



# Optum SLCo Biller Training

July 11, 2019

**Optum Salt Lake County**

# Overview

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- Roster Management
- Client Search
- Clients with Multiple Medicaid IDs
- Client Admission - Special characters
- Fund Source description change
- Billing reports in Pconn
  - ✓ Audit Log Report
  - ✓ Authorization Request Status
  - ✓ Provider Billing Report

# Roster Management

- It is the responsibility of the provider to submit roster updates as soon as possible upon any change in providers. Utah Medicaid requires that all providers **MUST** be actively registered with their office to treat any Medicaid client.

If your agency is contracted under supervisory protocol, you must submit a roster update and a supervisory protocol list. The following guidelines are required when submitting supervisory protocol:

1. Clinicians who are working to obtain their license need to be added in supervisory protocol. Once they've obtained their license, the provider can begin the credentialing process with Optum. Until the process is complete, the provider must remain in supervisory protocol until they're fully licensed and fully credentialed by Optum.
2. New hires that are licensed need to be added to the supervisory protocol until they're fully credentialed by Optum.
3. Providers are responsible for notifying Optum SLCO of **all** performing provider changes, including Medicaid registration changes, employment termination, etc. in a timely manner.
4. Changes should be made using one of the following forms:
  - Roster Update – Blank.xlsx
  - Supervisory\_Protocol\_worksheet.xlsx



# Client Search

- When searching for a client using the 'Add New Client/Client Search' functionality, please search only on the client's Medicaid ID.

Search Criteria	
Social Security Number:	<input type="text"/>
Medicaid ID:	<input type="text" value="0123456789"/> ×
Last Name:	<input type="text"/>
First Name:	<input type="text"/>
Sex:	<input type="radio"/> Female - F <input type="radio"/> Male - M
Date of Birth:	<input type="text"/>

Once the Medicaid ID is entered, click the search button at the bottom of the search window.

*Please Note:*

*It is critical that no other information is entered as that may produce false results.*

# Client Admission

- Admission form no longer allows for special characters in address fields

- The following symbols should be avoided: \$ ` @ % ^ \* ~ !
- Any record created with any of these characters WILL NOT SAVE.

*Please note: The form will NOT error during entry if a special character is entered. It is the user's responsibility to ensure they are not using one of these characters.*

Back ProviderConnect - Provider Admission Form HORIZON HOME-Dummy 5/1/2019 1:06:36 AM Lookup Client Main Menu Log Out

Admission Information	
Sex <input type="checkbox"/> Female - F <input type="checkbox"/> Male - M *	
Date of Birth <input type="text"/>	Age <input type="text"/>
Admission Date <input type="text"/>	Admission Time <input type="text"/> HH:MM AM/PM
Program Outpatient	Medicaid ID 099999999
Admitting Practitioner -Please Choose One-	Attending Practitioner -Please Choose One-
Treatment Service ALL AGE GROUPS - 1	Type of Admission -Please Choose One- *
Social Security Number <input type="text"/>	
Demographics	
Client Last Name <input type="text"/>	Client Home Phone Number <input type="text"/>
Client First Name <input type="text"/>	Client Work Number <input type="text"/>
Client Address Line 1 <input type="text"/>	Client Address Line 2 <input type="text"/>
Client Address - City <input type="text"/>	Client Address - State -Please Choose One-

# Clients with multiple Medicaid IDs

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- Optum SLCO has implemented a new procedure to manage clients who are assigned multiple Medicaid ID numbers.

## For clients with higher level of care authorizations:

1. Contact your Optum SLCo Care Advocate and notify them that a new Medicaid ID has been issued.
2. Your Care Advocate will discharge the old client record and create a new client record (including a new patient ID number), authorization and Mental Health Event Record.

## For clients with outpatient level of care authorizations:

1. Create new client record in PCONN using the Add New Client/Client Search function.
2. Create discharge record for old client ID, indicating that the client was issued a new Medicaid ID. Please reference the new patient ID # so the client records can be correctly severed within Optum's system.

