OPTUM Training Session

virtual visits: Provider Portal Training Guide
Provider Portal Overview

Today’s Training

- The virtual visits provider portal is where providers in the Optum network will sign in to schedule, manage, and conduct telemental health appointments.
- Today we will go over the provider onboarding process and the main features of the virtual visits Provider Portal.
- As a prerequisite to this training, please review the Provider Portal Training Guide to become familiar with the content we will cover.
Agenda

- Onboarding
- Dashboard
- New Appointment
- Patient Files
- Reports
- Patients
- Payments
- Settings
Onboarding

In this section, providers can:

● Sign up for virtual visits and begin the onboarding process
Onboarding

In this section, providers can:

● Read through an overview of the registration process
● Prepare their information (e.g., TIN, license #s) for a faster process

Registration Overview

Register With Virtual Visits

Welcome to the Optum Virtual Visits provider portal. We appreciate your choice to join our telehealth community and will devote our full energy to helping you provide the highest quality care and experience to your patients. We know the registration process may seem overwhelming, but no worries - we’ll try to make it as painless as possible. However, we do need to collect some information first in the following few pages, so that you will be all set up to conduct your appointment the next time you log in.

The entire process will take 10 to 15 minutes. To speed things up, here's what you will need:

- Your contact information including name and practice address.
- Your practice licensure information, TIN, SSN, and NP.
- Your prescribing licensure information (and a credit card to sign up for e-prescriptions service if you choose).
- A profile picture and biography that you'd like to show patients.
- Your weekly availability schedule.
- Your appointment preferences and no-show fee.
- Your banking information to sign up for secure and fast direct deposits.

After the email verification, you may return to a previous step to make any edits and continue forward by clicking the 'Submit' button.

Take our proverbial hand and we'll walk you through the entire process. Your virtual practice is only a few pages away.

Let's Begin

Confidential property of Optum. Do not distribute or reproduce without express permission from Optum.
Onboarding

In this section, providers can:

- Review the confidentiality agreement prior to registration

Confidentiality

Confidentiality

Introduction

We recognize the privacy of your personal information is important. The purpose of this policy is to let you know how we handle the information collected through the use of this website. Portions of this website may describe privacy practices applicable to specific types of information or to information provided on specific web pages.

This policy does not apply to information collected through other means such as by telephone or in person, although that information may be protected by other privacy policies. As used in this policy, terms such as “we” or “our” and “Company” refer to Optum and its current and future affiliated entities, including our parent company UnitedHealth Group.

This website is intended for a United States audience. Any information you provide, including any personal information, will be transferred to and processed by a computer server located within the United States.

Cookies And Tracking

The Company uses various technologies, which may include “cookie” technology, to gather information from our website visitors such as pages visited and how often they are visited, and to enable certain features on this website. “Cookies” are small text files that may be placed on your computer when you visit a website or click on a URL. Cookies may include “single-session cookies” which generally record information during only a single visit to a website and then are erased, and “persistent” cookies, which are generally stored on a computer unless or until they are deleted or are set to expire.

You may disable cookies and similar items by adjusting your browser preferences at any time; however, this may limit your ability to take advantage of all the features on this website. You may also manage the use of “Flash” technologies, with the Flash management tools available at Adobe’s website. Note

Social Security Number Protection Policy

Protecting personal information is important to Optum. It is our policy to protect the confidentiality of Social Security numbers (“SSNs”) that we receive or collect in the course of business. We secure the confidentiality of SSNs through various means, including physical, technical, and administrative safeguards that are designed to protect against unauthorized access. It is our policy to limit access to SSNs to that which is lawful, and to prohibit unlawful disclosure of SSNs.
In this section, providers can:

- Create an account by entering their full name and email address and creating a password.
Onboarding

In this section, providers can:

- Verify their email address

Verify Email

Verification link sent - please check your email

Sometimes it can take a couple of minutes for the verification email to show up. If you don’t see it, try refreshing your inbox.
Onboarding

In this section, providers can:

- Verify their email address
Onboarding

In this section, providers can:

- Verify their email address

Verify Email

Your email has been successfully verified!

