



# Electronic Payments & Statements User Guide



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# Welcome to Electronic Payments & Statements

With Electronic Payments and Statements (EPS) we deliver your claim payments and Explanation of Benefits (EOB) electronically, allowing your office faster payment, easier reconciliation, less paperwork and much greater efficiency.

## Say goodbye to:

- Check clearing wait time
- Check processing fees
- Searching through files for claim and payment information
- Frustrating reconciliation tasks

## And say hello to:

- Direct Deposit
- Online Payment and Claim information
- Fast and Easy information searches
- Simplified reconciliation



## This Guide will Show You How to:

- Download an electronic version of your remittance advice to use with your office computer billing software
- View and print hard copies of your remittance advice
- Search for payments and claims information by Date of Service, Account Number, Patient Name, Payment Number, and more
- Maintain your enrollment information, update office contacts, change bank account information and more

# Get more information about EPS on the Welcome Page

## Resources provides access to:

- FAQs
- Help
- User Guide
- Contact Us

## Registered EPS Users

- Select your TIN number from the drop down box.
- The EPS Welcome Page offers you options to View Payments, Search Remittance, Payer PRAs, Maintain Enrollment, Manage Users and My Profile.

## Closing EPS Welcome Page

- Select Logout in the upper right-hand corner to end your EPS session.

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Welcome, Mary Smith [Not You?](#)

Electronic Payments and Statements

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Home | View Payments | Search Remittance | Payer PRAs | **Maintain Enrollment** | Manage Users | My Profile

TIN: 900000010 - Enrolled

**Welcome Screen**

Electronic Payments and Statements (EPS) gives your organization the freedom to:

- ▶ Eliminate paper checks and receive electronic claims payments.
- ▶ Receive electronic remittance advices.
- ▶ Reconcile your claims quickly and more efficiently.

**News**

# View and Print Remittances

## View Payments

Review summary level information for payments

- Select the View Payments tab to display the **Payment Summary**

The screenshot displays the Optum web application interface. At the top left is the Optum logo. The main header reads "Electronic Payments and Statements". A navigation bar contains several tabs: "Home", "View Payments" (circled in red), "Search Remittance", "Payer PRAs", "Maintain Enrollment", "Manage Users", and "My Profile". On the right side, there is a "Resources" dropdown menu with options for "FAQs", "Help", "User Guide", and "Contact Us", and a "Logout" link. Below the navigation bar, the page shows a "Welcome Screen" for "Mary Smith" with a "Not You?" link. The TIN is displayed as "900000047 - Enrolled". The main content area states: "Electronic Payments and Statements (EPS) gives your organization the freedom to:" followed by a list of benefits: "Eliminate paper checks and receive electronic claims payments.", "Receive electronic remittance advices.", and "Reconcile your claims quickly and more efficiently." Below this is a "News" section with a large empty box.

## Payment Summary

- Payments display from the past 30 days as a default
- Select the Quick Search drop-down box to change payments display to the last 60 days or 90 days.
- Filter payments to view by National Provider Identifier (NPI) or TIN by choosing the appropriate selection in the 'Filter Payments' drop-down box located near the top of the page. (Applicable only if your organization designated payments by NPI number(s) during the EPS enrollment process. If you are already enrolled, but wish to designate future payments by NPI, please see page 19 for more information)
- Sort payments by selecting the arrow icon next to the column header. Arrow up indicates ascending order and arrow down descending order.
- View Remittance Details for a payment by locating the payment row and selecting the link for the corresponding Payment Number.
- Download a 835 file for a particular payment by selecting the link Download for the corresponding payment row.
- Print an electronic remittance advice (ERA) for a particular payment by selecting the link Print Request for the corresponding payment row. Adobe® Reader® is required to use this print feature. To download Adobe Reader, select the Adobe Reader icon.
- Print the entire Payment Summary page by selecting the button Print Payment Summary. From print preview, right click your mouse and choose the print command.
- View the Deposit Status of your payment. 'Successful ACH' will indicate your payment was sent electronically and has been deposited into your bank account. If your payment is returned, you will see a status of 'Failed'. You will be contacted by the EPS team to correct the issue relating to this payment or by hovering over the Failed status, you can obtain the appropriate number to call for assistance. If no resolution to issue by third business day, EPS will mark this payment as 'Successful Check' and you will be receiving a paper check from your Payer's bank.

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Electronic Payments and Statements

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**Payment Summary**  
Organization: ABC Provider Group

TIN: 840611484 - Enrolled  
Filter Payments: Show All  
Quick Search: Last 30 days

You have 3 remittance print requests available for printing. To print, please click on link 'Print Available'

(Click on column headings to re-sort payment information)

Payer	Payment Date	NPI	Payment Number	Amount	Type	Download 835	Print EPRA	Deposit Status
UnitedHealthcare	11/19/2012	1255617801	<a href="#">1QG11228628</a>	\$4.16	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	11/19/2012	1104045749	<a href="#">1QG31824221</a>	\$0.00	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	N/A
UnitedHealthcare	11/19/2012		<a href="#">9QG93011164</a>	\$9.63	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	11/19/2012		<a href="#">1QG91824219</a>	\$0.43	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	11/19/2012	1255314704	<a href="#">1QG41219671</a>	\$958.33	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	11/19/2012	1740262880	<a href="#">1QG41219669</a>	\$55.92	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	11/19/2012	1598747651	<a href="#">1QG93016102</a>	\$120.08	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	11/19/2012	1881679751	<a href="#">1QG93016101</a>	\$216.79	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	11/15/2012	1659352276	<a href="#">1041253449</a>	\$6.68	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	11/15/2012	1699858373	<a href="#">1041254041</a>	\$939.68	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	11/15/2012	1821073792	<a href="#">1041254709</a>	\$121.22	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	11/15/2012	1972588978	<a href="#">1041256138</a>	\$19.39	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	11/15/2012	1255314704	<a href="#">9041257812</a>	\$16,585.87	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	11/15/2012	1255314704	<a href="#">1041257813</a>	\$26,537.14	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH
UnitedHealthcare	11/15/2012	1104829159	<a href="#">1041259188</a>	\$36.87	DD	<a href="#">Download 835</a>	<a href="#">Print Request</a>	Successful ACH

In order to print the ERA, you must have Adobe Reader installed on your machine. Please download [Adobe Reader](#) if it is not installed on your machine.

