Optum ERA & EOB Manual

How to Access Optum ERA & EOB Online.................................................................2
View New ERA Files..............................................................................................3
View Check Summary............................................................................................4
Download ERA Files – One by One or a Group of ERA Files..............................6
View Electronic EOB Image of the ERA...............................................................9
Search Options.....................................................................................................11
How to View ERA Filename..................................................................................12
How to Access Optum ERA & EOB Online

1. Type your Username, Password and your Organization ID.
2. Then Click “Login”.
View New ERA Files

1. After you select "Electronic Remittance Advice" tab, you will see the ERA main page which will display all new (unread ERA files).
2. If you have navigate to other sections of the ERA pages, you can return to this screen by clicking the "New ERA’s" tab.

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### Example of New ERA Files

<table>
<thead>
<tr>
<th>Check Number</th>
<th>Check Date</th>
<th>Payor</th>
<th>Plan ID</th>
<th>Check Amount</th>
<th>Timedate</th>
<th>Tax ID</th>
<th>NPI</th>
<th>Download ERA</th>
<th>View EOB</th>
<th>View Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>0881157293</td>
<td>11/29/2013</td>
<td>UMC</td>
<td></td>
<td>$95.55</td>
<td>11/29/2013</td>
<td></td>
<td></td>
<td>Download ERA</td>
<td>View EOB</td>
<td>View Summary</td>
</tr>
<tr>
<td>0891162917</td>
<td>11/29/2013</td>
<td>HCA</td>
<td></td>
<td>$88.99</td>
<td>12/10/2013</td>
<td></td>
<td></td>
<td>Download ERA</td>
<td>View EOB</td>
<td>View Summary</td>
</tr>
<tr>
<td>0891162918</td>
<td>11/29/2013</td>
<td>HCA</td>
<td></td>
<td>$88.99</td>
<td>12/10/2013</td>
<td></td>
<td></td>
<td>Download ERA</td>
<td>View EOB</td>
<td>View Summary</td>
</tr>
<tr>
<td>1091190001</td>
<td>10/24/2013</td>
<td>AH Medicaid</td>
<td></td>
<td>$144.00</td>
<td>11/29/2013</td>
<td></td>
<td></td>
<td>Download ERA</td>
<td>View EOB</td>
<td>View Summary</td>
</tr>
<tr>
<td>1234567890</td>
<td>08/12/2011</td>
<td>MTPS</td>
<td></td>
<td>$8.75</td>
<td>11/29/2013</td>
<td></td>
<td></td>
<td>Download ERA</td>
<td>View EOB</td>
<td>View Summary</td>
</tr>
</tbody>
</table>

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A check mark in the far left column will indicate whether or not the check has previously been read.
View Check Summary

There are two ways to view check summary: 1) by clicking on "Check Number"; or 2) by clicking on "View Summary".

By Clicking on “Check Number”

1. Click on Check Number to view the summary of the particular check you want to view.
2. Detailed information of the check will display on the bottom section of the page.
By Clicking on “View Summary”

1. To view the summary of the check, click on “View Summary”.

2. This will generate another pop-up window (browser) on your screen that will display payment summary information of the check you have selected. You will be able to print the summary by clicking on the “Print” button.
Download ERA Files – One by One or a Group of ERA files
You can download a particular ERA file or zip and download one or more files.

1. To download an ERA file.
   a. Click on the “Download ERA” link of the file you want to download.
      
     b. You will be prompted to select either “Open or Save”. Click “Save” to save your ERA file to your computer.

     c. They will be prompted again to select the location where you want to save the file.
d. Once you select the location where you want to save the file, click “Save”.

2. To zip and download one or more files
   a. To download ALL new ERA files, check the first box of the heading row. It will automatically check all of the new ERA files.
   
   b. To download only selected files, check the box of every row you want to download.

   c. Once you select the files that you want to download, click “Zip and Download”.
d. You will be prompted to download a zipped file, Click “Save”.

