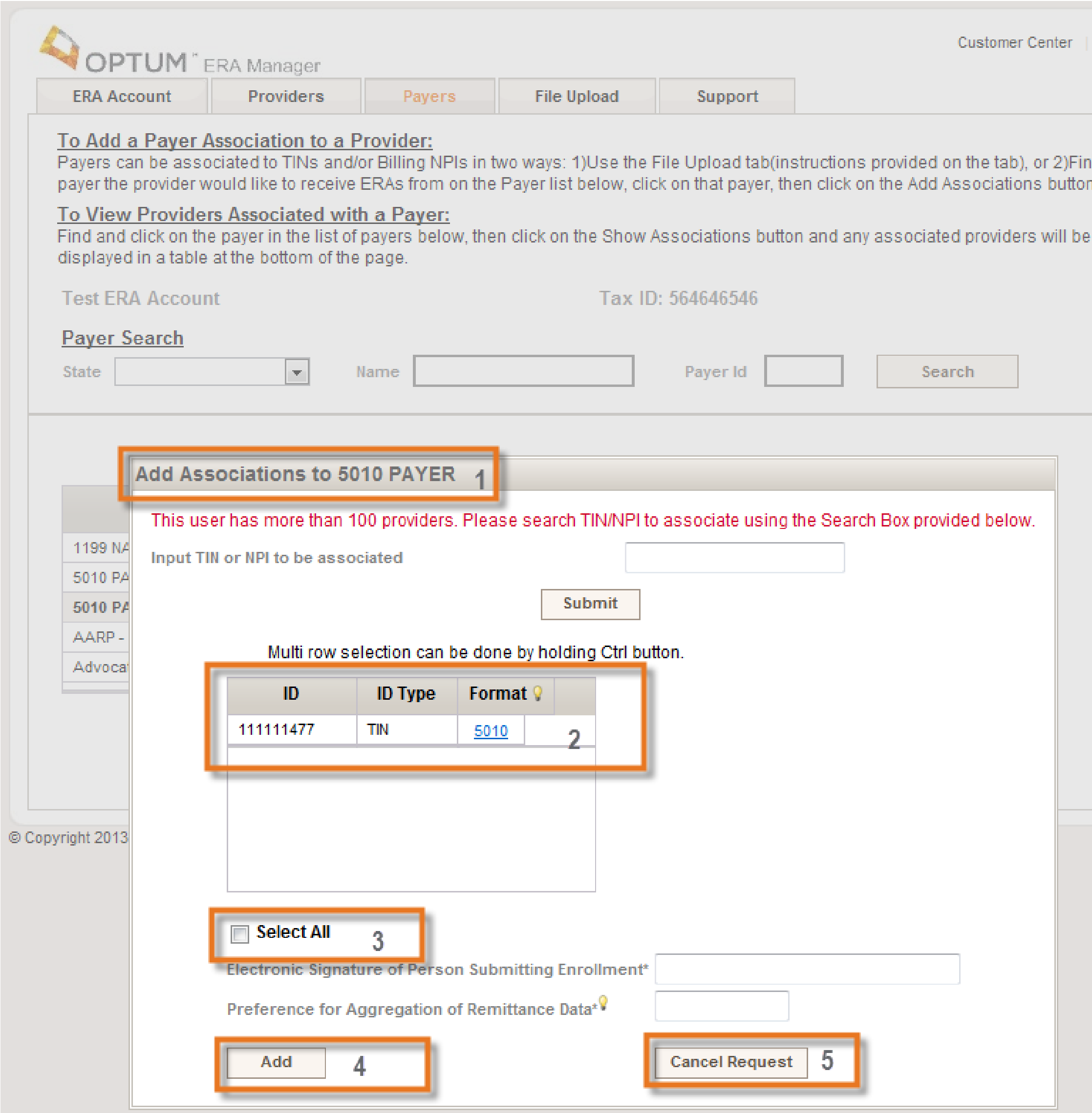
2 – ID Picklist displays all the TINs/NPIs that are under the User ID. If there are more than 100, the User is directed to use file upload. The ID Type displays the type of the corresponding ID Number.

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.