[Print Payment Summary](#)

## Remittance Detail

After selecting the link **Payment Number** for a payment row, the **Remittance Detail** page will display all claims that are included in a particular payment

- Download a 835 file for a particular payment by selecting the button **Download 835**
- Print an electronic remittance advice (ERA) for a particular payment by selecting the button **Print Request**
- Return to Payment Summary by selecting the button **Return to Payment Summary**

- View **Additional Details** for a specific claim by selecting the **Claim Number** link for that claim
- View the **Explanation of a specific Adjustment Reason or Remark Code** by selecting the code link for that claim
- View a complete list of all Adjustment Reason and Remark Codes by selecting the column header link **Adj Reason Code or RMK Code**
- Print either the Adj Reason Code or RMK Code list by right clicking on the page and selecting print

- View any **Provider Level Adjustments (PLBs)** associated with a payment by selecting the last page and scrolling to the bottom of the page
- View PLBs by scrolling or, to view the full list without scrolling, select the button **Print Request** and print the last page


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**Electronic Payments and Statements**
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Remittance Detail

Organization: ABC Provider Group      Payment Date: 11/15/2012      Payment Number: 1041256138      Payment Type: Direct Deposit

NPI: 1972588978

1 Next Previous First Page Last Page Page 1 of 1 Filter Claims

Account Number	Patient Name / Patient ID		Subscriber ID / Corrected ID		Rendering Provider		Claim # / Claim Type			Group Policy Number / Product Name
Date(s) of Service	Description of Service	Amount Charged	Not covered	Prov Adj Discount	Amount Allowed	Deduct/Coins/ Copay	Amount Paid	Adj Reason Code	RMK Code	Patient Resp
92711250	JANE B JACKSON/ 123456789			123456789					<a href="#">GSO8017929200</a>	71590/ AARP MEDICARECOMPLETE PLUS
10/09/2012 - 10/09/2012	HC:87177	\$30.81	--	-\$13.81	\$17.00	-\$17.00	\$0.00	45, 3		\$17.00
10/09/2012 - 10/09/2012	HC:87209	\$62.19	--	-\$48.88	\$13.31	--	\$13.31	45		--
10/09/2012 - 10/09/2012	HC:89055	\$59.00	--	-\$55.84	\$3.16	--	\$3.16	45		--
Subtotal		\$152.00	\$0.00	-\$118.53	\$33.47	-\$17.00	\$16.47			\$17.00
50790211	DAVID R JONES/ 999888777			555888777					<a href="#">EVC8640222500</a>	21942/ ERICKSON ADVANTAGE CHAMPION
10/25/2012 - 10/25/2012	HC:85610	\$36.00	--	-\$33.09	\$2.91	--	\$2.91	45		--
10/25/2012 - 10/25/2012	HC:36415	\$23.00	--	-\$22.99	\$0.01	--	\$0.01	45		--
Subtotal		\$59.00	\$0.00	-\$56.08	\$2.92	\$0.00	\$2.92			\$0.00
58150868	CLAIRE B SMITH/ 111222333/ 321321321			111222333/ 321321321					<a href="#">EVC8642150600</a>	21942/ ERICKSON ADVANTAGE CHAMPION
09/13/2012 - 09/13/2012	HC:85610	\$59.00	--	-\$59.00	\$0.00	--	\$0.00	16	N388	--
Subtotal		\$59.00	\$0.00	-\$59.00	\$0.00	\$0.00	\$0.00			\$0.00

Total Paid to Provider: \$19.39



In order to print the ERA, you must have Adobe Reader installed on your machine. Please download [Adobe Reader](#) if it is not installed on your machine.

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## Print Electronic Remittance Advice

- Print an electronic remittance advice by selecting either **Print** or **Print Request** (ERAs that exceed 2500 pages can be made available for printing by clicking the **Print Request** link)Download dialog box will appear; select the button **Open**
- Adobe Reader will open and display the ERA
- Select the **Print** icon to print the ERA
- Adobe Reader is required to use this print feature

To download Adobe Reader, select the Adobe Reader icon located on the bottom left-hand corner of the screen

The screenshot shows the Optum Electronic Payments and Statements interface. A 'File Download' dialog box is open, displaying the file name '840611484.1QG11228628.20121119.pdf' and the source 'ppsp-stage-e.optumhealthfinancial.com'. The dialog box has 'Open', 'Save', and 'Cancel' buttons. In the background, a table lists payment information with columns for Payer, Payment Date, NPI, Type, Amount, and Deposit Status. A 'Download 835' button is visible in the table.

## Download 835 file Save 835 file

- Download the 835 file by selecting **Download 835** from the Download 835 column. Download dialog box will appear. Select **Save**
- The 835 file is now available to upload to your Practice Management System

The screenshot shows the Optum Electronic Payments and Statements interface. A 'File Download' dialog box is open, displaying the file name '1QG11228628.dat' and the source 'ppsp-stage-e.optumhealthfinancial.com'. The dialog box has 'Find', 'Save', and 'Cancel' buttons. In the background, a table lists payment information with columns for Payer, Payment Date, NPI, Type, Amount, and Deposit Status. A 'Download 835' button is visible in the table.

## Open 835 file

- Download the 835 file by selecting the link **Download 835** from the Download 835 column
- Download dialog box will appear and select the button **Find**

The screenshot shows the Optum Electronic Payments and Statements interface. A 'File Download' dialog box is open, asking if the user wants to save the file or find a program to open it. The file details are: Name: 1QG11228628.dat, Type: Unknown File Type, From: ppsp-stage-e.optumhealthfinancial.com. Below the dialog is a table of payment records with columns for Payer, Payment Date, and Amount. The table shows several rows of payment data from UnitedHealthcare.

