Provider Sign-Up and User Management

Contents

Sign Up

Welcome to ConnectCenter. Before submitting transactions, you will need to complete the sign-up process. The sign-up process will create:

- Your ConnectCenter ***user*** account
- A "***submitter***" account through which you and your co-workers can share information in ConnectCenter. You will use User Management in ConnectCenter to create additional user accounts for your colleagues.
- A provider record for use in claims or status inquiries. If your office or facility has multiple providers, you will have the opportunity to add more later, via the Provider Management feature.

Submitter ID is an important number that uniquely identifies your office. Because you will need it when contacting customer support, it will always be displayed at the top of the ConnectCenter window, after you login.

Please do not use Sign-Up more than once. Additional users and additional providers should be added **after** your initial use of Sign-Up and after you log into ConnectCenter.

Note: there are two exceptions to the one-time use policy for Sign-Up:

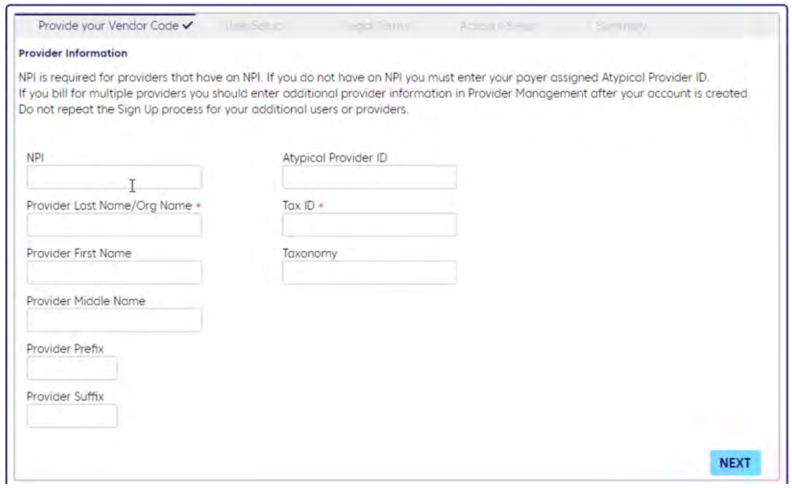
- Providers who are sponsored for use in ConnectCenter by more than one Insurance company will need separate submitter accounts for each insurer. While multiple plans available from the same insurance company or family of companies can be accessed from a single submitter, access to plans from unrelated insurance companies will require separate ConnectCenter submitter accounts.
- If you have some staff that support one group of providers and other staff that support different providers ***and*** you wish to keep these groups from having access to one another's claims, you will need separate submitters for each group. Each group must also have a unique NPI or atypical ID.

Signing up for ConnectCenter is easy. To begin the process, simply access: https://physician.connectcenter.changehealthcare.com/#/site/home?vendor=214629.

Steps to Sign-Up

Step 1 – Provider Information

Begin by identifying your medical practice or service provider by using the primary NPI for the provider. If you do not have an NPI, then you must supply the Atypical Provider ID assigned to your organization by the payer or plan sponsoring your use of ConnectCenter. An atypical provider ID may be a state issued provider ID, such as a Medicaid ID, or similar payer assigned provider ID.



If you enter an NPI, the application will retrieve data associated with your NPI from the National Provider registry and prefill many of the remaining fields required in the Sign-Up application. Please correct any pre-filled information that you find to be inaccurate.