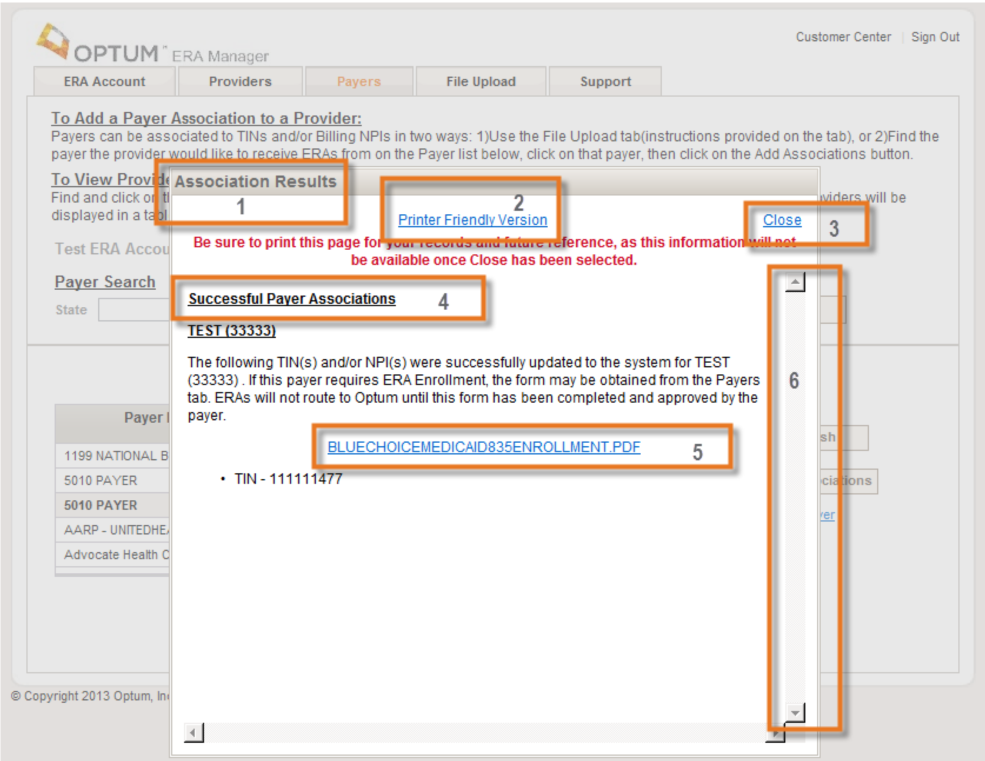
4 – Add Button is used to save the information to the database.

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.



Payer Tab (continued)



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)

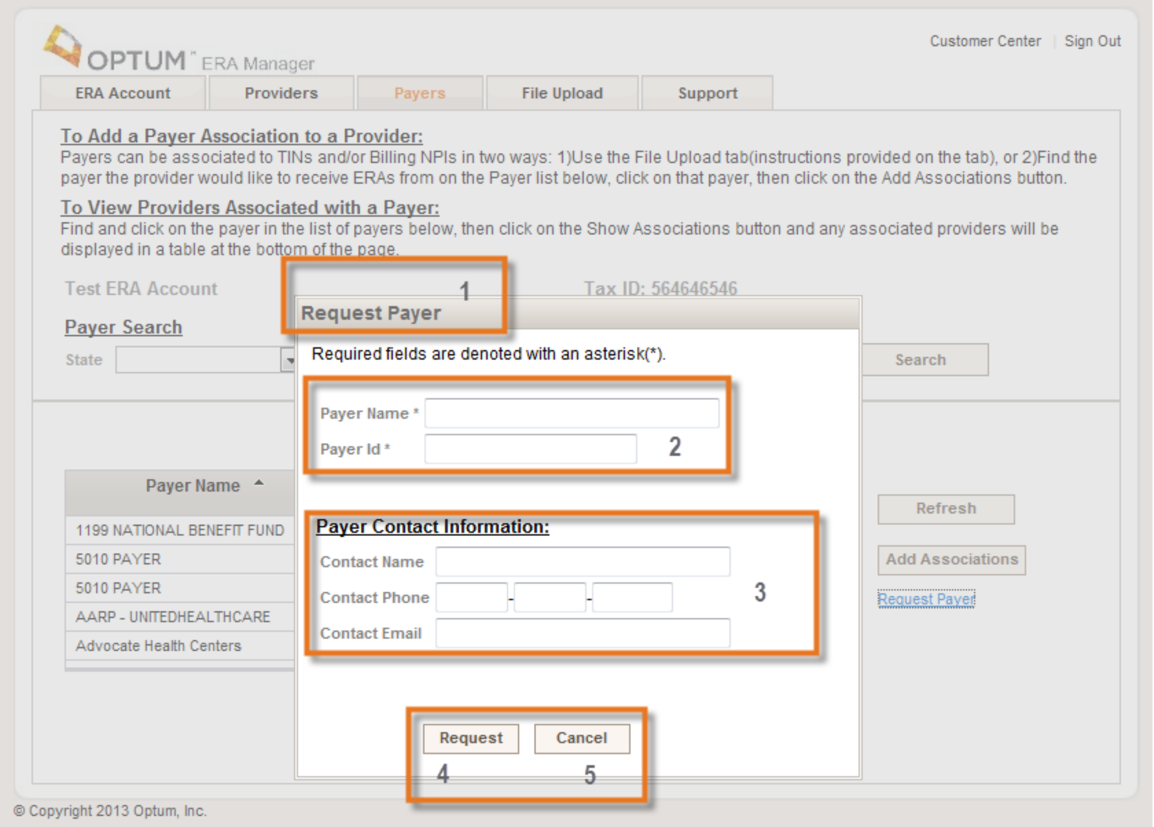
1 – Request a Payer pop-up box will appear when the User clicks on the Request a Payer hyperlink.