Payer	Payment Date	Amount
UnitedHealthcare	11/19/2012	
UnitedHealthcare	11/19/2012	1598747651
UnitedHealthcare	11/19/2012	1881679751
UnitedHealthcare	11/15/2012	1659352276
UnitedHealthcare	11/15/2012	1699858373
UnitedHealthcare	11/15/2012	1821073792

- Depending on which Windows operation System is running on your computer, a new window will open with information on software available to open your file.
- Select from software available to open your .dat file.
- Open With dialog box will appear, under Recommended Programs. Select Notepad, and then select OK

The screenshot shows a Windows Internet Explorer browser window displaying the 'Windows File Association' page. The page provides information about the file type 'Data File' with the extension '.dat'. It lists software or information available at the bottom, including 'WordPerfect Office' and 'Free File Viewer'.

**File Type:** Data File  
**File Extension:** .dat  
**Description:** A wide range of applications create files with this file extension but with different file formats. The application(s) listed below may not work on your file.  
**Software or information available at:**

- [WordPerfect Office](#)
- [Free File Viewer](#)

## Claim Detail

After selecting the link **Claim Number** for a payment row, the **Claim Detail** page will display all service level and adjustment information for a single claim

- Each adjustment will display on a row corresponding to the appropriate service

- Print the Claim Detail by selecting the button **Print Claim Detail**
- Return to the Remittance Detail by selecting the button **Return to Remittance Detail**



Welcome, Mary Smith [Not You?](#)

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### Electronic Payments and Statements

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**Claim Detail**

Organization: **ABC Provider Group**  
NPI: 1972588978

Payment Date: 11/15/2012    Payment Number: **1041256138**    Payment Type: Direct Deposit

Account Number		Patient Name/ Patient ID		Subscriber ID/ Corrected ID		Rendering Provider		Claim #			Group Policy Number/ Product Name
Date(s) of Service	Description of Service	Amount Charged	Not covered	Prov Adj Discount	Amount Allowed	Deduct/ Coins/ Copay	Amount Paid	Adj Reason Code	RMK Code	Patient Resp	
92711250	JANE B JACKSON/ 123456789				123456789					GSO8017929200	71590/ AARP MEDICARECOMPLETE PLUS
10/09/2012 - 10/09/2012	HC:87177	\$30.81			\$17.00		\$0.00				
			--	-\$13.81			--	45			--
			--	--			-\$17.00	3			\$17.00
							<b>Service Subtotal:</b>	<b>\$0.00</b>			
10/09/2012 - 10/09/2012	HC:87209	\$62.19			\$13.31		\$13.31				
			--	-\$48.88			--	45			--
							<b>Service Subtotal:</b>	<b>\$13.31</b>			
10/09/2012 - 10/09/2012	HC:89055	\$59.00			\$3.16		\$3.16				
			--	-\$55.84			--	45			--
							<b>Service Subtotal:</b>	<b>\$3.16</b>			
Total Claim Paid: \$16.47											

--- indicates payer has not supplied this information.


In order to print the Claim, you must have Adobe Reader installed on your machine. Please download [Adobe Reader](#) if it is not installed on your machine.

Return to Remittance Detail
Print Claim Detail

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# Search Remittance

Payment and claim search using Electronic Payments and Statements

- Select the link **Search Remittance** to display eight search options

- Search for payments and claims by Date(s) of Service, Account Number, Subscriber ID, Patient Name, Payment Number, Zero Payment Claims, National Provider Identifier (NPI), or Claim Number

- Use Search Remittance to look up claim data for the past 13 months
- Select the radio button for the search option desired

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Electronic Payments and Statements

Home View Payments **Search Remittance** Payer PRAs Maintain Enrollment Manage Users My Profile

Welcome Screen TIN: 900000010 - Enrolled

Electronic Payments and Statements (EPS) gives your organization the freedom to:

- ▶ Eliminate paper checks and receive electronic claims payments.
- ▶ Receive electronic remittance advices.
- ▶ Reconcile your claims quickly and more efficiently.

News

- **Search Criteria Definitions** are available for more information by selecting **Click here** link

Search Criteria Definitions

- Date of Service - Search Date of Service (the date the patient received the service) or Payment Date (the date your organization was paid for this claim) - You may also include the Rendering Provider Name to refine your search.
- Account Number - Search by the patient account number.
- Subscriber Id - Search for the subscriber ID in a date range using either Date of Service or Payment Date.
- Patient Name - Search by patient first and last name.
- Payment Number - Search by unique payment number.
- Zero Payment Claims - Search for claims where the net payment to the organization was zero within a date range using either Date of Service or Payment Date.
- NPI - Search by National Provider Identifier.
- Claim Number(Exact Match) - Search by Claim Number.

## Search by Date(s) of Service

- Select the radio button for **Date of Service**
- Select **Calendar icon** to enter the Start Date and End Date
- Optional Secondary Search is to enter the **Rendering Provider Last Name**
- **Reset/Clear Search** at anytime by selecting a different radio button or by selecting the button **Search Remittance**

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**Search Remittance**

Organization: ABC Provider Group TIN: 900000010 - Enrolled

Please search for claims using one of the following options (for more information, click [here](#))

Date(s) of Service  Account Number  Subscriber ID  Patient Name  Payment Number  Zero Payment Claims  NPI  Claim Number (Exact Match)

Choose Date Type:	Start Date	End Date
<input checked="" type="radio"/> Date(s) of Service	MM / DD / YYYY	MM / DD / YYYY
<input type="radio"/> Payment Date		

Secondary Search (Optional)

Rendering Provider Last Name

Search Remittance

NOTE : Payment Number and NPI are the only search parameters available for Capitation Payments.  
+ Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers.

## Search by your Patient Account Number

- Select the radio button for **Account Number**
- Enter **Account Number**
- Optional Secondary Search options available by Date of Service or Payment Date

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**Search Remittance**

Organization: ABC Provider Group TIN: 900000010 - Enrolled

Please search for claims using one of the following options (for more information, click [here](#))

Date(s) of Service  Account Number  Subscriber ID  Patient Name  Payment Number  Zero Payment Claims  NPI  Claim Number (Exact Match)

Account Number

Secondary Search (Optional)

Choose Date Type:	Start Date	End Date
<input checked="" type="radio"/> Date(s) of Service	MM / DD / YYYY	MM / DD / YYYY
<input type="radio"/> Payment Date		

Reset Dates Search Remittance

NOTE : Payment Number and NPI are the only search parameters available for Capitation Payments.  
+ Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers.

