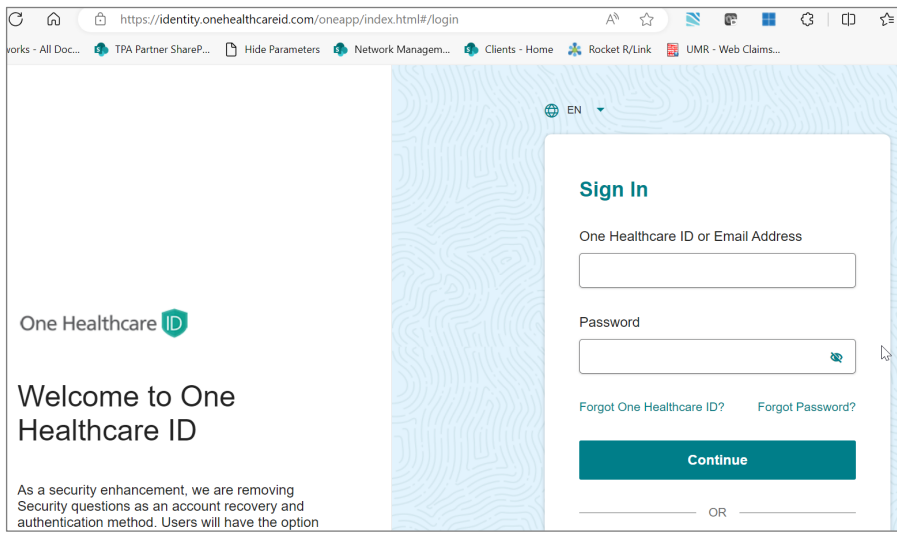


Submit claims using Optum iEDI

To submit claims online, sign into the provider portal. Submitting claims online only bypasses the need to submit by mail, fax or email for reimbursement. There is no cost to use this tool.

Sign in with your One Healthcare ID or email address and password. If this is your first time visiting, follow the prompts to create a One Healthcare ID.



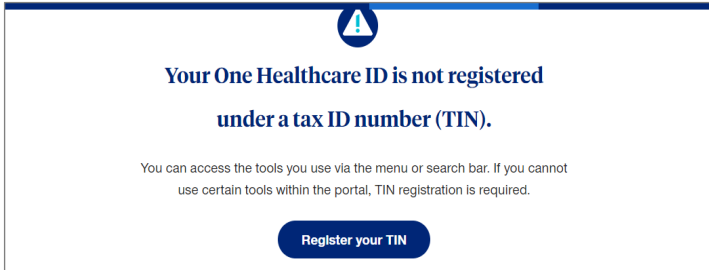
To access the claims data entry portal, select **Claim submission** from the **Claims** drop down menu.

This will take you to multiple options. For data entry using Optum iEDI, select **Online claims submission**. If you are not registered, [register now](#).

Register with Optum iEDI

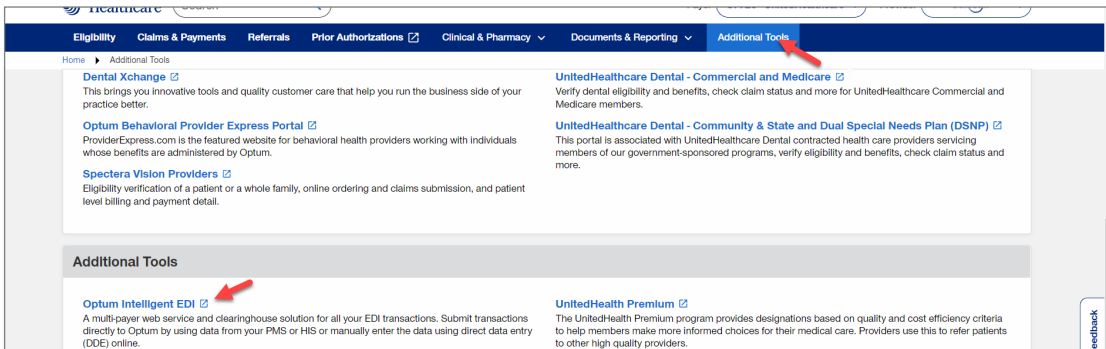
Select **Registration** and sign into the [secure provider portal](#).

Once signed in, you may see the screen below.