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.*

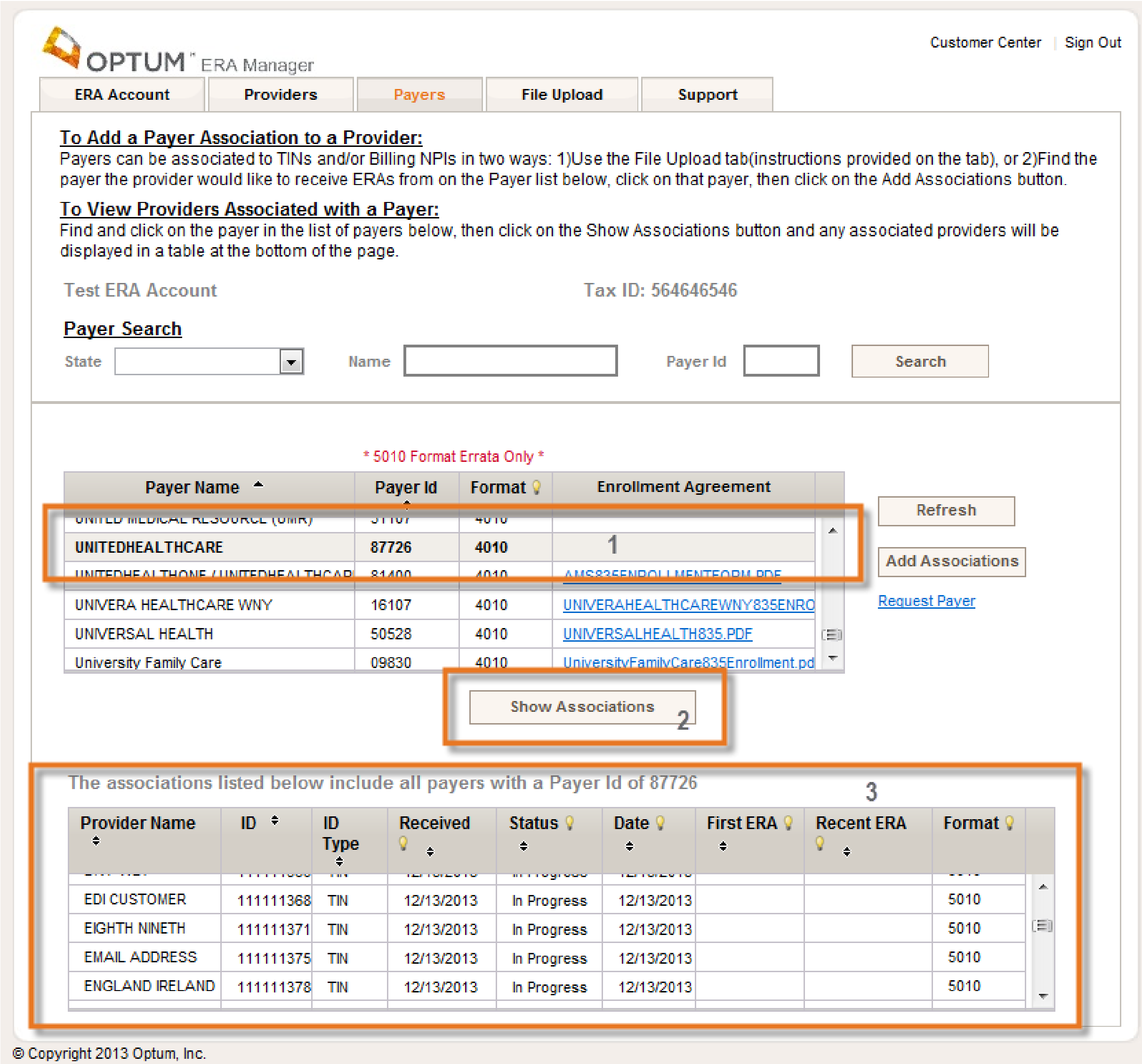
3 – If the User has Payer Contact information, they can input it here.

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.



Payer Tab (continued)