# Fund Source Changes

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- In an effort to reduce confusion with client eligibility, we have renamed the funding source options in ProviderConnect and all provider reporting.

## Fund Source #4

Utah Medicaid has been renamed to SLC Medicaid.

## Fund Source #5

Salt Lake County Non-Medicaid has been renamed to Non-Medicaid SLC.

*Please note:*

*All existing authorizations and reports will not be impacted by this change.*



# Provider Connect Reports

- ProviderConnect offers a suite of reports to assist in validating that records saved and adjudicated successfully.

ProviderConnect - Main Menu			HORIZON HOME-Dummy 7/10/2019 11:35:17 PM	<a href="#">Lookup Client</a>	<a href="#">Main Menu</a>	<a href="#">Log Out</a>
<b>You are logged in as:</b>	JKTEST04					
<b>Your last login was:</b>	7/10/2019 11:35:00 PM					
Main Menu - Provider						
<a href="#">Billing</a>	<a href="#">Lookup Client</a>	<a href="#">Provider</a>				
<a href="#">Reports</a>	<a href="#">Add New Client/Client Search</a>		<a href="#">Change Password</a>			
<a href="#">Documentation</a>	<a href="#">News</a>					
<a href="#">Logout / Exit</a>						
<a href="#">About ProviderConnect 2019.2.1</a>						

The following reports are available:

Reports
Audit Log Report
Authorization Request Status
Provider Billing Reports

# ProviderConnect Reports con't

- **Audit Log Report:**

The report will produce results for admissions, auths and claims, based on one or more of the selections in the popup below.

Status choices are as follows:

Audit Log Report	
Status:	--Choose One--
Agency:	HORIZON HOME-Dummy
User:	--Choose One--
Member ID:	
Record Type:	--Choose One--
Date Range:	6/10/2019 - 7/10/2019

- Choose One--
- CommunicationFailure
- Complete
- Confirmed
- Errored
- InProgress
- Pending
- Queued
- Requeue Bill

Record Type choices include a wide variety of options including: Admission, Auth Request, Bill, etc.

**Generate Report**

This report is most helpful when trying to determine why a record may not have completed successfully or may still be showing in pended status for an extended period of time.

# ProviderConnect Reports con't

- **Audit Log Report con't:**

The screenshot below is an example of a completed report with the following criteria selected:

Audit Log Report	
Status:	--Choose One--
Agency:	HORIZON HOME-Dummy
User:	--Choose One--
Member ID:	40966
Record Type:	--Choose One--
Date Range:	01/01/2019 - 7/11/2019

**Generate Report**

Audit Log Report Results				
Record Type	Status	Transaction Time	Details	Error
Bill	Complete	1/8/2019 12:20:00 PM	<b>Send Count:</b> 1 <b>Bill Enum:</b> 1820191219495 <b>Bill Date:</b> 1/8/2019 <b>Provider:</b> HORIZON HOME-Dummy <b>User:</b> JKTEST04 (Jen Kretchman)	
AuthRequest	Complete	3/5/2019 2:08:00 PM	<b>Send Count:</b> 1 <b>Auth Number:</b> 404162 <b>Provider:</b> HORIZON HOME-Dummy <b>Patient:</b> 40966 <b>User:</b> admin (Avatar User)	
MemberDemographics	Complete	4/25/2019 2:00:00 AM	<b>Send Count:</b> 2 <b>Patient:</b> 40966 <b>User:</b> JKTEST04 (Jen Kretchman)	

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# ProviderConnect Reports con't

- **Authorization Status Report:**

The report will produce results for admissions, auths and claims, based on one or more of the selections in the popup below.

Search Criteria	
Member ID:	<input type="text"/>
Last Name:	<input type="text"/>
Record Date:	<input type="text" value="6/11/2019"/> - <input type="text" value="7/11/2019"/>
Status:	-- All Statuses -- ▾

ProviderConnect allows for one or all of the fields to be selected and included in the search.