Get Started
In this section, providers can:

- Enter demographic information for their account including their birthday, gender, address, and phone number.
Onboarding

In this section, providers can:

- Enter their Practice information including license information by state, their NPI number, and malpractice insurance information.
Onboarding

In this section, providers can:

- Enter prescribing license information
- Enroll in the optional e-prescriptions service and enter payment information to set up recurring payments
- Skip this step for now and subscribe at a later time in the Settings section
Onboarding

In this section, providers can:

- Create a biography with their educational background and any additional credentials or information they would like to include. This biography will be visible to members.
- Upload a profile picture.
Onboarding

In this section, providers can:

● Create a weekly availability schedule using the calendar tool. This schedule will be used as the provider’s default availability when booking future appointments.
Onboarding

In this section, providers can:

- Create the types of appointments they offer patients along with their duration in minutes
- Determine any no show fees they would like to be displayed to patients

Note: Providers are responsible for billing and enforcing these fees.
Onboarding

In this section, providers can:

- Set up direct deposit information for monthly payments via Stripe
- Store their credit card information on Stripe for regular service charges e.g., e-prescribing subscription and transaction fees
Onboarding

In this section, providers can:

- Set up direct deposit information for monthly payments via Stripe
- Store their credit card information on Stripe for regular service charges e.g., e-prescribing subscription and transaction fees
Onboarding

In this section, providers can:

- Once their Stripe account has been set up, they will be redirected to this page to complete the registration process.
- They will now go through a simple tech verification process to make sure they’re ready for virtual visits.

Billing & Payments

You're ready to get paid!
Set Up My Technology

Confidential property of Optum. Do not distribute or reproduce without express permission from Optum.
Onboarding

In this section, providers can:

- Verify their technology setup meets the requirements to conduct virtual visits

Tech Verification

Verify Technology Requirements

Let’s confirm your technology settings are right for a successful appointment.

Start
Onboarding

In this section, providers can:

- Verify their technology setup meets the requirements to conduct virtual visits

Tech Verification

Image of the Adjust Video and Sound Settings page: This page shows a webcam and microphone settings. The webcam setting is the FaceTime HD Camera (5Sec:6630) with options to adjust it. The microphone setting is set to Default, with a note to speak into the microphone if it is not detected. There are buttons to start, check devices, choose plugin, check bandwidth, and finish.
Onboarding

In this section, providers can:

● Verify their technology setup meets the requirements to conduct virtual visits

Tech Verification

Choose Plugin

Check your default video option Omega below. If it doesn’t work, you can try Tango as a backup option.

Omega

Tango

Click here to try Tango

Continue with Omega

Use Tango Backup

1. Start
2. Check Devices
3. Choose Plugin
4. Check Bandwidth
5. Finish
Onboarding

In this section, providers can:

- Verify their technology setup meets the requirements to conduct virtual visits
Onboarding

In this section, providers can:

- Verify their technology setup meets the requirements to conduct virtual visits
Onboarding

In this section, providers can:

- Verify their technology setup meets the requirements to conduct virtual visits

Tech Verification

You’re finished!

You are good to go.

Complete
Agenda

1. Onboarding
2. Dashboard
3. New Appointment
4. Patient Files
5. Reports
6. Patients
7. Payments
8. Settings
Dashboard

In this section, providers can:

● View and search through all previous and upcoming appointments
● Start, Reschedule, or Cancel an appointment
● View appointment reports
● View payment status of an appointment
● View note status of an appointment
Dashboard

In this section, providers can:

- Start video chat appointments with their patients
- View patient information, past notes, files, and prescriptions
- Add new notes, new files, and create new prescriptions (if eligible)
- Check and verify audio and video access
Dashboard

In this section providers can:

- View patient information including DOB, address, Gender, Email, etc.
- View the reason for appointment if provided
In this section, providers can:

- Select a Note Template from the list available and document notes while they are seeing a patient
- To properly save a note, a provider must enter in a billing code and a diagnosis code
Dashboard

In this section, providers can:

- View the past notes that they have written for a patient sorted by date

Past Notes
Dashboard

In this section, providers can:

- View files for this patient. Examples of relevant files include notes on the patient written by previous providers, lab reports, etc.
- Download any of these files
Dashboard

In this section, providers can:

- View existing prescriptions
- Create new prescriptions
- Launch the eRx tool to prescribe medication online
- In order to use the eRx tool, providers must be enrolled in the Rcopia e-prescription service

Prescriptions

Appointment: Thursday, 12/21/2017 09:00 AM - 09:50 AM

You might be a little early, but that’s ok. Just hit ‘Start’ and wait for the other side to do the same.

