How to Submit an Online Notification Form

The OptumHealth Notification Form (NF) should be completed and submitted to OptumHealth as early as possible, ideally, prior to the patient's first visit at their chosen medical center. Upon receipt of this referral, OptumHealth will handle the patient set-up and notify the medical center. OptumHealth has made it easier for you to submit a notification form through our online notification form tool.

Accessing the Notification Form Tool

To access the Notification Form tool, simply enter the URL for OptumHealth Complex Medical Conditions (www.myoptumhealthcomplexmedical.com) into the address bar of your internet browser application (i.e., Internet Explorer). Upon reaching the site, enter your username & password into the fields provided. This information will be validated by security on the site. From the Welcome page, simply hold your cursor over the Manage Patients menu item and select Submit Notification on the fly-out menu.

OptumHealth Complex Medical Conditions Welcome Page

Notification Form Tool Options

When accessing the application, the first page you will see is the Notification Form Home page. From here, you can create and submit a new NF, view submitted forms, or view previously "Saved as Draft" forms. We will begin by creating a standard NF, an EZ-NF, and then walk through the "Faxed to Facility", "Your Drafts" and "All Submitted" functions.

OptumHealth Complex Medical Conditions Notification Form Home Page

Creating a New NF

There are two ways to create a new NF: the Standard NF or the EZ-NF. The Standard NF form should be used if you are familiar with our fields, and know all the information to enter in them. The EZ-NF form should be used if you are not familiar with our fields and you need help from OptumHealth staff in order to complete the form.

The Standard NF

You can access the Standard NF by clicking on "**Standard NF**", which will open the Notification Form Product Selection Page. Within this page you will see a variety of products, select the product that you would like to access by clicking on the product's name. We will walk through the Transplant Resource Services Standard NF to give a step-by-step explanation on how to complete the Standard NF form.

OptumHealth Notification Form Product Selection Page

Taking a Closer Look at the Transplant Standard Notification Form

GENERAL TAB

The Transplant Standard NF opens to the general tab as illustrated below. You can tab through every field of the form.

- Throughout the form you can click on help buttons "**?**" for more information about the field.

OptumHealth Transplant Notification Form Page – General Tab

o **Product Type:** Auto-populates based on earlier selection of product logo.

o **Program Type:** Select the transplant type applicable to your patient.

o **Extracontractual:** Choose Yes, if you are referring your patient to a medical center that is not currently in the OptumHealth Transplant Centers of Excellence network.

o **Medical Center:** Select applicable medical center out of a list of all the transplant network medical centers available. Centers will be listed with a COE or TAP designation.

o **Case Effective Date:** Choose the date that you would like the OptumHealth discount to begin.

o **Accessing Phase V:** Select Phase V if your patient would like to take advantage of our OptumHealth discounted rates for their on-going follow-up care. (length of Phase V is different for each medical center contract.)

- Once you complete one section, you can click on the tab name for the next section to complete (i.e., Client), or use the "**Next Page**" button at the bottom of the page.

NOTE: All fields **bolded** and marked with an asterisk (*) to the right of the label are required fields. The form cannot be submitted unless these fields are completed.

CLIENT TAB

The Client tab requires that you identify how the patient is accessing OptumHealth contracts.

OptumHealth Transplant Notification Form Page – Client Tab

o **Client:** This field is a drop down box that is auto-populated with the OptumHealth clients with whom you have access rights.

o **Client Facets ID:** Auto-populates based on the client selected. This field will not auto-populate until you advance to another tab. You should be able to return to the Client Tab and view the populated field.

o **Parent Group:** Auto-populates based on the client selected.

o **Site/Distributor:** This field enables you to make a note of the client's location (site) and parent group.

NOTE: **If the client drop-down box does not auto-populate with the client your patient will be using to access OptumHealth contracts, contact your Account Manager.**

PATIENT TAB

The Patient tab has several fields of information that are required fields, each is noted with an asterisk and bolded text.

