OPTUM™

ERA & EOB Training

Introduction

- What are ERAs and EOB
  - Explanation of Benefits (EOB) is a document that shows the details of the insured's doctor visit along with covered amount, dates of service, etc.
  - Electronic Remittance Advice (ERA) is the electronic version of the EOB
- This lesson will show you how to
  - Find the Optum Home Page
  - Log into Client Access
  - Access and view ERA files
  - View Check Summaries
  - Download ERA Files
  - View an Electronic EOB Image
  - Search for ERAs by Date, Check Number, or by Patiend
  - View the ERA Filename
- Read the instructions in the red highlighted boxes in this lesson
- Questions or problems can be reported to Technical Support at:
  - Email: service2@optum.com
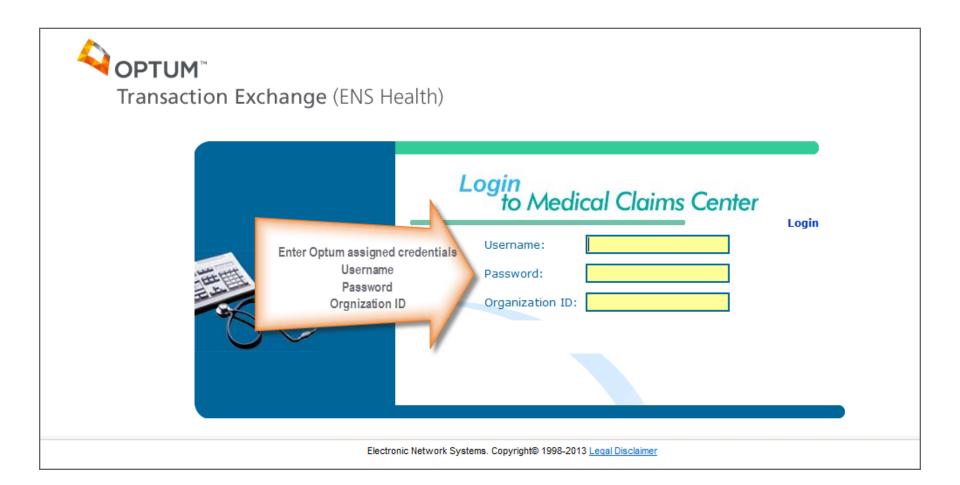 - Or phone: 1-866-367-9778

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Let's Get Started

From a web browser, locate the Optum Main Page at: http://www.enshealth.com
Helpful hint: Once you are at the Optum Main Page, save it as a favorite for future use

Logging In

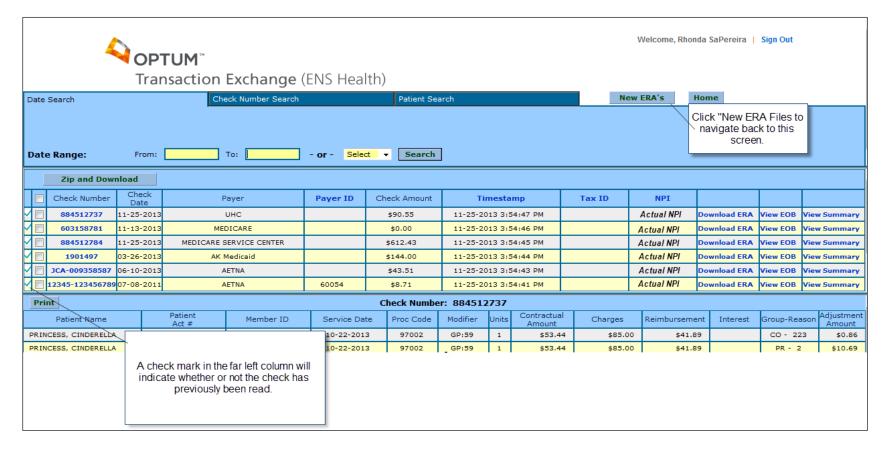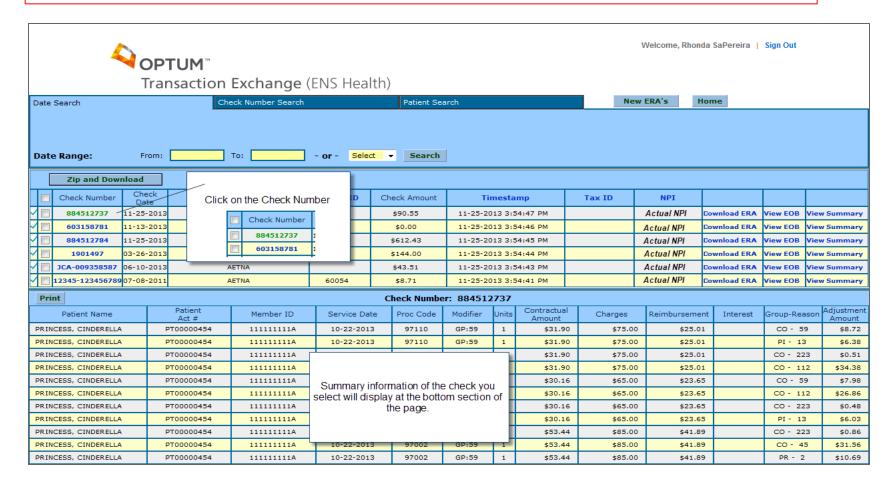# Access ERA