Start Appointment
In this section, providers can:

- View troubleshooting guide to help ensure they have the correct setup.
- Run a bandwidth test
- Ensure speeds of at least 3 Mbps upload and 3 Mbps download
- Check Microphone, Webcam and Audio settings
Dashboard

After a provider completes an appointment:

- They will be prompted to complete a short and optional survey
- Providers can choose to opt-out if they wish
- Providers can also reconnect to the appointment by clicking “Reconnect”
Agenda

- Onboarding
- Dashboard
- New Appointment
- Patient Files
- Reports
- Patients
- Payments
- Settings
New Appointment

In this section, providers can:

- Schedule a new appointment
- The first section allows them to select an appointment type which includes the duration and any associated no-show or late cancellation fees

Appointment Type

Select Appointment Type

Please select your appointment from the types offered below and note the fee that you will be billed by the provider in the event of no show or late cancellation (less than 24 hours in advance):

<table>
<thead>
<tr>
<th>Description</th>
<th>Duration</th>
<th>No show fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Psychiatry Evaluation</td>
<td>50 minutes</td>
<td>$50.00</td>
</tr>
<tr>
<td>Initial (non-MD) Evaluation</td>
<td>20 minutes</td>
<td>$10.00</td>
</tr>
<tr>
<td>Psychiatry Evaluation</td>
<td>90 minutes</td>
<td>$50.00</td>
</tr>
<tr>
<td>Create my own</td>
<td>15 minutes</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
**New Appointment**

In this section, providers can:

- Schedule a new appointment
- This screen allows them to select a date and time for the appointment
- The available dates and times are based on the provider’s availability schedules
New Appointment

In this section, providers can:

- Schedule a new appointment
- This screen allows them to select the patient they would like to schedule an appointment with
- Providers can only view patients they have scheduled appointments with before
New Appointment

In this section, providers can:

- Confirm the appointment details and make changes if necessary
- If the details are correct, the provider will click “book appointment”
- A confirmation email will be sent to both the provider and the patient
Agenda

Onboarding

Dashboard

New Appointment

Patient Files

Reports

Patients

Payments

Settings
Patient Files

In this section, providers can:

- View all patient files
- Upload new patient files
- Search through patient files easily
Patient Files

In this section, providers can:

- View and upload standard forms available for their patients to download and complete
- Download or delete previously loaded common forms
- Upload a new standard form
Agenda

- Onboarding
- Dashboard
- New Appointment
- Patient Files
- Reports
- Patients
- Payments
- Settings
Reports

In this section, providers can:

- View a complete list of reports that are generated for each appointment scheduled or completed
- Cancel upcoming appointments
- Edit note
- View detailed reports
Agenda

- Onboarding
- Dashboard
- New Appointment
- Patient Files
- Reports
- Patients
- Payments
- Settings
Patients

In this section, providers can:

- View a complete list of their patients
- View a detailed summary of the patients' information and appointment history
- Launch eRx to view or manage prescriptions for the patient
Payments

In this section, providers can:

- View a summary of their appointments and payment data
- View a comparative analysis of their appointments and revenue month over month to track progress
Payments

In this section, providers can:

- View a table of monthly payment reports
- View a deposit breakdown for each appointment completed as well as any transaction fees incurred within the month selected
**Settings**

In this section, providers can:

- Modify basic demographic information such as their Birthday, Address, Phone number, email etc.
Settings

In this section, providers can:

- Modify or update practice information including license information, state licenses, NPI number, and malpractice insurance information
Settings

In this section, providers can:

● Manage or cancel their subscription to Rcopia’s e-prescriptions service and view stored payment information

● If they chose not to opt-in during the onboarding process, they can subscribe here at any time
In this section, providers can:

- View payment information including direct deposit information and the credit card stored on file
- To update this info, they have to update directly in Stripe
Settings

In this section, providers can:

- Update their biography and profile picture
- Add additional degrees to their education credentials by adding more rows
Settings

In this section, providers can:

- Change or add appointment types and durations
- Manage the optional no-show and cancellation fees
- Providers will be responsible for billing patients any no-show or cancellation fees
Settings

In this section, providers can:

- Manage which notifications they receive via email and which notifications they will receive within the portal.
In this section, providers can:

- Add new case note templates to use during appointments
- Once a new template is loaded here, it will show in the list of note templates available when a provider selects the “note” tab in the appointment chat page
Settings

In this section, providers can:

- View and update any existing availability schedules
- Create new schedules to reflect the provider’s future availability
Settings

In this section, providers can:

- View and update any existing availability schedules
- Create new schedules to reflect the provider’s future availability
Questions?
Thank you.