OptumHealth Transplant Notification Form Page – Patient Tab

o **First Name-Middle Initial – Last Name:** The patient's name.

o **ID Number:** The number that your company uses to identify the patient.

o **Date of Birth:** The patient's birth date.

o **Gender:** Select male or female.

o **Street Address- City- State- Zip Code- Country:** The patient's address.

o **Email Address:** The patient's email address, if applicable.

o **Phone #:** The patient's phone number.

o **Diagnosis:** The patient's medical diagnosis.

o **ICD/9 Code:** The patient's diagnosis code.

o **Employer/Group:** The name of patient employer.

o **Patient Coverage Effective Date:** The date the patient's insurance coverage began.

o **Eligibility Verification Phone #:** A telephone number for the medical center to verify benefit information.

o **Other Coverage (Primary/Secondary):** Other known insurance provider for the patient. Show the provider's status: Primary or Secondary.

o **If Medicare, then Medicare Effective Date:** Input date the patient's medicare coverage began.

o **Living Donor Info:** When applicable, the Living Donor's full name and birth date.

CASE MANAGER TAB

The Case Manager tab auto-populates with your contact information. Please take this opportunity to review and ensure that we have your correct contact information. You will see a question asking you if you need to add a new person. This allows you to enter another Case Manager's information and can be used when you are submitting an NF on behalf of another Case Manager. You will also see a question asking you if you need to update the information. This allows you to revise the Case Manager contact information.

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OptumHealth Transplant Notification Form Page – Claims Info Tab

CLAIMS INFO TAB

The Claims Info tab requires that you identify the key claims contacts that will handle your patient's claims.

Claims Mailing Contact: The person who should receive OptumHealth priced claims. The required fields will default to the information that was entered on your last submitted NF.

Claims Status Contact: The person OptumHealth should contact for claims payment information. The required fields will default to the information that was entered on your last submitted NF.

Invoice Billing Contact: The person who should receive OptumHealth Access Fee Invoices. The required fields will default to the information that was entered on your last submitted NF.

COMMENTS TAB

The Comments tab allows you to enter additional information that you would like to provide to your account manager. This is not a required field. Once you have navigated through all the Notification Form tabs and have completed all required fields, press the "**Submit**" button. If you have missed required fields, you will be prompted to complete those fields and then re-submit by pressing the "**Submit**" button. You will also have the following options: Discard and Save as Draft. (please see section "Standard NF and EZ-NF action bar" for further details)

OptumHealth Transplant Notification Form Page – Comments Tab

The EZ-NF

You can access the EZ-NF by clicking on "**EZ-NF**", which will open the EZ- Notification Form Product Selection Page. Within this page you will see a variety of product logos, select the product that you would like to access by clicking on the product's logo. We will walk through the Transplant Resource Services EZ-NF to give a step-by-step explanation on how to complete the EZ-NF form.

OptumHealth Notification Form Product Selection Page

Taking a Closer Look at the Transplant EZ- Notification Form

The Transplant EZ-NF opens to a simplified one page form. The form has fewer required fields, for those Case Managers that do not have all the information or need assistance with submitting their online notification form. Each required field is noted with a blue asterisk and bolded text. Once the required fields are completed, press the "submit" button.

The EZ-NF will be routed to an OptumHealth Account Manager who will contact you to complete the Notification Form process.

OptumHealth Transplant EZ-Notification Form Page

Other Product NFs - Other OptumHealth products have similar Standard Notification Forms.

Cancer Resource Services

Standard NF

The Cancer Standard NF can be accessed by selecting the Cancer Resource Services product logo on the Notification Form Product Selection Page. The Cancer Resource Services Notification Form opens to a multiple tab form, similar to the Transplant Resource Services Notification Form example above.

The General Tab requests CRS specific information:
- **CRS Contract remains effective until:** This field auto-populates to one year from Case Effective Date.
- **Is this a renewal?** Select yes or no.

EZ-NF

The Cancer EZ-NF can be accessed by selecting the Cancer Resource Services product logo on the EZ-NF Product Selection Page. The Cancer Resource Services EZ-NF opens to a one page form, similar to the Transplant Resource Services EZ-NF example above.

The General Tab requests CRS specific information:
- **CRS Contract remains effective until:** This field auto-populates to one year from Case Effective Date.
- **Is this a renewal?** Select Yes or No.

Congenital Heart Disease Resource Services

Standard NF

The Congenital Heart Disease Standard NF can be accessed by selecting the CHD Resource Services product logo on the Notification Form Product Selection Page. The CHD Resource Services Notification Form opens to a multiple tab, similar to the Transplant Resource Services Standard NF example above.

EZ-NF

The Congenital Heart Disease EZ-NF can be accessed by selecting the CHD Cancer Resource Services product logo on the EZ-NF Product Selection Page. The Congenital Heart Disease Resource Services EZ-NF opens to a one page form, similar to the Transplant Resource Services EZ-NF example above.