View New ERA Files

After you select the "Electronic Remittance Advice" tab, you will see the ERA Main Page which will display all new (Unread) ERA files. If you have navigated to other sections of the ERA pages, you can return to this screen by clicking the "New ERA's tab.

View Check Summary

There are two ways to view check summary: by clicking on "Check Number" or by clicking on "View Summary". Click on the Check Number to view the summary of the particular check you want to view. Detailed information about the check will display on the bottom section of the page.
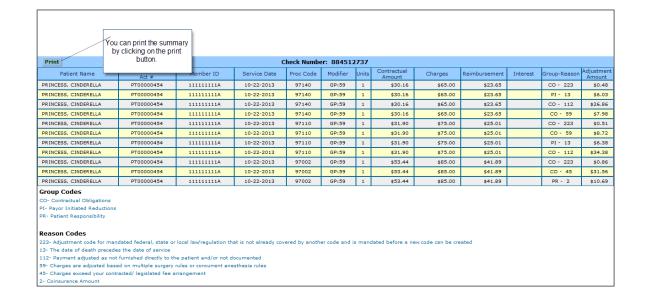
View Check Summary

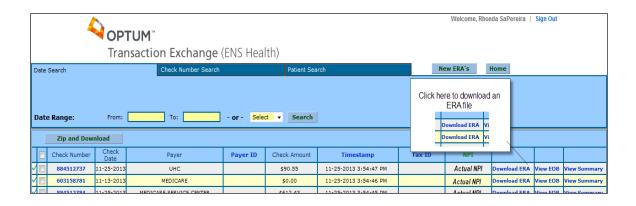To view the summary of the check, click on "View Summary"

This will generate a pop-up window (browser) on your screen that will display payment summary information for the check you have selected. You will be able to print the summary by clicking on the "Print" button.
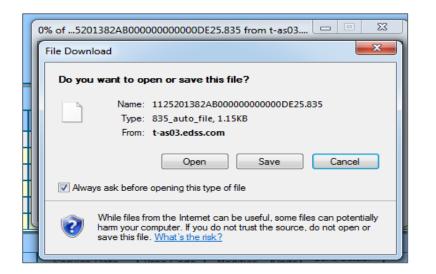
Download ERA Files – one by one or in a group

You can download a particular ERA file or zip and download one or more files. To download, click on the "Download ERA" link for the file you want to download.

You will be prompted to select either "open" or "Save". Click "Save" to save you ERA file to you computer.
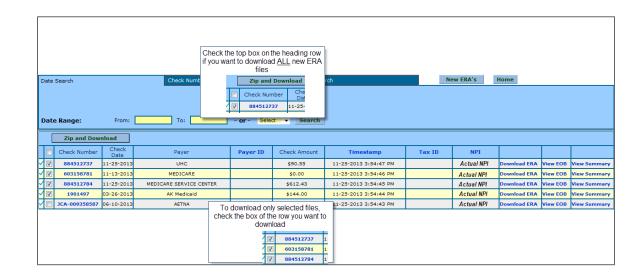
Download ERA Files, cont.