## Search by Subscriber ID

- Select the radio button for **Subscriber ID**
- Enter **Subscriber ID**
- Optional Secondary Search options available by Date of Service or Payment Date

The screenshot shows the Optum website's search interface. At the top left is the Optum logo and the text "Electronic Payments and Statements". On the top right, it says "Welcome, Mary Smith" with a "Not You?" link, and "Resources | Logout". A navigation bar contains buttons for "Home", "View Payments", "Search Remittance" (highlighted), "Payer PRAs", "Maintain Enrollment", "Manage Users", and "My Profile".

Under "Search Remittance", the "Organization" is "ABC Provider Group" and the "TIN" is "900000010 - Enrolled". A message says "Please search for claims using one of the following options (for more information, click [here](#))".

Search options include:
 

- Date(s) of Service
- Account Number
- Subscriber ID
- Patient Name
- Payment Number
- Zero Payment Claims
- NPI
- Claim Number (Exact Match)

Below these is a "Subscriber ID" input field. A "Secondary Search (Optional)" section has a "Choose Date Type:" header with two options:
 

- Date(s) of Service
- Payment Date

 Each option has a "Start Date" and "End Date" field with a date picker icon. At the bottom right of this section are "Reset Dates" and "Search Remittance" buttons.

NOTE: Payment Number and NPI are the only search parameters available for Capitation Payments.  
 + Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers.

## Search by Patient Name

- Select the radio button for **Patient Name**
- Enter **Patient Last Name and First Name**
- Optional Secondary Search options available by Date of Service or Payment Date

This screenshot is identical to the one above, showing the search interface for Subscriber ID. The only difference is in the search options, where the "Patient Name" radio button is selected instead of "Subscriber ID".

Search options include:
 

- Date(s) of Service
- Account Number
- Subscriber ID
- Patient Name
- Payment Number
- Zero Payment Claims
- NPI
- Claim Number (Exact Match)

Below these are two input fields for "Patient Name", labeled "Last Name" and "First Name". The "Secondary Search (Optional)" section and the rest of the page are identical to the previous screenshot.

## Search by Payment Number

- Select the radio button for **Payment Number**
- Select radio button for **Check Number** or **Electronic Payment Number**
- Enter **Payment Number**

The screenshot shows the Optum Electronic Payments and Statements search interface. The user is logged in as Mary Smith. The navigation menu includes Home, View Payments, Search Remittance (selected), Payer PRAs, Maintain Enrollment, Manage Users, and My Profile. The search criteria are set to Organization: ABC Provider Group and TIN: 900000010 - Enrolled. The search options are: Date(s) of Service, Account Number, Subscriber ID, Patient Name, Payment Number (selected), Zero Payment Claims, NPI, and Claim Number (Exact Match). Under the Payment Number section, the user has selected the Electronic Payment Number radio button and entered a value in the adjacent text field. A Search Remittance button is located at the bottom right of the search area.

NOTE : Payment Number and NPI are the only search parameters available for Capitation Payments.  
 + Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers.

## Search by Zero Payment Claims

- Zero Payment Claims refers to adjustment claims or denied claims
- Select the radio button for either **Date of Service** or **Payment Date**
- Select the **Calendar icon** to enter the Start Date and End Date
- Optional Secondary Search is to enter the **Patient's Last Name**

The screenshot shows the Optum Electronic Payments and Statements search interface. The user is logged in as Mary Smith. The navigation menu includes Home, View Payments, Search Remittance (selected), Payer PRAs, Maintain Enrollment, Manage Users, and My Profile. The search criteria are set to Organization: ABC Provider Group and TIN: 900000010 - Enrolled. The search options are: Date(s) of Service, Account Number, Subscriber ID, Patient Name, Payment Number, Zero Payment Claims (selected), NPI, and Claim Number (Exact Match). Under the Zero Payment Claims section, the user has selected the Date(s) of Service radio button. The Start Date and End Date fields are populated with MM/DD/YYYY and include calendar icons. A Secondary Search (Optional) section is visible with a Patient Last Name text field. A Search Remittance button is located at the bottom right of the search area.

NOTE : Payment Number and NPI are the only search parameters available for Capitation Payments.  
 + Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers.

## Search by National Provider Identifier (NPI)

- If your organization is directing payments to multiple checking accounts under a single Tax Identification Number (TIN), you can view payments by NPI
- Select the radio button for **NPI**
- Select the radio button for either the **Date of Service** or **Payment Date**
- Select the **Calendar icon** to enter the Start Date and End Date

The screenshot shows the Optum Electronic Payments and Statements search interface. The user is logged in as Mary Smith. The search criteria are set to "Search Remittance" with Organization "ABC Provider Group" and TIN "900000010 - Enrolled". The search options include Date(s) of Service, Account Number, Subscriber ID, Patient Name, Payment Number, Zero Payment Claims, NPI (selected), and Claim Number (Exact Match). The "Choose Date Type:" section has "Date(s) of Service" selected, with fields for Start Date and End Date. A "Secondary Search (Optional)" section includes a field for Patient Last Name. A "Search Remittance" button is at the bottom right.

NOTE : Payment Number and NPI are the only search parameters available for Capitation Payments.  
 + Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers.

## Search by Claim Number

- Select the radio button for **Claim Number**
- Enter **Claim Number**

The screenshot shows the Optum Electronic Payments and Statements search interface. The user is logged in as Mary Smith. The search criteria are set to "Search Remittance" with Organization "ABC Provider Group" and TIN "900000010 - Enrolled". The search options include Date(s) of Service, Account Number, Subscriber ID, Patient Name, Payment Number, Zero Payment Claims, NPI, and Claim Number (Exact Match) (selected). A "Claim Number" search field is present. A "Search Remittance" button is at the bottom right.

