Optum Uploader user guide

The Optum® Uploader was developed to provide an interface that allows multiple users to securely submit assessments for the Optum In-Office Assessment Program without issue of failed delivery or suspended access. The Uploader tool:

- Does not require any user credentials
- Complies with all HIPAA guidelines to protect your practice and your patient's personal data
- Allows anyone in your office to access the site and upload documentation
- Securely transmits directly to Optum
- Requires less time and effort than preparing and submitting documentation via mail or fax

To get started please visit optumupload.com and follow the instructions on the next page.

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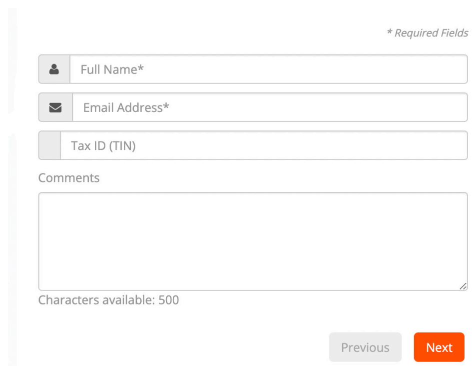
Step 1: Prepare your files

- Prepare your assessment(s), medical record(s) and any additional supporting documentation. The Optum Uploader only supports the following file types: .pdf and .tif (.jpeg files are not supported).
- All components of the submission (that is, the assessment, medical record(s), additional documentation, etc.) must be uploaded as one PDF per member. Users may upload and submit multiple PDFs simultaneously, up to 50 non-password protected files, up to a maximum size of 10MB each.
- Each member's information must be contained in a separate PDF, resulting in one PDF per member. For example, a user may submit 10 PDFs, representing 10 different members.
- Save the new PDF using the following naming convention:
  - MemberLastName_MemberFirstName_MemberID.pdf
  - For example: Doe_John_012345678.pdf
  - Please see the next page for helpful instructions to create a single PDF, per member, from all associated documents. You will need Adobe® Acrobat® (or other PDF conversion software) to complete the process.
- Click the "?" in the upper right corner to display this help document at any time.

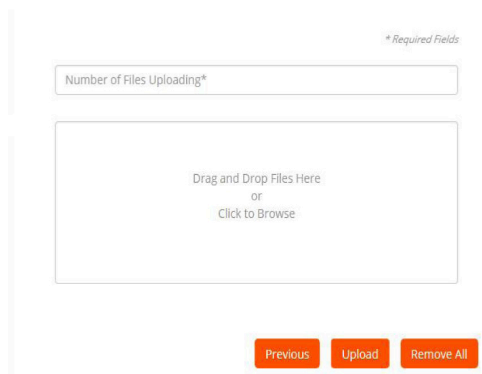
Step 2: Enter contact information

- Enter your name (required)
- Enter your email address (required).
- Enter your Tax Identification Number (TIN).
- Enter any comments about the files being uploaded. Questions about status or receipt will not be answered.
- Click "Next."



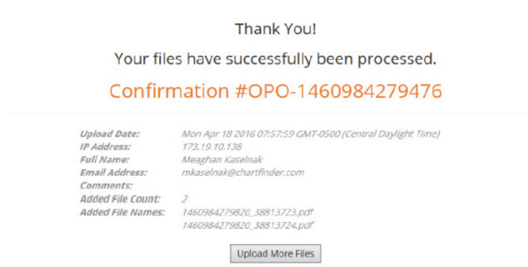
Step 3: Upload files

- Enter the number of files you will be uploading. The file size limit for a single file is 10MB and a maximum of 50 files can be submitted at once. This number will allow an accurate accounting of all assessments submitted.
- Click "Upload" when ready to proceed.



Step 4: Receive confirmation

- Retain your confirmation number in the event you have questions about the submission.



Document merging instructions

The instructions below are specific to Adobe® Acrobat® X ProTM. For other versions of Adobe® Acrobat®, please visit adobe.com. For assistance with using other PDF conversion programs, please refer to the instructions included with your product.

- Launch Adobe Acrobat and open the member's assessment.
- Under "Tools" menu, locate and select "Pages."
- Select "Insert from File" (located under "Insert Pages"). A new pop-up window will appear.
- Navigate to the folder where the member-specific documentation is stored. This may include the medical record(s) and supplemental documentation. All documents must be in PDF prior to starting the merging process. If the documents are not PDFs, please complete the PDF conversion process first.
- Select the first document to insert (for example: John_Doe_MedicalRecord.PDF).
- A new pop-up window will appear asking if the selected PDF should be inserted before or after the document which is currently open. Select "After."
- Repeat previous step until all additional PDF documents for that member have been added.
- When all files have been added, save the new PDF using the following naming convention:
  - MemberLastName_MemberFirstName_MemberID.pdf
  - For example: Doe_John_012345678.pdf
- Repeat this process to create a single PDF for for each member whose assessment you are submitting via the Optum Uploader.

About the In-Office Assessment Program

The Optum In-Office Assessment Program can help providers identify and address chronic conditions that may otherwise go undiagnosed and/or untreated.

For questions

Please contact your Optum representative or the Optum Provider Support Center:

Call: 1-877-751-9207 between 8 a.m. and 7 p.m. ET, Monday–Friday

Email: providersupport@optum.com

Additional tools

Talk to your Optum representative about additional tools for the In-Office Assessment Program. These include the provider instructions and program materials.

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optum.com