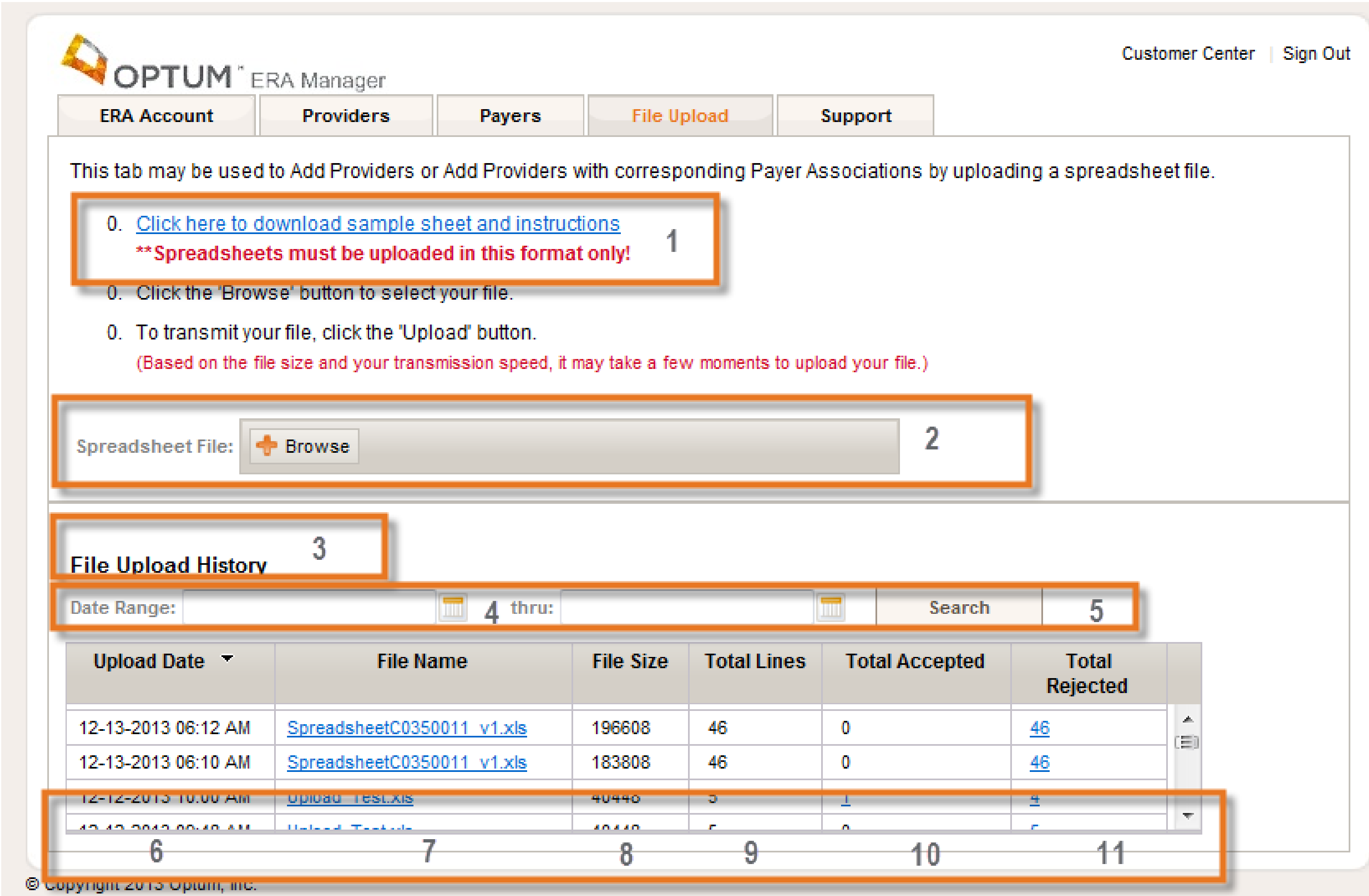


1 – Highlight the Payer that you are interested in.

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

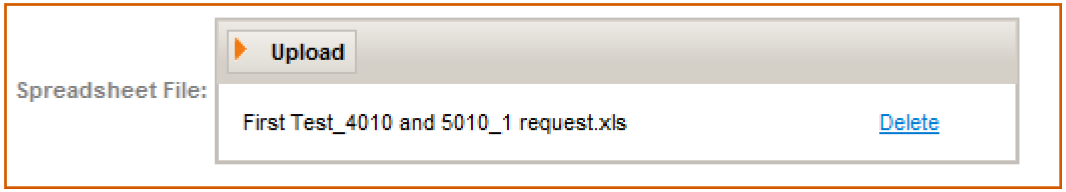


File Upload Tab (continued)

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.

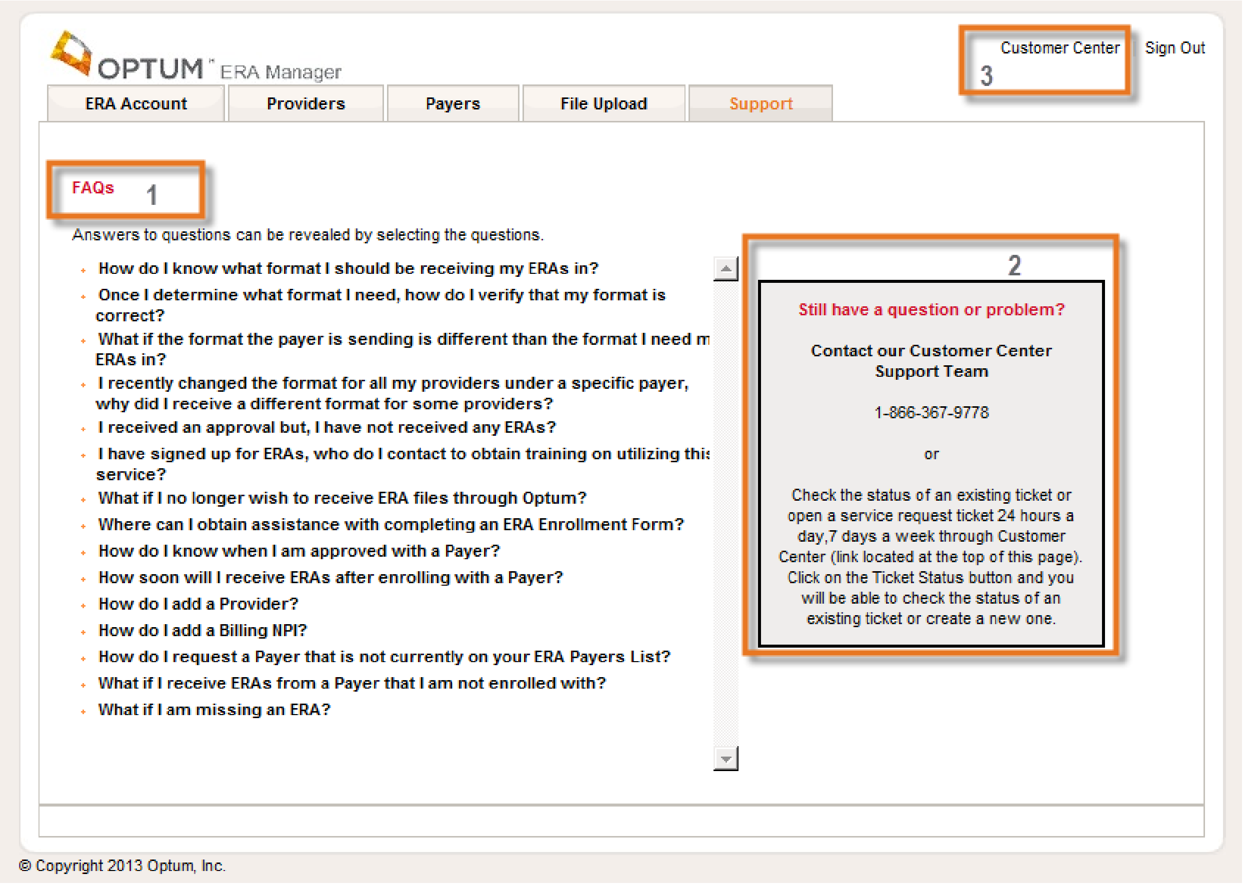
10 – Total Accepted. Displays the number of rows that were saved to our system. This is also a hyperlink to a spreadsheet that displays the accepted rows.