Then you will be prompted to select the location where you want to save the file. Once you select the location click "Save".
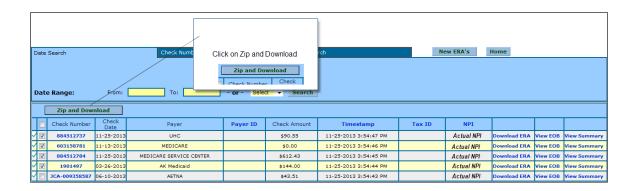
To zip and download ALL new ERA files, click the check box in the heading row. It will automatically check all of the new ERA files. To download only the selected files, check the box of every row you want to download
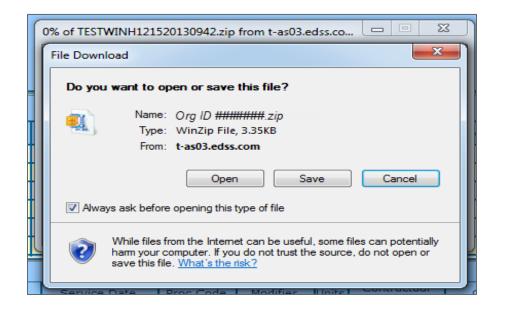
Download ERA Files, cont.

Once you select the files that you want to download, click "Zip and Download".

You will be prompted to download a zipped file, click "Save".

Download ERA Files, cont.

You will be prompted again to select the location where you want the file to be saved.
Once you select the location, click "Save".

View Electronic EOB Image of the ERA

The free available Adobe Acrobat reader is required to view and print EOB files. You can download Adobe Acrobat reader at http://www.adobe.com/products/acrobat/readsetp2.html
To view the EOB file, click "View EOB".

This will generate another pop-up window on your screen that displays the EOB image

Operating Rules CAGH, CARC, and RARC Business Scenarios

As part of the Operating Rules for Administrative Simplification, if the CAGH, CARC and RARC combination provided on the ERA match a Business Scenario, the appropriate Business Scenario(s) is provided on the EOB

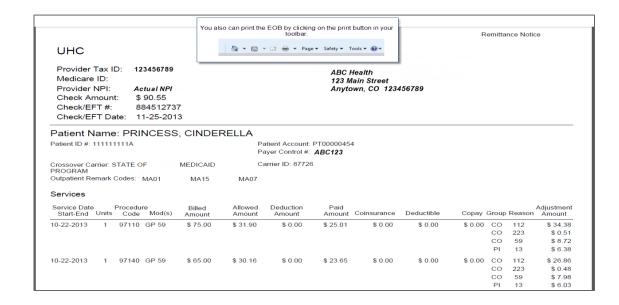Check/EFT #:   884512737
Check/EFT Date: 11-25-2013

Service Level Group Code Glossary

CO - Contractual Obligations
PI - Payor Initiated Reductions
PR - Patient Responsibility

Service Level Reason Code Glossary

112 - Payment adjusted as not furnished directly to the patient and/or not documented

223 - Adjustment code for mandated federal, state or local law/regulation that is not already covered by another code and is mandated before a new code can be created

59 - Charges are adjusted based on multiple sur...

13 - The date of death precedes the date of serv...

45 - Charges exceed your contracted/ legislated...

2 - Coinsurance Amount

> As part of the Operating Rules for Administrative Simplification, if the CAGH, CARC and RARC combination provided on the ERA matched a Business Scenario, the appropriate Business Scenario(s) is provided on the EOB.
>
> **Business Scenario**
>
> Additional Information Required – Missing/Invalid/Incomplete Documentation
> Additional Information Required – Missing/Invalid/Incomplete Data from Submitted Claim

Outpatient Remark Code Glossary

MA01 - If you do not agree with what we approved for these services, you may appeal our decision. To make sure that we are fair to you, we require another individual that did not process your initial claim to conduct the appeal. However, in order to be eligible for an appeal, you must write to us within 120 days of the date you received this notice, unless you have a good reason for being late.
MA15 - Your claim has been separated to expedite handling. You will receive a separate notice for the other services reported.

MA07 - The claim information has also been forwarded to Medicaid for review.