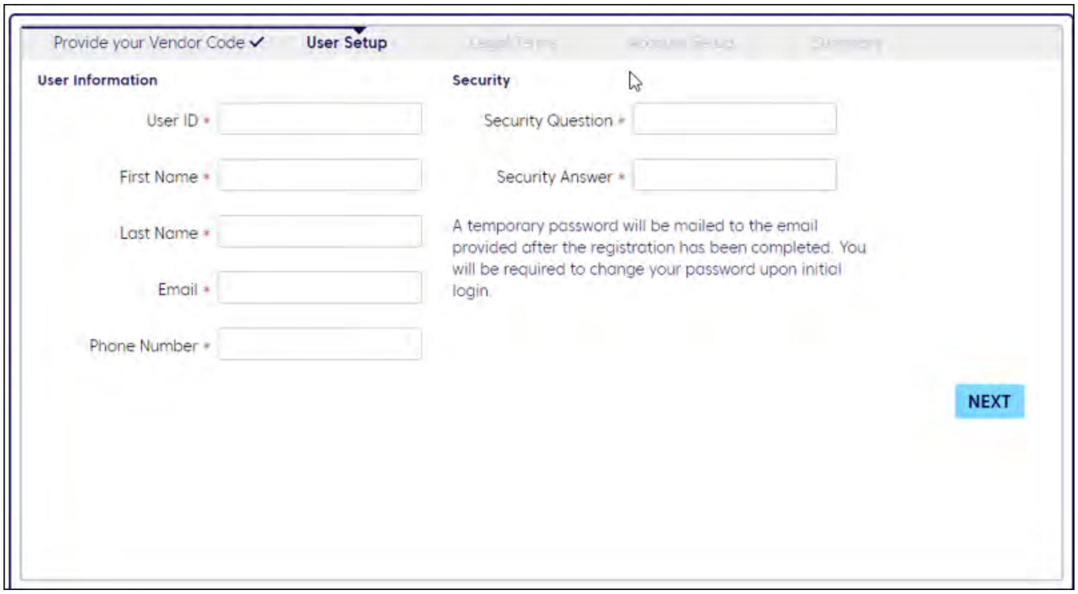
Please note that your NPI, Tax ID and/or Atypical Provider ID will be compared to existing ConnectCenter records to prohibit the creation of duplicate accounts. If your provider already has a ConnectCenter account for the same insurance company you have currently identified as a sponsor, you should use your original account and not create a new one. If you need to add additional users to the previously created account, please see the instructions at the end of this guide, in the User Management section.

All information entered at Sign-Up will be saved for later use in submitting claims or other transactions. Consequently, it is highly recommended that optional fields, such as Taxonomy, be completed.

Field	Notes
NPI	10 digits Required unless unavailable
Tax ID	9 digits Required
Atypical Provider ID	Required only when NPI is not available
Provider Last Name or Organization Name	Required Max length 50 characters
Provider First Name	If the provider is an entity and not a person, omit. Required for a provider who is a person Max length 30 characters
Provider Middle Name	If the provider is an entity and not a person, omit. Max length 20 characters
Provider Suffix	If the provider is an entity and not a person, omit. Max length 5 characters. Examples: Jr, Sr, III
Provider Title	If the provider is an entity and not a person, omit. Max length 30 characters. Examples: Dr., Ms., Mr.
Taxonomy	10 digits Because this field is required in claims, **it is highly recommended that it be provided.** Please note that if you have multiple taxonomies registered in NPPES, the taxonomy prefilled in this field may **not** be your primary taxonomy. Please make any updates needed to ensure that your primary taxonomy is entered.

Step 2 – User Setup

On the User Setup page, complete all required fields, indicated by *.



Field	Notes
User ID	• Minimum of 5 characters, maximum of 15 characters • Character types allowed: alpha, numeric, underscores and dashes • Must contain at least one alpha character • Is **not** case sensitive (In other words, a user who creates an ID of JOHNDOE will be able to login by entering johndoe on the login screen.)
First Name	• Maximum of 30 characters
Last Name	• Maximum of 30 characters
Email	• Must be a valid email address
Phone Number	• No dashes or other punctuation allowed
Security Question	• Create your own security questions for use in resetting forgotten passwords
Security Answer	• Provide the answer to your question