Kidney Resource Services

Standard NF and EZ-NF

The Kidney Standard NF form can be accessed by selecting the Kidney Resource Services product logo on the Notification Form Product Selection Page. The Kidney Resource Services Notification Form opens to a one page form.

The General/Medical Center Information section requests KRS specific information:
- **Medicare Certified?:** Select Yes or No.
- **CMS ID:** The Provider ID # for your patient's chosen medical center.

The Patient information section requests KRS specific information:
- **Patient Height (CM):** The patient's height in centimeters.
- **Patient Weight (Kg):** The patient's weight in kilograms.
- **EPO Dosage (Units):** The patient's EPO dosage in units.
- **Frequency per week:** The number of EPO treatments your patient receives per week.
- **Route (IV or SQ):** The route that the patient receives treatment: IV or SQ
- **OON Deductible:** The patient's out of network deductible in dollars.
- **OON Out of Pocket:** The patient's out of network - out of pocket maximum in dollars.
- **OON Co-pay:** The patient's out of network Co-pay in dollars.
- **Does the patient have a co-payment, co-insurance or deductible that, combined, is less than $10,000 per year?:** Select Yes or No.

Standard NF and EZ-NF Action Bar

You will have an action bar at the bottom of each screen within the Standard NF and EZ NF. The buttons provided allow you to route the NF to various queues.
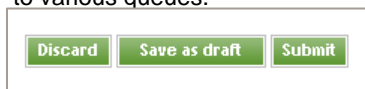
OptumHealth Notification Form Action Bar

- Discard: This button is used when you would like to delete an NF. Users can click on "Discard" to erase the NF. The NF will not save in any queues.

- Save as Draft: Users that are creating an NF and get interrupted or do not have time to fully complete the NF can click on "Save as Draft" to ensure that their NF is saved. This allows you to return to the Your Drafts queue and complete the NF. (The web site is set to log off users after 20 minutes of inactivity).

- Submit: Users that have completed filling out their NF should click "Submit" to route the NF to the appropriate queues where OptumHealth operations can begin to process the NF.

Using the View Options

The online NF provides clients with multiple viewing options:

OptumHealth Notification Form Home Page

- ▪ <u>Show Faxed to Facility.</u> This view will provide you with a listing of all NF's you have submitted and the date they were faxed to the facility.

- ▪ <u>Your Drafts.</u> This view will show all the NF's you have "Saved as Draft". Drafts will only be saved for 30-days.

- ▪ <u>Show All Submitted.</u> This view will show all NF's submitted by you regardless of current status (i.e., faxed to facility). You can use this view to confirm that your online Standard NF or EZ-NF was saved and submitted correctly.

OptumHealth All Submitted Queue

NOTE: **This viewing option will automatically display all notification forms from the past 30 days. You may change the view to display notification forms from either 60 or 90 days prior by clicking on the drop-down box, selecting a new day range and then clicking the, "Change Display" button. You may also click the NF's 90+ days to display a search for any NF's 90+ days. (Shown Below)**

OptumHealth All Submitted Queue - 90+ Days

What Can I Print From the System?

The Online NF allows you to download a PDF version of the NF you have submitted. You will see the icon located in the upper right-hand corner of the window once you have selected a patient. By clicking on the icon, you can open the form and print or save for future reference. Remember that the Online NF Application will always retain submitted NF's in an online format.

Who do I Contact with Questions?

If you have questions about how to use the Online NF application, definition of terms, or questions regarding content, please contact your Account Manager at (800) 847-2050. If you experience technical or performance related issues, please use the feedback form on the web site.

How do I Provide you with Feedback?

Your input is essential to the development and effectiveness of our tools. There are several ways that you can provide feedback.

- You can use the "Feedback" link on each page to send us feedback.

At OptumHealth, we believe strongly that our Web sites are only as good as the service they provide to the clients we serve. To that end, we strongly encourage you to provide us with your feedback regarding the web site. We are continuously working to improve and enhance this web site to meet your needs.

OptumHealth
6300 Olson Memorial Hwy
MN010 – S157
Golden Valley, MN 55427

If you have questions or need assistance with the web site, please contact OptumHealth at:
Phone: (800) 847-2050
Email: cmc_customer_service@optumhealth.com
Fax: (262) 313-9808