NOTE : Payment Number and NPI are the only search parameters available for Capitation Payments.  
 + Please be aware that not all Payers will submit a full 835 file to EPS. As a result, EPS will only display payment related data for these Payers.

## Search Results

- Displays claims that match the chosen search criteria
- Select the link Payment Number to view the Remittance Details
- Select the Claim Number link to view the Claim Details
- Select button Print Search Results to print information
- Print preview page displays and then right click and choose the Print Command
- Select button New Search to begin a new search

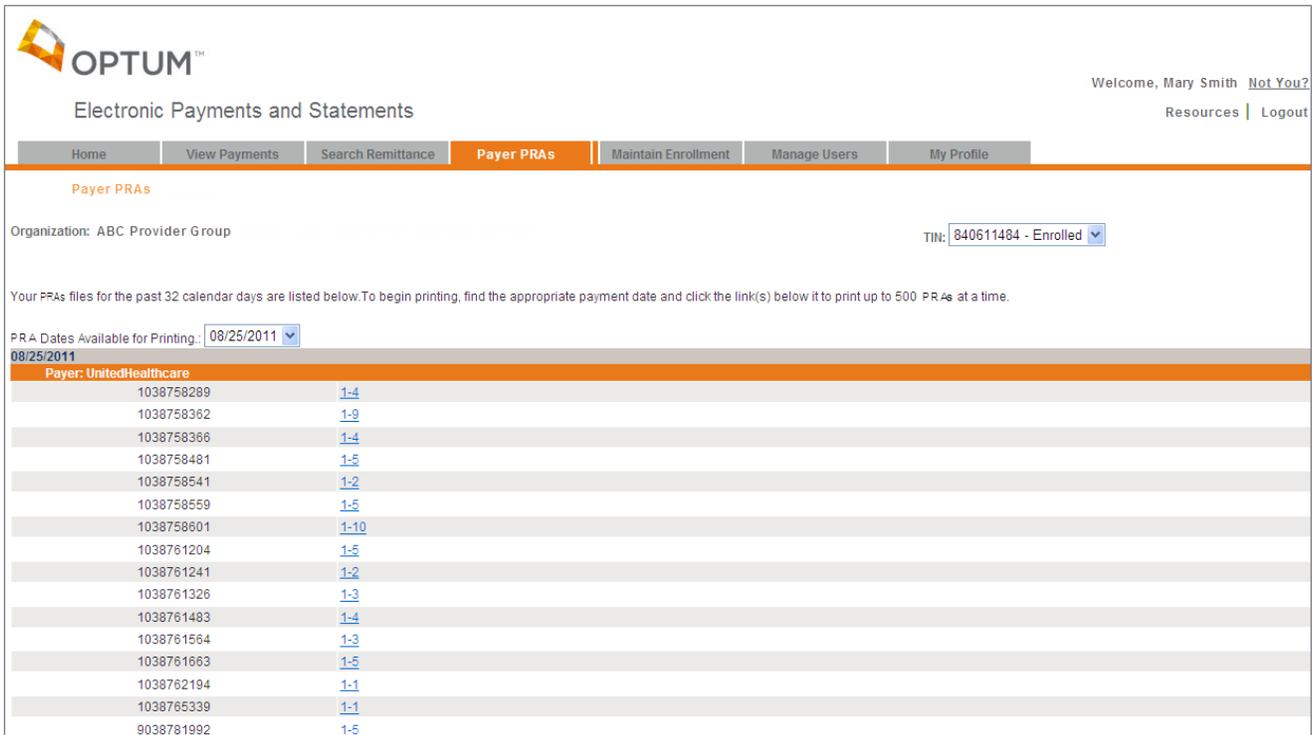
# Payer PRAs View and Print

- From the EPS Welcome Page, select the Payer PRAs tab
- You may view and print up to 500 Payer PRAs at a time
- Individual PRAs for the past 15 business days are available using the Payer PRAs feature.



## PRA Printing

- Locate the desired payment date
- Select the link segment to open the PRA files for that payment date (Payer PRA files are available for the past 15 business days)



- Payer PRAs processing screen displays while PRAs are downloading from the server
- Upon completion of download. Adobe Reader will launch containing up to 500 PRAs
- Select the **Calendar icon** to enter the Start Date and End Date

The screenshot shows the Optum web application interface for 'Electronic Payments and Statements'. The user is logged in as Mary Smith. The 'Payer PRAs' tab is active in the navigation menu. A 'File Download' dialog box is open, asking if the user wants to open or save a PDF file named '87726.111187726.1038758289.1.4.pdf' from 'ppsp-stage-e.optumhealthfinancial.com'. The background shows a list of Payer PRAs for 'UnitedHealthcare' with various ID numbers and page counts.

**Organization:** ABC Provider Group

**TIN:** 840611484 - Enrolled

Your PRAs files for the past 32 calendar days are listed below. To begin printing, click on the calendar icon to select a date range. You can download up to 500 PRAs at a time.

PRA Dates Available for Printing: 08/25/2011

Payer: UnitedHealthcare	
1038758289	1-4
1038758362	1-9
1038758366	1-4
1038758481	1-5
1038758541	1-2
1038758559	1-5
1038758601	1-10
1038761204	1-5
1038761241	1-2
1038761326	1-3
1038761483	1-4
1038761564	1-3
1038761663	1-5
1038762194	1-1
1038765339	1-1
9038781992	1-5
9038782111	1-1
9038782844	1-4
9038785220	1-2
Payer: UnitedHealthcare	
1038736531	1-1
1038739865	1-1

- Select the **Print icon** and '**OK**' to print the PRAs
- The Print All PRA page is still open behind in a separate window. You can print additional PRA files, if required
- To close Adobe Reader, select the **Close Window "X" box** on the upper right corner

The screenshot shows a PDF viewer window with a 'Print' dialog box open. The dialog box has a blue title bar and contains the following sections:

- Printer:** Microsoft XPS Document Writer (with 'Properties' and 'Advanced' buttons)
- Copies:** 1
- Pages to Print:** All (selected), Current page, Pages 1 - 21
- Page Sizing & Handling:** Size, Poster, Multiple, Booklet buttons; Size Options: Fit, Actual size, Shrink oversized pages (selected), Choose paper source by PDF page size; Orientation: Auto portrait/landscape (selected), Portrait, Landscape; Want to print colors as gray & black? (info icon)
- Comments & Forms:** Document and Markups dropdown, Summarize Comments button, 8.5 x 11 Inches
- Navigation:** Previous/Next page arrows, Page 1 of 21, Print, Cancel buttons

The background document page includes the following text and table:

217ZCCPAU00200801 BNAME

**AARP** MedicareComplete®  
Specialty Services, Prescription Services

UNI  
P.O.  
SAL

**A MEMBER OF SERVICES**

ABC Provid  
123 Main St  
Anywhere,

PROV NO. 0035-000000

**MEMBER TISDALE,**

CLAIM NO. 64006572-00  
REND PROV ID 1740262880

PCP NAME SWAN, M.D.,

DOS	PROC	U
07/28/11	85610	01

CLAIM TOTAL 51.00 10.00 41.00 .00

# Maintain Enrollment

The **Maintain Enrollment** feature allows you to view or update existing enrollment details for an organization.

- To view current enrollment information for an organization select **Maintain Enrollment**

The screenshot shows the Optum Electronic Payments and Statements interface. The navigation bar includes: Home, View Payments, Search Remittance, Payer PRAs, **Maintain Enrollment** (circled in red), Manage Users, and My Profile. The user is logged in as Mary Smith. The TIN is 900000010 - Enrolled. The main content area displays a 'Welcome Screen' with a list of benefits: Eliminate paper checks and receive electronic claims payments, Receive electronic remittance advices, and Reconcile your claims quickly and more efficiently. There is also a 'News' section below.

## From the Organization Information page

- Select **Edit** to begin updates

The screenshot shows the 'Organization Information' page in the Optum Electronic Payments and Statements interface. The navigation bar includes: Home, View Payments, Search Remittance, Payer PRAs, **Maintain Enrollment**, Manage Users, and My Profile. The user is logged in as Mary Smith. The TIN is 111111111 - Enrolled. There are 'Edit' and 'Cancel' buttons. The page displays the following information:

Organization Information			
OrganName	TIN: 111111111	Enrollment ID:	11111111061113200107
Address1	Enrollment Status: Active	Enrollment Date:	11/13/2006
City Name, MD 11111 -0000	Enrollment Status Date: 11/13/2006	Market Type:	Behavioral Health Medical

Organization Bank Account at TIN Level			
Bank Name:	Bank of USA	Routing Transit Number:	123123123
Bank Address:	123 Main St Anywhere, ST 12345	Account Number:	111111111
Phone Number:	111-111-1111	Account Type:	Checking
		ACH Addenda Record Type:	CCD

Enroller's Information	
Name:	James Jones
Contact Email Address:	Payables_qa@uhc.com
Phone Number:	111-111-1111

**Payer Information**

**National Provider Identifier Information**

- National Provider Identifier - 1242354345
- National Provider Identifier - 1321435782

## Organization Tab

- Enter changes to Organization Information. Then click **Continue** to continue making changes, **Cancel** to cancel changes, or **Finish** if changes are complete



Welcome, Mary Smith [Not You?](#)

Electronic Payments and Statements [Resources](#) | [Logout](#)

Home | View Payments | Search Remittance | Payer PRAs | **Maintain Enrollment** | Manage Users | My Profile

Online Enrollment Form Continue Cancel Finish

Organization | Payer(s) | Bank Accounts | NPI | NPI Bank Account

Sections denoted with an \* are required for enrollment.

**\*Organization Information**

Organization Name:	<input type="text" value="OrganName"/>	TIN:	111111111
Address:	<input type="text" value="Address1"/>	Enrollment ID:	11111111061113200107
City:	<input type="text" value="City Name"/>	Enrollment Date:	11/13/2006
State:	MD <input type="text" value="11111"/> <input type="text" value="0000"/>	Enrollment Status:	Active
		Enrollment Status Date:	11/13/2006
		Market Type:	<input checked="" type="checkbox"/> Behavioral Health <input type="checkbox"/> Cardiac <input type="checkbox"/> Dental <input checked="" type="checkbox"/> Medical <input type="checkbox"/> Vision

Please refer to the Manage Users tab to view or edit users.

Continue Cancel Finish

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## Payers Tab

- Update the Payment Method for a specific Payer by clicking on the button in either the Direct Deposit or Check column

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Home | View Payments | Search Remittance | Payer PRAs | **Maintain Enrollment** | Manage Users | My Profile

Edit Enrollment [Continue](#) [Cancel](#) [Finish](#)

Payer Information				Payment Method	
Payer Name	Payer Id	Payer Offers	Status	Check	Direct Deposit
AARP - Bad 5010 Payer	MOIS5	DD / CHK	Submitted	<a href="#">Check</a>	<a href="#">Direct Deposit</a>
AARP UnitedHealthcare Ins Co	36273	DD	Active	<a href="#">Check</a>	<a href="#">Direct Deposit</a>
American Medical Security	81400	DD	Active	<a href="#">Check</a>	<a href="#">Direct Deposit</a>
City of Minneapolis	CMAR1	DD / CHK	Active	<a href="#">Check</a>	<a href="#">Direct Deposit</a>
Dental Benefit Providers	52133	DD	Submitted Activation	<a href="#">Check</a>	<a href="#">Direct Deposit</a>
ECHO	ECHOH	DD	Active	<a href="#">Check</a>	<a href="#">Direct Deposit</a>

## Bank Accounts Tab

- To update Organization Bank Account(s) Information, from the 'Resources' menu, select 'Contact Us' for EPS Support information
- Note: Changes to Organization Bank Account(s) Information must be submitted in writing
- Click **Continue** to continue making changes, **Cancel** to cancel changes or **Finish** if changes are complete

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Welcome, Mary Smith [Not You?](#)

Electronic Payments and Statements [Resources](#) | [Logout](#)

Home | View Payments | Search Remittance | Payer PRAs | **Maintain Enrollment** | Manage Users | My Profile

Edit Enrollment [Continue](#) [Cancel](#) [Finish](#)