[Search by Criteria](#)

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[About ProviderConnect 2019.2.1](#)

This report is can be used to identify authorizations assigned to a specific client or directly to the provider.

# ProviderConnect Reports con't

- Authorization Status Report con't:

The screenshot below is an example of a completed report with the following criteria selected:

Search Criteria	
Member ID:	<input type="text"/>
Last Name:	<input type="text"/>
Record Date:	01/01/2019 x - 7/11/2019
Status:	-- All Statuses -- ▾

Search by Criteria

ProviderConnect - Authorization Status Report											
										Search: <input type="text"/>	
No.	Request Date / Time	Member ID	Provider	Origin	Request Status	Last Name	First Name	Begin Date	End Date	Authorization No.	User
1.	5/21/2019 11:35:01 AM	40966	HORIZON HOME-Dummy	ProviderConnect	Approved	MANN	SNOW	9/1/2015	9/30/2015	289223	admin (Avatar User)
2.	5/21/2019 11:29:47 AM	40966	HORIZON HOME-Dummy	ProviderConnect	Approved	MANN	SNOW	4/20/2017	4/29/2017	377844	admin (Avatar User)
3.	5/21/2019 11:29:24 AM	40966	HORIZON HOME-Dummy	ProviderConnect	Approved	MANN	SNOW	5/1/2017	8/23/2017	377861	admin (Avatar User)
4.	5/21/2019 11:27:13 AM	40966	HORIZON HOME-Dummy	ProviderConnect	Approved	MANN	SNOW	1/1/2019	12/31/2019	404162	admin (Avatar User)
5.	5/2/2019 8:16:49 AM	60928	HORIZON HOME-Dummy	ProviderConnect	Approved	TEST	ROSEBUD	5/2/2019	5/2/2019	407368	admin (Avatar User)
6.	5/1/2019 4:50:16 PM	60916	HORIZON HOME-Dummy	ProviderConnect	Approved	TEST	CLIENT	1/1/2019	1/30/2019	407360	admin (Avatar User)
7.	4/24/2019 2:15:21 PM	50000	HORIZON HOME-Dummy	ProviderConnect	Approved	MORCOS	NOAH	1/1/2019	12/31/2019	406305	admin (Avatar User)
8.	4/3/2019 4:55:12 PM	40914	HORIZON HOME-Dummy	ProviderConnect	Approved	TEST	Johnny	4/1/2019	4/30/2019	405594	admin (Avatar User)
9.	1/8/2019 12:09:38 PM		HORIZON HOME-Dummy	MSO	Approved			1/1/2018	6/30/2019	P170	admin (Avatar User)
10.	1/8/2019 12:06:44 PM		HORIZON HOME-Dummy	MSO	Approved			1/1/2016	12/31/2016	P149	admin (Avatar User)

Showing 1 to 10 of 10 entries

# ProviderConnect Reports con't

- **Provider Billing Report con't:**

The report will produce results for billed or unbilled service detail OR a summary for the specified date range in the popup below.

Search Criteria - Provider Detail Service	
Billed/Unbilled:	Billed <input checked="" type="radio"/> Unbilled <input type="radio"/>
Program:	All Programs ▾
Record Date Range:	<input type="text"/> - <input type="text"/>
<b>Generate Report</b>	

Search Criteria - Provider Service Summary	
Billed/Unbilled:	Billed <input checked="" type="radio"/> Unbilled <input type="radio"/>
Program:	All Programs ▾
Record Date Range:	<input type="text"/> - <input type="text"/>
<b>Generate Report</b>	

Program is not used by Optum, so this field should always be left as 'All Programs'.