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

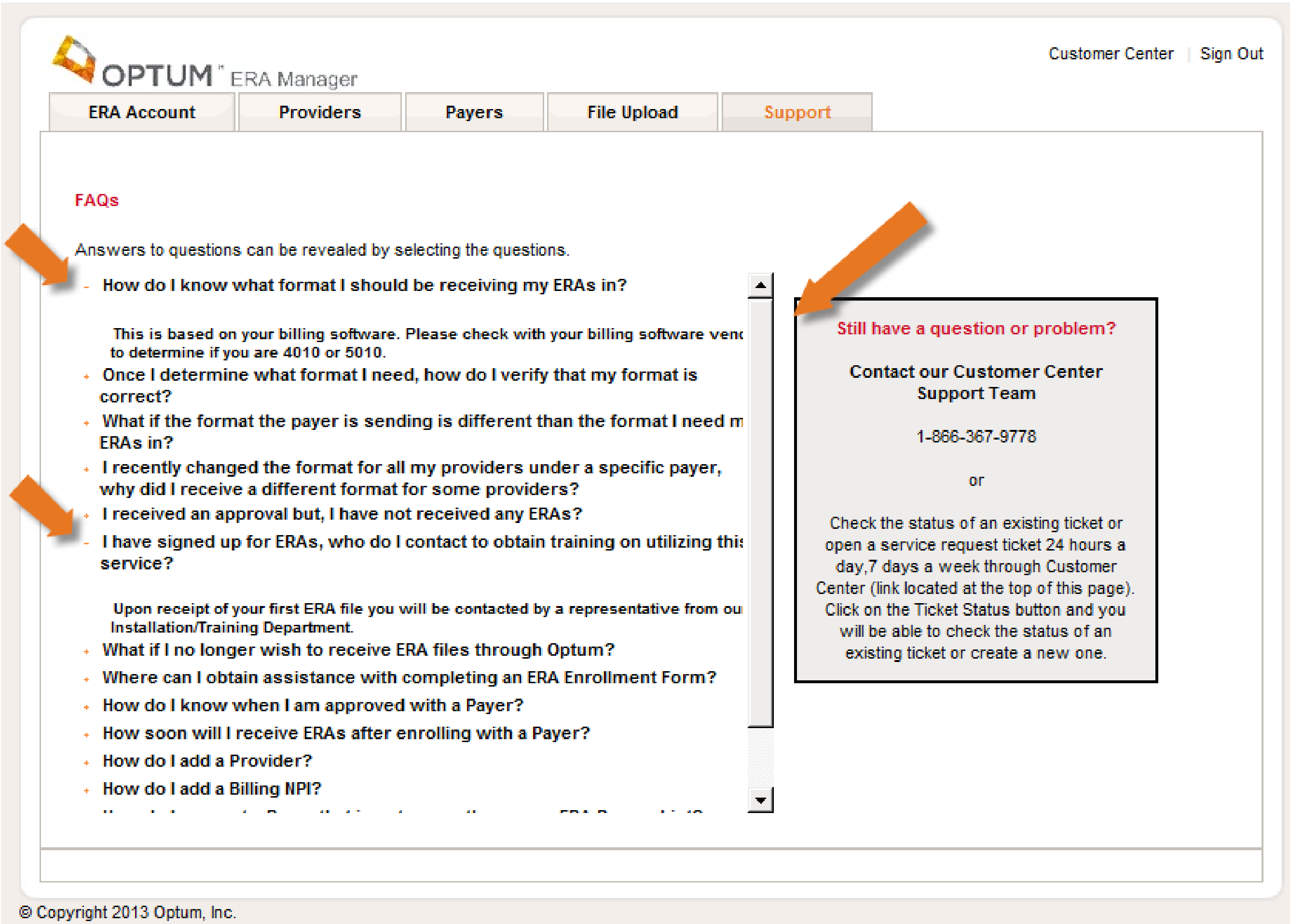


1 – FAQ Listing.

2 – Additional contact information.