**To update organization Bank Accounts information, please call 1-877-620-6194.**

**Organization Bank Account at TIN Level**

Bank Name:	WACHOVIA N A	Routing Transit Number:	053000219
Bank Address:	Bank Address	Account Number:	2074228052466
	Bank City, UT 00000-0000	Account Type:	Checking
Phone Number:	999-999-9999	ACH Addenda Record Type:	CCD

[Continue](#) [Cancel](#) [Finish](#)

## National Provider Identifier Tab

- To update EPS payments at the National Provider Identifier (NPI) information, from the 'Resources' menu, select 'Contact Us' for EPS Support information
- Note: Changes to NPI information must be submitted in writing
- Click **Continue** to continue making changes, **Cancel** to cancel changes or **Finish** if changes are complete

The screenshot shows the Optum web interface. At the top left is the Optum logo. The page title is "Electronic Payments and Statements". The user is logged in as "Mary Smith" with a "Not You?" link. A navigation bar includes "Home", "View Payments", "Search Remittance", "Payer PRAs", "Maintain Enrollment" (highlighted), "Manage Users", and "My Profile". Below the navigation bar, the "Edit Enrollment" section is active, with "Continue", "Cancel", and "Finish" buttons. A table header shows "Organization", "Payer(s)", "Bank Accounts", "NPI", and "NPI Bank Account". A red message states: "To update NPI information, please call 1-877-620-6194." Below this, three input fields are shown, each containing a National Provider Identifier: "1242354345", "1321435782", and "2343564768". At the bottom, a note says "Please refer to the Manage Users tab to view or edit users." and there are "Continue", "Cancel", and "Finish" buttons.

## NPI Bank Accounts Tab

- To update EPS payments at the National Provider Identifier (NPI) level to separate NPI Bank accounts, from the 'Resources' menu, select 'Contact Us' for EPS Support information
- Note: Changes to NPI information must be submitted in writing
- Click **Cancel** to cancel changes or **Finish** to finish changes

The screenshot shows the Optum web interface. At the top left is the Optum logo. The page title is "Electronic Payments and Statements". The user is logged in as "Mary Smith" with a "Not You?" link. A navigation bar includes "Home", "View Payments", "Search Remittance", "Payer PRAs", "Maintain Enrollment" (highlighted), "Manage Users", and "My Profile". Below the navigation bar, the "Edit Enrollment" section is active, with "Cancel" and "Finish" buttons. A table header shows "Organization", "Payer(s)", "Bank Accounts", "NPI", and "NPI Bank Account". A red message states: "To update NPI Bank Accounts information, please call 1-877-620-6194." Below this, a message says: "No NPI Bank Accounts have been added to this enrollment." At the bottom, there are "Cancel" and "Finish" buttons.

## Review Edits to Organization Information

After selecting Finish on any of the previous pages, you will be returned to the Organization Information page

- If more changes are necessary, select **Edit**
- If information is correct, select **Submit**

- Click **Cancel** to exit Maintain Enrollment without saving any changes

The screenshot shows the Optum website interface. At the top left is the Optum logo. The page title is "Electronic Payments and Statements". On the right, it says "Welcome, Mary Smith" with a link for "Not You?". Below this are links for "Resources" and "Logout". A navigation bar contains tabs: "Home", "View Payments", "Search Remittance", "Payer PRAs", "Maintain Enrollment" (which is highlighted), "Manage Users", and "My Profile".

The main content area is titled "Online Enrollment Form: Verification" and includes the instruction: "Please verify the information below and submit." Below this is a section for "Organization Information" with the following details:

ABC Provider Group 123 Main Street Anywhere, ST 12345	TIN: 840611484
Market Type: Behavioral Health Dental Medical	

Below the organization information is a section for "Payer Information" which is currently collapsed. At the bottom of the form are three buttons: "Edit", "Cancel", and "Submit".

## Print Enrollment Form

- Select **Print Enrollment Form**

The screenshot shows the Optum website interface after successful enrollment. The navigation bar is the same as in the previous screenshot. The main content area is titled "Online Enrollment Form: Enrollment Completed Successfully".

Text on the page includes:

Thank you!  
You have successfully completed the enrollment application for EPS. If you would like an electronic copy of this application please select the "Print Enrollment Form" button **now** to print or save a copy.

At this time you may print your updates.

\*Note: If this was a reactivation of a previously inactive TIN and you would like to view the existing NPI information please click on the 'Maintain Enrollment' tab above. If this is a new enrollment and you would like to add NPI information please contact the EPS Support Center at 877-820-6194 prompt 1.

\*\*Note: To reprint an enrollment form, please select the TIN and then select the Edit option. Then select Finish and then Submit, even if no changes were made. At that time a "Print Enrollment Form" button will appear on the following screen.

If your enrollment or account maintenance is complete please proceed to the Home Page.

Buttons on the page include "Print Enrollment Form" and "Return to Home Page".

Additional instructions: "In order to print the EPS Enrollment Form, you must have AdobeReader installed on your computer." and "Please download [Adobe Reader](#) if it is not installed on your machine." A small Adobe Reader logo is visible in the bottom right corner.

# Manage Users

- From the EPS Welcome Page, select the Manage Users tab

- You can add, edit or delete users from your Organization for EPS Optum portal access

**Note:** This tab will only appear for Administrator access. Tab will not display for General users.

The screenshot displays the Optum Electronic Payments and Statements (EPS) interface. At the top left is the Optum logo. The main header reads "Electronic Payments and Statements". On the right, it says "Welcome, Mary Smith" with a "Not You?" link, and "Resources | Logout" below it. A navigation bar contains several tabs: "Home", "View Payments", "Search Remittance", "Payer PRAS", "Maintain Enrollment", "Manage Users" (circled in red), and "My Profile". Below the navigation bar, the "Welcome Screen" is visible, featuring a "TIN: 900000010 - Enrolled" dropdown menu. The main content area lists benefits of EPS, such as eliminating paper checks and receiving electronic remittance advices. A "News" section is also present but currently empty.