# ProviderConnect Reports con't

- Provider Billing Report con't:

The screenshot below is an example of a completed Provider Service Detail report with the following criteria selected:

Search Criteria - Provider Detail Service	
Billed/Unbilled:	Billed <input type="radio"/> Unbilled <input checked="" type="radio"/>
Program:	All Programs <input type="button" value="v"/>
Record Date Range:	01/01/2019 - 07/10/2019
<input type="button" value="Generate Report"/>	

ProviderConnect - Provider Detail Service Report														
<a href="#">Back</a> <span style="float: right;"> <a href="#">HORIZON HOME-Dummy 7/11/2019 12:49:16 AM</a> <a href="#">Lookup Client</a>   <a href="#">Main Menu</a>   <a href="#">Log Out</a> </span>														
	Provider	Contracting Provider Program	Client ID	Client Name	Authorization Number	Date of Service	CPT Code	Units	Duration	Location	Clinician	Amount Billed	Expected Payment	Status
1.	HORIZON HOME-Dummy		40966	MANN, SNOW	404162	4/1/2019	Psychotherapy, Crisis (first 60min)	1	15		TEST,TEST (INACTIVE)	\$102.78	N/A	Unbilled
2.	HORIZON HOME-Dummy		40966	MANN, SNOW	404162	4/1/2019	Psychotherapy, Pt and/or family (30min)	1	60		TEST,TEST (INACTIVE)	\$51.39	N/A	Unbilled
3.	HORIZON HOME-Dummy		40966	MANN, SNOW	404162	4/1/2019	Psychotherapy, Pt and/or Family (60 min)	1	60		TEST,TEST (INACTIVE)	\$102.78	N/A	Unbilled
4.	HORIZON HOME-Dummy		40966	MANN, SNOW	404162	5/1/2019	Psychiatric Dx Eval	1	60		TEST,SNOWMAN	\$31.34	N/A	Unbilled
5.	HORIZON HOME-Dummy		60916	TEST, CLIENT	P170	5/1/2019	Psychiatric Dx Eval	1	60		TEST,TEST (INACTIVE)	\$31.34	N/A	Unbilled
6.	HORIZON HOME-Dummy		60928	TEST, ROSEBUD	407368	5/2/2019	Psychiatric Dx Eval	1	30		TEST,SNOWMAN	\$31.34	N/A	Unbilled
7.	HORIZON HOME-Dummy		60928	TEST, ROSEBUD	407368	5/2/2019	Psychiatric Dx Eval	1	20		TEST,SNOWMAN	\$31.34	N/A	Unbilled
8.	HORIZON HOME-Dummy		60928	TEST, ROSEBUD	407368	5/2/2019	Psychiatric Dx Eval w Medical Services	4	60		TEST,SNOWMAN	\$125.36	N/A	Unbilled
9.	HORIZON HOME-Dummy		60928	TEST, ROSEBUD	407368	5/2/2019	Psychotherapy, Group	1	15		TEST,SNOWMAN	\$5.98	N/A	Unbilled
10.	HORIZON HOME-Dummy		60928	TEST, ROSEBUD	407368	5/2/2019	Psychotherapy, Pt and/or Family (45 min)	2	30		TEST,SNOWMAN	\$154.16	N/A	Unbilled

# ProviderConnect Reports con't

- **Provider Billing Report con't:**

The screenshot below is an example of a completed Provider Service Summary report with the following criteria selected:

Search Criteria - Provider Service Summary	
Billed/Unbilled:	Billed <input type="radio"/> Unbilled <input checked="" type="radio"/>
Program:	All Programs <input type="button" value="v"/>
Record Date Range:	01/01/2019 - 07/10/2019 <input type="button" value="x"/>
<input type="button" value="Generate Report"/>	

	Provider	Contracting Provider Program	Service Date Range	Total Units	Total Amount Billed	Total Expected Payment
1.	HORIZON HOME-Dummy		4/1/2019 - 5/2/2019	14	\$667.81	N/A





# Questions?

Contact Optum SLCo Network

877-370-8953 prompt #5

[saltlakecounty.networkbox@optum.com](mailto:saltlakecounty.networkbox@optum.com)

**Thank you!**