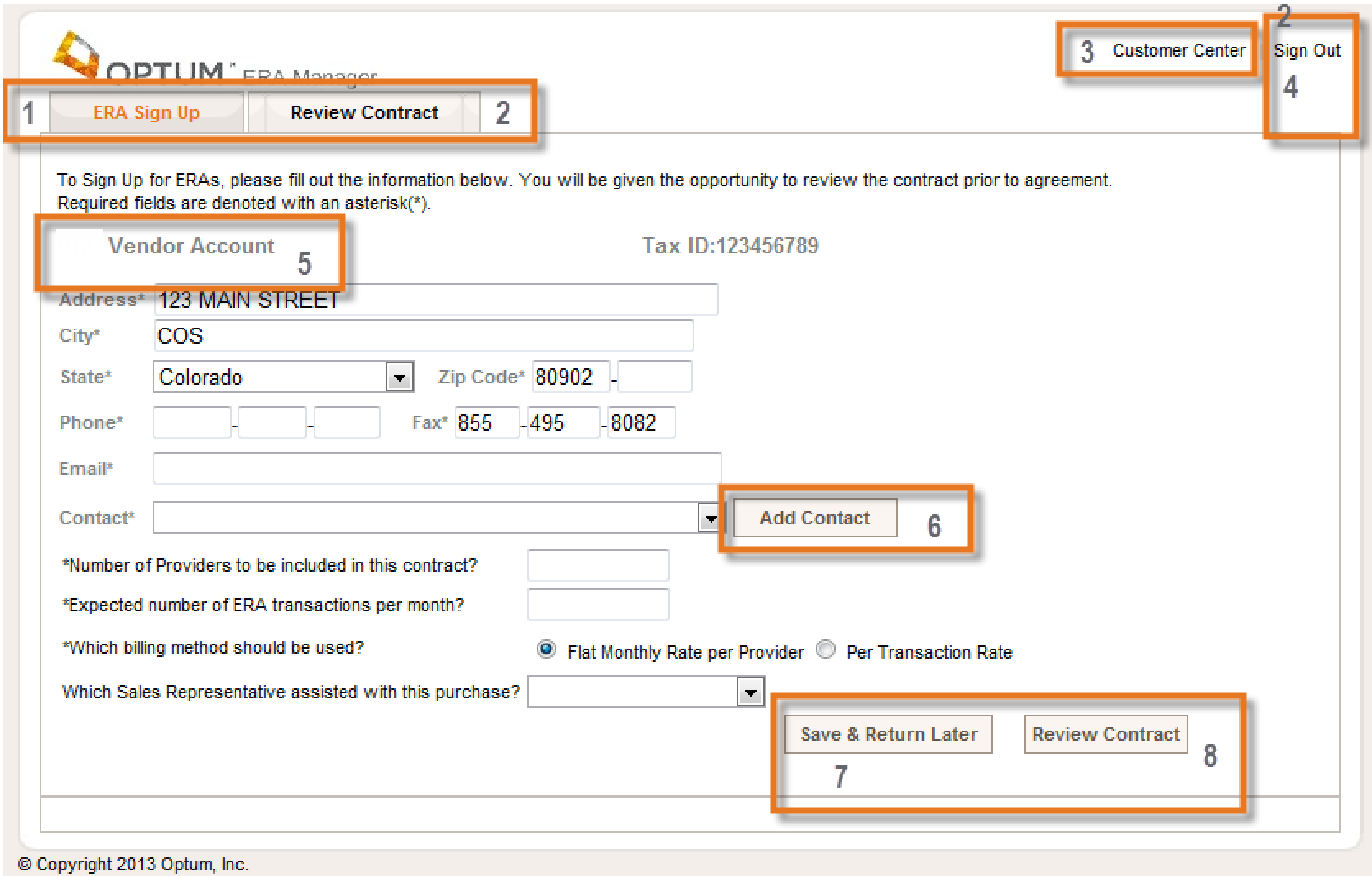
3 – Link to the Customer Center (User does not need to log in again).

Support Tab (continued)



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



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.