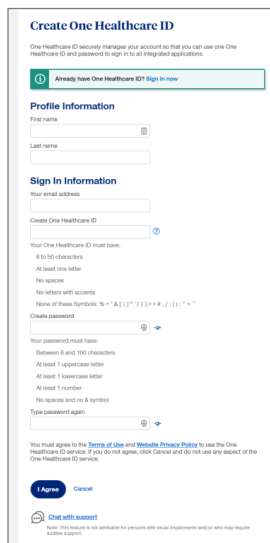


If you see this screen, your One Healthcare ID is not registered with UnitedHealthcare. You will need to register to access the Optum iEDI portal.

Select **Additional Tools** at the top of the page, then scroll down to select **Optum Intelligent EDI**, as shown below.



Next, complete the following screen and select **I agree**.

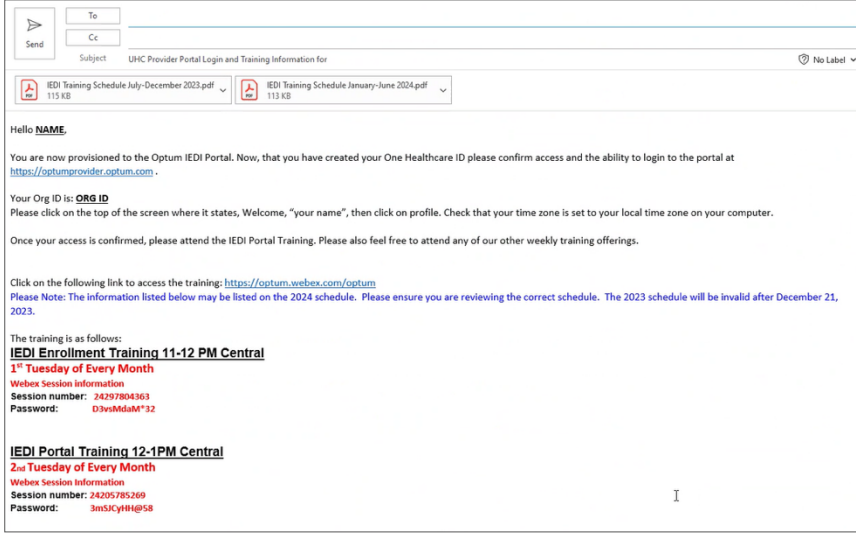


A registration form titled "Create One Healthcare ID". It includes a checkbox for "Already have One Healthcare ID? Sign in now". The form is divided into "Profile Information" (First name, Last name) and "Sign In Information" (Your email address, Create One Healthcare ID, Your One Healthcare ID must meet: 6 to 50 characters, At least one letter, No spaces, No letters with accents, None of these Symbols: % * ^ & [] { } ~ > # _ : | ! " ' ~ ~ ~, Create password, Your password must meet: Between 8 and 100 characters, At least 1 uppercase letter, At least 1 lowercase letter, At least 1 number, No spaces and no & symbol, Type password again). At the bottom, there is an "I Agree" button and a "Cancel" button. A small "Chat with support" icon is also present.

Once you have submitted a valid One Healthcare ID recognized by Optum, the following request form will display. Complete this form, select the **acknowledgement checkbox**, then **Submit**.

An eform will be sent to Optum requesting a new account. Once your account is set up, you won't see this form again. Once the account is created, you will have access to submit claims to valid payer IDs.

The creation of your account can take up to 72 hours, but is often completed within a few hours. Once you are registered, you will receive an email with your new ORG ID and files containing training dates and instructions. An example is shown below.



You can also access other training from the Optum site. For more information, see **Accessing other training on the Optum Intelligent EDI portal** in this guide.

Submit claims through the portal

As soon as you receive notice of your approved access, you can begin submitting manual claims. This is done from the provider portal by selecting the claims submission option, **Sign in now**.

After selecting **Submit Claims**, you will be directed to <https://optumprovider.optum.com>

Submit a new professional claim

The **New Professional Claim** feature allows you to initiate a new claim and save your entries as a partially completed claim. You can search for claims in a Saved status to return and finalize these claims for submission. **Claim History** tracks all changes and updates to unsubmitted and submitted claims.

For professional submissions, select **New Professional Claim** from the main menu and complete as if it were a regular claim.