![Image of file download dialog box]

e. Then you will be prompted again to select the location where you want the file to be saved.

![Image of file save dialog box]

f. Once you select the location where you want to save the file, click “Save”.
**View Electronic EOB Image of the ERA**


1. To view the EOB file, click “View EOB”.

   ![Image of EOB file]

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

   ![Image with EOB details]

   You also can print the EOB by clicking on the print button in your toolbar.

   **Remittance Notice**

   **UHC**
   - Provider Tax ID: 123456789
   - Medicare ID: 
   - Provider NPI: Actual NPI
   - Check Amount: $ 90.55
   - Check/EFT #: 894512373
   - Check/EFT Date: 11-25-2013

   **Patient Name:** PRINCESS, CINDERELLA
   - Patient ID #: 111111111A
   - Patient Account: PT00000454
   - Payer Control #: ABC123
   - Crossover Carrier: STATE OF MEDICAID
   - Carrier ID: 07726
   - Output Alert Codes: MA01 MA15 MA07

   **Services**
   - Service Date: 11-25-2013
   - Procedure Code: 97116
   - Allowed Amount: $ 75.00
   - Deductible Amount: $ 31.99
   - Coinsurance: $ 0.00
   - Deductible: $ 31.99
   - Copay: $ 34.38
   - Group: CO
   - Carrier ID: 07726
   - MA07

   - Service Date: 11-25-2013
   - Procedure Code: 97140
   - Allowed Amount: $ 65.00
   - Deductible Amount: $ 30.15
   - Coinsurance: $ 0.00
   - Deductible: $ 30.15
   - Copay: $ 26.86
   - Group: CO
   - Carrier ID: 07726
   - MA07
3. As part of the Operating Rules for Administrative Simplification, if the CAGH, CARC and RARC combination provided on the ERA matched a Business Scenario, the appropriate Business Scenario(s) is provided on the EOB.

<table>
<thead>
<tr>
<th>Check/EFT #</th>
<th>864512737</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check/EFT Date</td>
<td>11-28-2013</td>
</tr>
</tbody>
</table>

### Service Level Group Code Glossary
- **CO**: Contractual Obligations
- **PI**: Payee Initiated Reductions
- **PR**: Patient Responsibility

### Service Level Reason Code Glossary
- **112**: Payment adjusted as not furnished directly to the patient and/or not documented
- **223**: Adjustment code for mandated federal, state or local law/regulation that is not already covered by another code and is mandated before a new code can be created
- **59**: Charges are adjusted based on multiple susceptibility
- **13**: The date of death precedes the date of service
- **45**: Charges exceed your contracted/legislated
- **2**: Co-insurance Amount

### Outpatient Remark Code Glossary
- **MA01**: If you do not agree with what we approved for these services, you may appeal our decision. To make sure that we are fair to you, we require another individual that did not process your initial claim to conduct the appeal. However, in order to be eligible for an appeal, you must write to us within 120 days of the date you received this notice, unless you have a good reason for being late.
- **MA15**: Your claim has been separated to expedite handling. You will receive a separate notice for the other services reported.
- **MA07**: The claim information has also been forwarded to Medicaid for review.

### Business Scenario Glossary
- Additional Information Required – Missing/Invalid/Incomplete Documentation
- Additional Information Required – Missing/Invalid/Incomplete Data from Submitted Claim
Search Options
There are 3 main search tabs the user can select from:

1. Date Search
2. Check Number Search
3. Patient Search

1. Date Search
   On the Date Search, the user can enter a From and To date span, or a pre-defined search of 30, 60 or 90 days. This will return all checks within the timeframe specified.

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

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

1. You can view an ERA filename that you want to download by putting your cursor over the “Download ERA” link of that file.

2. The ERA filename will be shown on the bottom of the browser.

3. ERA filename format is:
   - Payer ID + Date + Tax ID + Internal Sequent #