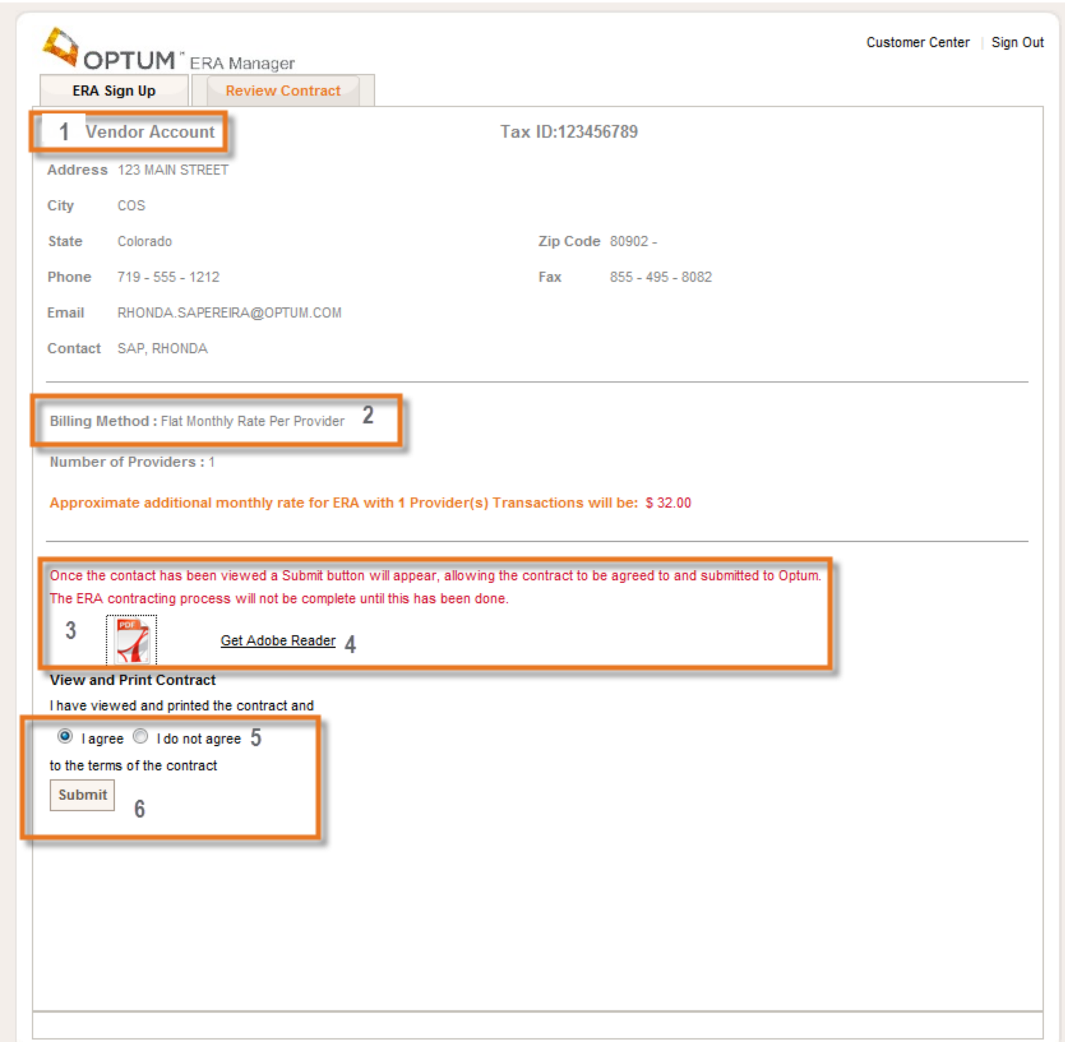
5 – Company Information. The Company Information is displayed here and is editable.

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)



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.

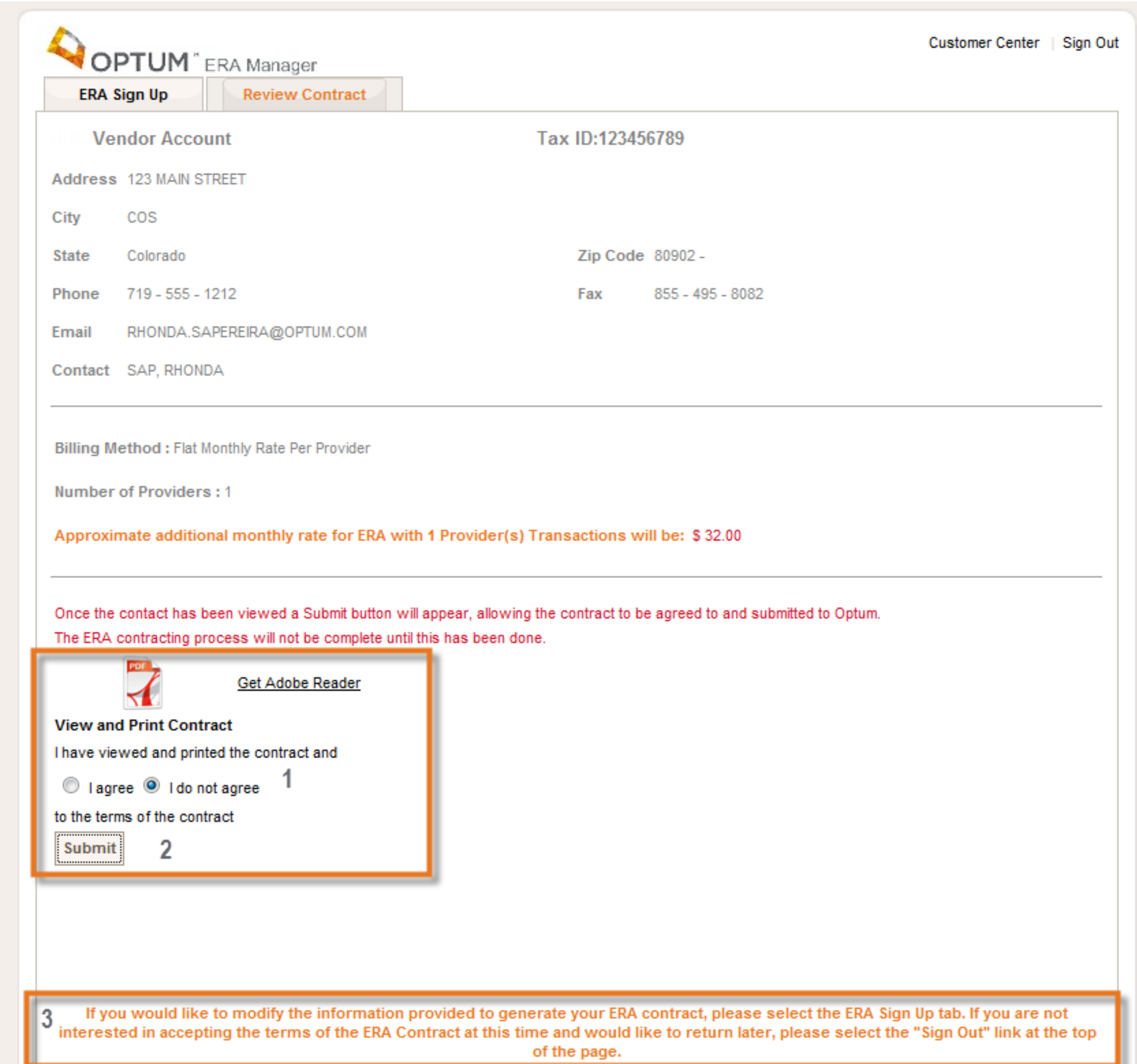
3 – Contracting. The User can view and print the contract prior to agreeing/disagreeing to the agreement.