The screenshot shows the Optum Intelligent EDI portal interface. The 'Claims' menu is expanded, highlighting 'New Professional Claim'. Below the menu, there are search filters for 'Date Range' (Last 7 Days) and a date range of 12/12/2023 - 12/19/2023. A table displays claim statistics:

	Claim Count	Claim Percentage	Total Charges
Accepted	46	62%	\$35,071.00
Rejected	28	38%	\$28,980.00

From the professional claim form, you can select **View Claim History**, which reflects timestamp, user name, previous claim status and status when saved.

The electronic claim form is segmented into boxes containing related fields.

The screenshot shows the 'New Professional Claim' form. It is segmented into sections:

- Claim Record #**: Includes fields for Optum ECT #, Patient Name (Account #), Uploaded Claim ID (REF D9), Insured Name (ID), Payer Trace # (REF 1K), Billing Provider (NPI), Payer Name (ID); Order, Charges, Entered By, and Last Edited By.
- Payer Information**: Includes a sub-section for **Primary Payer Information** with fields for Payer Name, Payer ID, Address Line 1, Qualifier, Other ID #, and Address Line 2.

The first box is **Claim Record #**, which contains header information and identifies the current status of the claim. This box is auto-filled when you complete and save the claim form.

Begin by selecting a **Payer Name** or **ID** in the required field of the payer information box, then complete at least the required fields in the claim form.

Note: The form fields in the claim form are generally aligned with the paper form, but certain additional information is required for electronic submission.

Name fields provide a drop down with an autocomplete search, e.g., Payer Name or ID. For patients and insureds, use the **Last Name** field to take advantage of the auto-complete feature.

You may use the floating **Save Progress** button at any time to capture your progress, as you work to complete the form.

Procedure lines can be added or removed and the numbering sequence auto-adjusts accordingly. You can expand or collapse individual procedures lines or all of the procedure lines.

You must complete at least the required fields to build a claim that can pass both the minimal validation and the situational validation screens applied by Intelligent EDI for all claims.

- Minimal validation: Required fields are marked with an asterisk and highlighted.
- Situational validation: Non-required fields become required if you populate a related non-required field (these are not marked with an asterisk). That is, if you populate a single non-required field within a set of information, then all fields in that group become required. For example, if you enter a last name in a non-required field, the first name field is triggered to become a required field to complete the set of information related to that particular situation.

Professional Claim

* Required

Expand All Collapse All Claim Notes History

Review the form and correct highlighted fields. You may also click on the links below to directly edit that field.

- Field 1a: Payer ID is required.
- Field 1b: Payer Name is required.
- Field 1k: Filing Indicator is required.
- Field 4a: Patient Last Name is required.
- Field 4b: Patient First Name is required.
- Field 5a: Patient Birth Date is required.

If configured validation rules are currently applicable to your claim, the following may occur, based on the rule type.

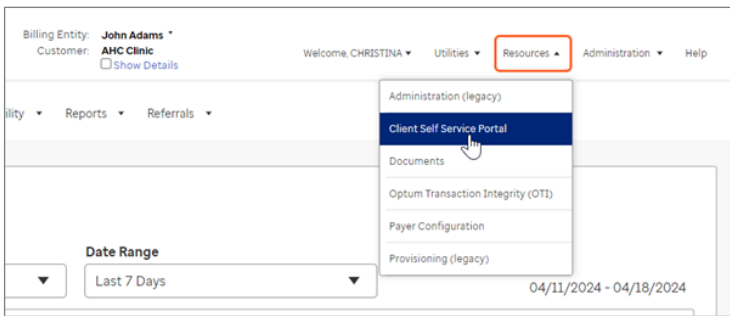
- For a data manipulation rule: Field values may be changed or removed by the system.
- For a hard stop edit rule: An error message displays with message identifiers and the claim can be submitted only after the indicated changes are made to the claim. Note that this revised claim is again subject to any other validation rules.

- For an overridable edit rule: An error message displays with message identifiers, but the claim can be submitted by selecting the **Bypass Overridable Edits** and **Submit** button (no change is required). This action does not preclude any other validation rules.

Select **Save Progress** at any time to check for error messages. Error alerts are highlighted in red and identify the related field or box by number. You can select any such field link error message to navigate to that particular field where the error message is displayed again for convenience. Once selected, the error message is no longer bolded. Note that this field link is not applicable for hard stop and overridable error messages, which are preceded by a code such as “H” rather than a field or box number.

Once you save the claim, the **Delete** option is enabled on the floating tool bar. You may delete an unsubmitted claim by selecting **Delete**, then **Yes** in response to the confirmation request. If you want to revert the deletion, select **Save Progress** to return the claim to a saved status.