## View and Edit User

- The Manage Users feature allows the Administrator to view, add or delete their Organization's users for EPS Optum access.
- Selection of an individual from the User List populates the user's information within the data fields and the TIN grid below.
- Users active for EPS Optum portal access display under the User List.
- Administrator is able to view which TIN's the user is associated to, the user's access level (whether Administrator or General) and if they receive email notifications (for the TIN or specific TIN/NPI).

**Manage Users**

Welcome to Manage Users. As an Administrator for your organization, you have the ability to add, delete or edit user access for others in your organization that access Electronic Payment and Statements. When adding or editing a user, please select the appropriate access level for each user. In addition, Administrators also have the ability to assign General user access to specific TINs and email notification for NPIs associated with your organization TIN.

**User List**

- Gupt, AshantPr A
- Gupta1, Prashant K
- Gupta321, Prashant123 K
- Jacky, Kristen
- Last Change1, First Change M
- Masek, kevin
- Middleton, Jo
- Payables, UHG k
- Rani, Sandhya V

**Add User Form:**

- \* Required Field
- \* First Name: AshantPr
- \* Last Name: Gupt
- Middle Initial: A
- \* Phone Number: 111-064-3687 Ext: 911111
- \* Email Address: prashant\_gu1@uhc.com
- \* Retype Email Address: prashant\_gu1@uhc.com
- \* User Type: Provider
- \* Add TIN: Select TIN | Add TIN/NPI

TIN	Provider Name	TIN Access Level	NPI	NPI Name	Email Notification	Remove TIN/NPI
410834920	Organ UHC5	General	1487623674	National UHC5	<input type="checkbox"/>	<input type="checkbox"/>
900000047	asdf	Administrator			<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Add User

- Selection of the Add User button, allows the Administrator to add a new user to their Organization.
- Upon entry of all required data and selection of Save, pre-registration materials will be triggered for the newly added user.
- A unique User Name will be created and emailed along with the pre-registration url for self-service registration to the EPS Optum portal.
- Upon the new user successfully completing their registration process, their name will then appear as an active user on the User List within the Manage Users tab.

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Electronic Payments and Statements [Resources](#) | [Logout](#)

Home View Payments Search Remittance Payer PRAs Maintain Enrollment **Manage Users** My Profile

**Add User**

\* Required Field

\* First Name:

\* Last Name:

Middle Initial:

\* Phone Number: -- Ext:

\* Email Address:

\* Retype Email Address:

\* User Type:

\* Add TIN:

TIN▲	Provider Name	TIN Access Level	NPI	NPI Name	Email Notification	Remove TIN/NPI

# My Profile

- From the EPS Welcome Page, select the My Profile tab
- You can manage your own EPS Optum portal profile information.

The screenshot shows the Optum portal interface. At the top left is the Optum logo. The main header reads "Electronic Payments and Statements". On the right, it says "Welcome, Mary Smith" with a "Not You?" link, and "Resources | Logout" below it. A navigation bar contains several tabs: "Home", "View Payments", "Search Remittance", "Payer PRA S", "Maintain Enrollment", "Manage Users", and "My Profile". The "My Profile" tab is highlighted with a red circle. Below the navigation bar, the page content includes a "Welcome Screen" section with a "TIN: 900000010 - Enrolled" dropdown menu. A heading "Electronic Payments and Statements (EPS) gives your organization the freedom to:" is followed by three bullet points: "Eliminate paper checks and receive electronic claims payments.", "Receive electronic remittance advices.", and "Reconcile your claims quickly and more efficiently." Below this is a "News" section with an empty content area.

## My Profile View and Edit

- View your personal information and make any updates, as necessary.
- View all the TINs you are associated with, your access level for each of these TINs and whether or not you are enabled for email notifications.
- Change your password.
- Change your security questions.



Welcome, Mary Smith [Not You?](#)

[Resources](#) | [Logout](#)

### Electronic Payments and Statements

Home
View Payments
Search Remittance
Payer PRAs
Maintain Enrollment
Manage Users
My Profile

Save
Cancel

**My Profile**

\* Required Field

User Name: asdf

Password: [Change Password](#)

Security Questions: [Manage Security Questions](#)

\* First Name:

\* Last Name:

Middle Initial:

\* Phone Number:  -  -  Ext.

\* Email Address:

\* Retype Email Address:

User Type: Provider

TIN ▲	Provider Name	TIN Access Level	NPI	NPI Name	Email Notifications
410834920	Organ UHC5	G	1487623674	National UHC5	<input checked="" type="checkbox"/>
410834920	Organ UHC5	G			<input checked="" type="checkbox"/>
410834920	Organ UHC5	G			<input checked="" type="checkbox"/>
900000047	asdf	A			<input checked="" type="checkbox"/>

## Change Password

- Follow password guidelines to change your password.
- Upon saving your new password, an email will be sent confirming your change.



Electronic Payments and Statements

Welcome, Mary Smith [Not You?](#)  
[Resources](#) | [Logout](#)

[Home](#) | [View Payments](#) | [Search Remittance](#) | [Payer PRAs](#) | [Maintain Enrollment](#) | [Manage Users](#) | **[My Profile](#)**

### Change Password

Current Password:

New Password:

Re-type New Password:

#### Password Guidelines

Passwords must:

- be between 8 and 25 characters
- include at least one upper-case character, one lower-case character and one number
- be case-sensitive
- not contain your username
- not be same as any of the last 10 passwords

## View and Edit Security Questions

- Modify one or more of your security questions and answers.



Welcome, Mary Smith [Not You?](#)

Electronic Payments and Statements [Resources](#) | [Logout](#)

Home | View Payments | Search Remittance | Payer PRAs | Maintain Enrollment | Manage Users | **My Profile**

### Manage Security Questions

Below are your current Security Questions and Answers

\* Required Field

* Security Question 1	Select Security Question
* Security Answer 1	<input type="text"/>
* Security Question 2	Select Security Question
* Security Answer 2	<input type="text"/>
* Security Question 3	Select Security Question
* Security Answer 3	<input type="text"/>
* Security Question 4	Select Security Question
* Security Answer 4	<input type="text"/>
* Security Question 5	Select Security Question
* Security Answer 5	<input type="text"/>