Business Scenario

Additional Information Required – Missing/Invalid/Incomplete Documentation
Additional Information Required – Missing/Invalid/Incomplete Data from Submitted Claim
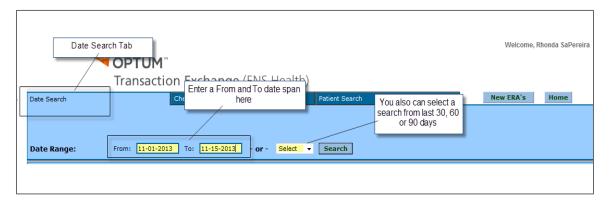
Search Options

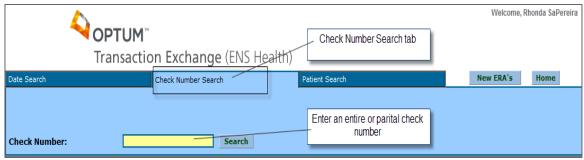There are 3 main search tabs the user can select from:
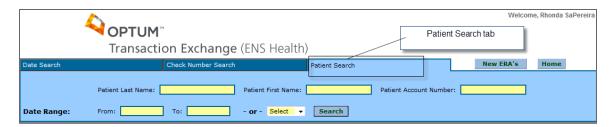
Date Search
On the Date Search, the user can enter a From and To date span, or a pre-defined search of 30, 60 or 90 days. This will return all checks within the timeframe specified.

Check Number Search
On the Check Number Search tab, the user can enter an entire or partial check number to search on.

Patient Search
On the Patient Search tab, the user can enter patient data to search for a check. This search option requires that a date range and at least one of the other elements (Last Name, First Name or Account Number) be present

Welcome, Rhonda SaPereira

Date Search Tab

OPTUM™
Transaction Exchange (ENS Health)

Enter a From and To date span here

Date Search   Che   Patient Search   New ERA's   Home

You also can select a search from last 30, 60 or 90 days

Date Range: From: 11-01-2013   To: 11-15-2013   - or -   Select ▼   Search

Welcome, Rhonda SaPereira

OPTUM™
Transaction Exchange (ENS Health)

Check Number Search tab

Date Search   Check Number Search   Patient Search   New ERA's   Home

Enter an entire or parital check number

Check Number: Search

Welcome, Rhonda SaPereira

OPTUM™
Transaction Exchange (ENS Health)

Patient Search tab

Date Search   Check Number Search   Patient Search   New ERA's   Home

Patient Last Name: Patient First Name: Patient Account Number:

Date Range: From: To: - or -   Select ▼   Search
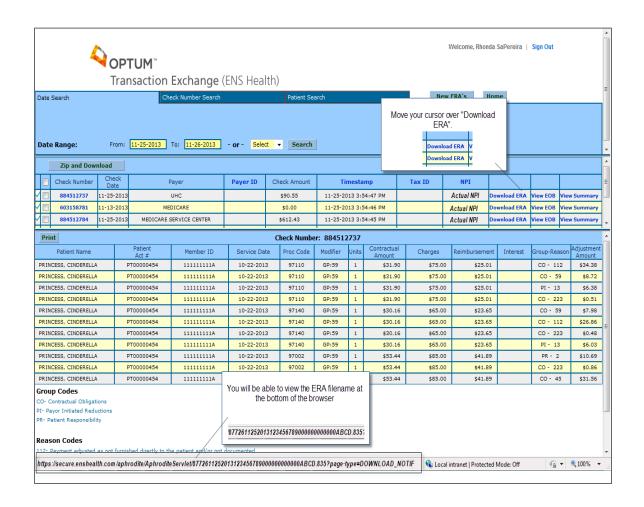
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Viewing the ERA File Name

You can view an ERA filename that you want to download by putting your cursor over the "Download ERA" link of that file.
The ERA filename will be shown on the bottom of the browser.
ERA filename format is:
Payer ID + Date + Tax ID + Internal Sequence #

Congratulations!

- You have now completed ERA and EOB self-service training
- Questions or problems can be reported to Technical Support at:
  - Email Technical Support at
    - » service2@optum.com
  - Or
    - » Call at 1-866-367-9778
- Thank You!

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