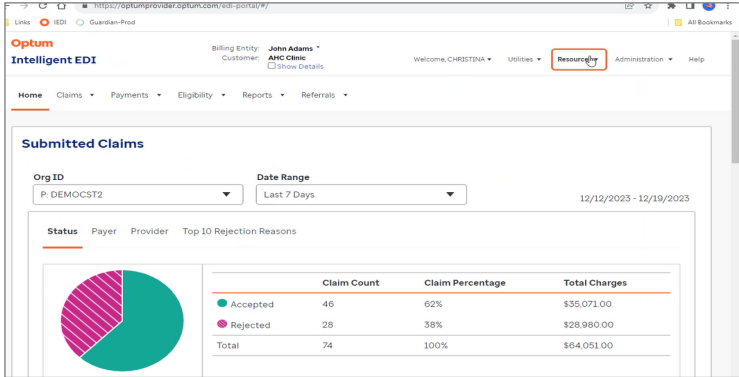
If there are any other issues or someone advises to open an Optum ticket, this will bring up an eform to complete with Optum and they will respond.



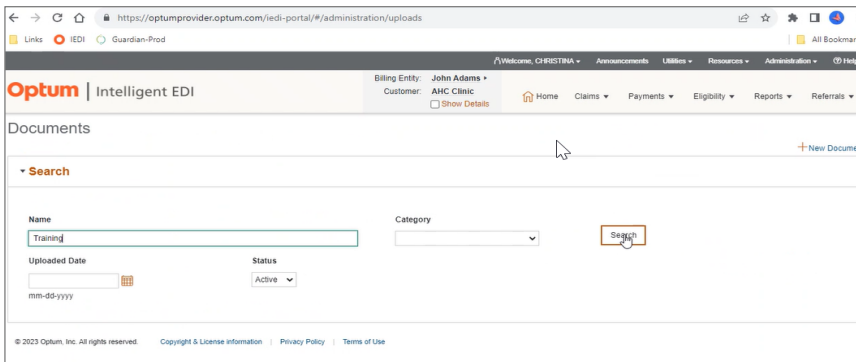
If you need to contact an agent for help, the Optum help number is **866-678-8646**.

Access other training on the Optum Intelligent iEDI portal

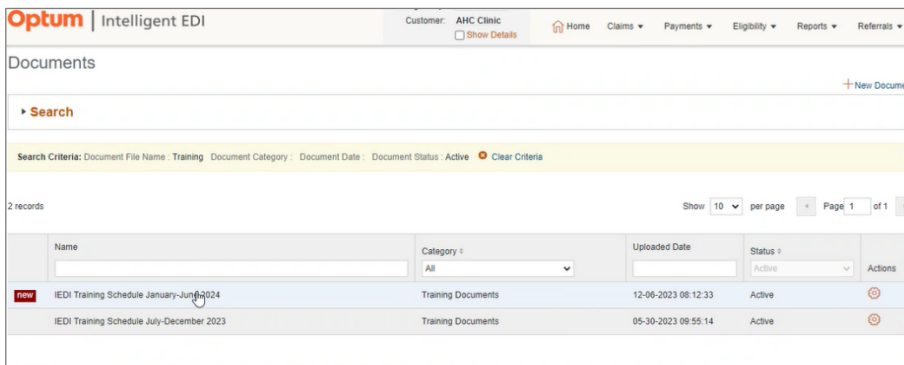
If you would like to access the training schedule for Optum, other than the training scheduled for you, you can access it from the main page by selecting **Resources**, then **Documents**.



Once in the **Documents** section, search for **Training**.



This will bring up the training schedules. Select **Action** on the right side of the screen.



You can then download any of the listed training schedules.

Click on this link to access the training: <https://optum.webex.com/optum>

Copy and Paste the meeting number and password for the meeting you wish to join. (Please note: the Session Number and Password will be the same for each month.)

EDI Enrollment Training 11-12 PM Central

1st Tuesday of Every Month

Tuesday, January 2, 2024, 11:00 AM Central

Tuesday, February 6, 2024, 11:00 AM Central

Tuesday, March 5, 2024, 11:00 AM Central

Tuesday, April 2, 2024, 11:00 AM Central

Tuesday, May 7, 2024, 11:00 AM Central

Tuesday, June 4, 2024, 11:00 AM Central

Session number: 2429 780 4363

Password: D3vsMdaM*32