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)

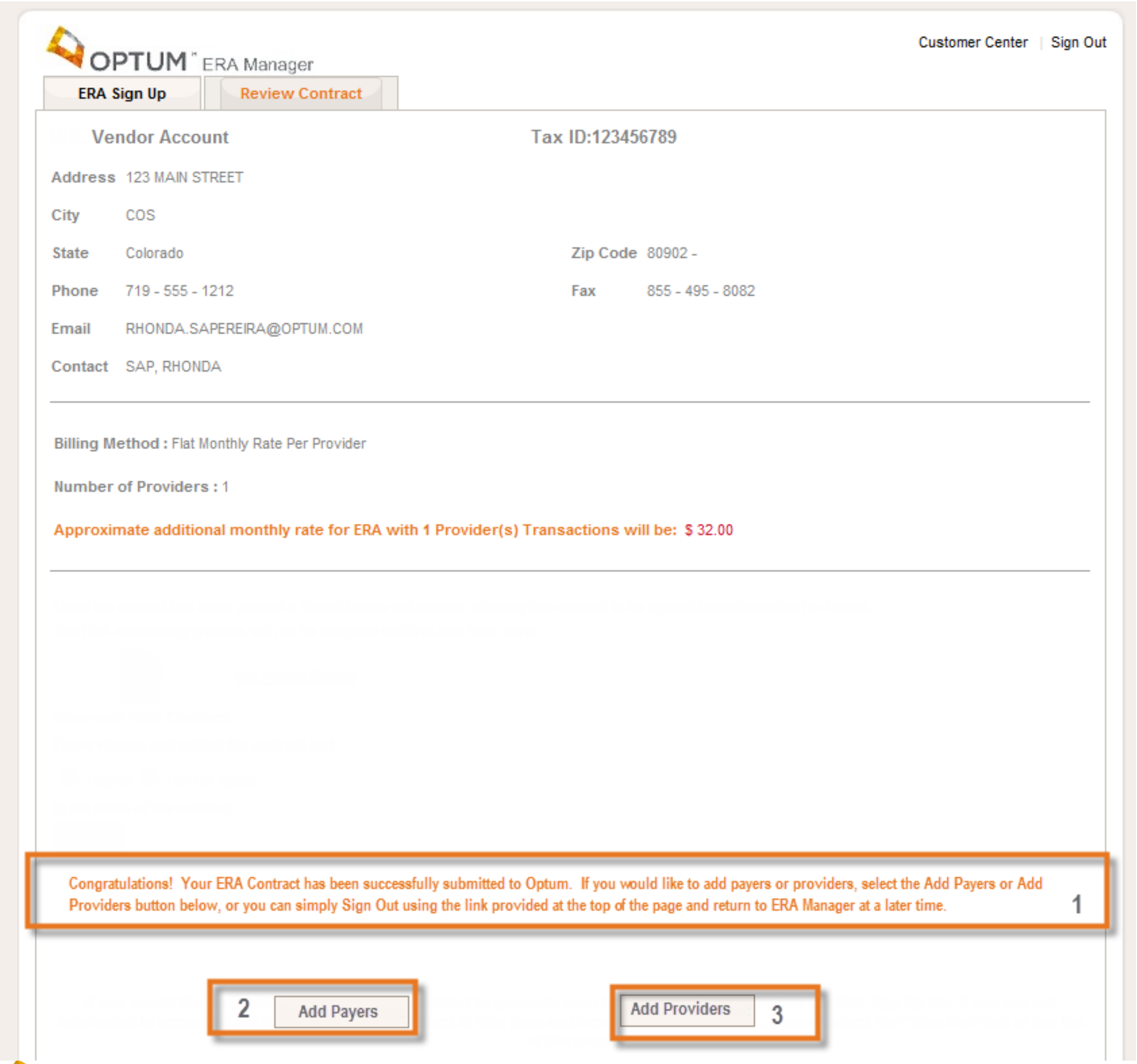


1 – The User selected I do not agree.

2 – The User selected Submit.

3 – The System provides the User their options.

New ERA Sign Up (continued)



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.