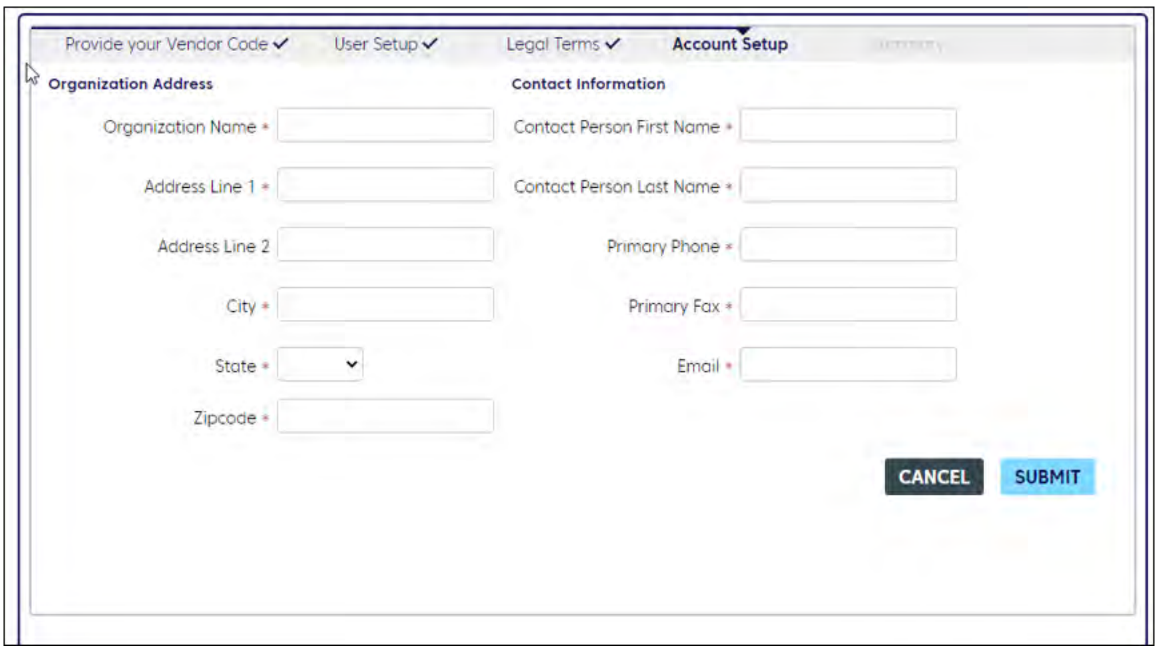
A temporary password will be emailed to you after the registration process has been completed. You will be required to reset your password upon initial login to the website

Step 3 – Legal Terms:

On the **Legal Terms** page, read the terms and conditions for using ConnectCenter. If you agree with the terms and conditions, click ‘Yes, I agree to these terms and conditions.’ Please note that although these terms contain provisions for payment and price increases, the sponsoring payer has agreed to be responsible for all charges arising from your use of this ConnectCenter account.

Step 4 – Account Setup:

On the Account Setup page, please provide basic information about your organization. All fields are required and must be completed except for Address Line 2 and fax.



Field	Notes
Organization Name	• Maximum 50 characters • Allowed character types: alpha, numeric and space characters only; no other characters allowed.
Address Line 1	• Maximum of 50 characters
Address Line 2	• Optional • Maximum of 50 characters
City	• Maximum of 30 characters

Field	Notes
State	• 2-character state code
Zip Code	• No Dashes or other punctuation
Contact Person First Name	• Maximum of 24 characters • Allowed character types: alpha, numeric and space characters only; no other characters allowed • May default from your name or NPPES contact
Contact Person Last Name	• Maximum of 24 characters • Allowed character types: alpha, numeric and space characters only; no other characters allowed • May default from your name or NPPES contact
Primary Phone	• No Dashes or other punctuation • May default from user phone or NPPES contact
Primary Fax	• No Dashes or other punctuation
Email	• Maximum of 100 characters, required • May default from your email

Step 5 – Summary

On the **Summary** page review each of the critical values displayed:

- Submitter ID – Take note of this ConnectCenter generated ID, as it will be needed to identify your practice or facility in the future.
- Biller ID, - This code is the ConnectCenter identifier for the payer sponsoring your use of ConnectCenter. We recommend you record it for future use. If you intend to upload 837 claims batch files, Biller ID will need to be included in your claim headers (See Uploading A Claim for details.)
- Submitter Name – Validate that your organization name has been correctly captured.
- User ID- You must use this credential to login to Connect Center.
- Features selected – All features identified will be available for your use.

Click 'DONE' when finished.

Two confirmation emails will be sent:

1) ConnectCenter Welcome email with new account information, sent from ConnectCenter@Optum.com
2) Temporary password email to use with the User ID created during the registration process above, sent from EDIEnrollmentSupport@Optum.com

Confirmation emails are typically received within 90 minutes. If you have not received confirmation emails, please check SPAM folders and/or wait at least 2 hours before contacting the Registration/Enrollment team for assistance (contact information can be found at the end of the document).

Note: Your registration has a 2-business day waiting period between account creation and when you will be able to access our online Customer Care Hub (customercare.optum.com) or reach a live agent for phone or email for support. In the interim, ConnectCenter offers online help, education videos and downloadable reference guides. Don't miss the short Getting Started guides which provide tips and tricks specific to various important features in ConnectCenter--like creating a claim or checking member benefits.

Once you’ve reset your password, you may begin submitting eligibility and claim status transactions immediately (providing the payer supports these features).

Please note that claims submitters must wait one business day after registration to begin submitting claims.

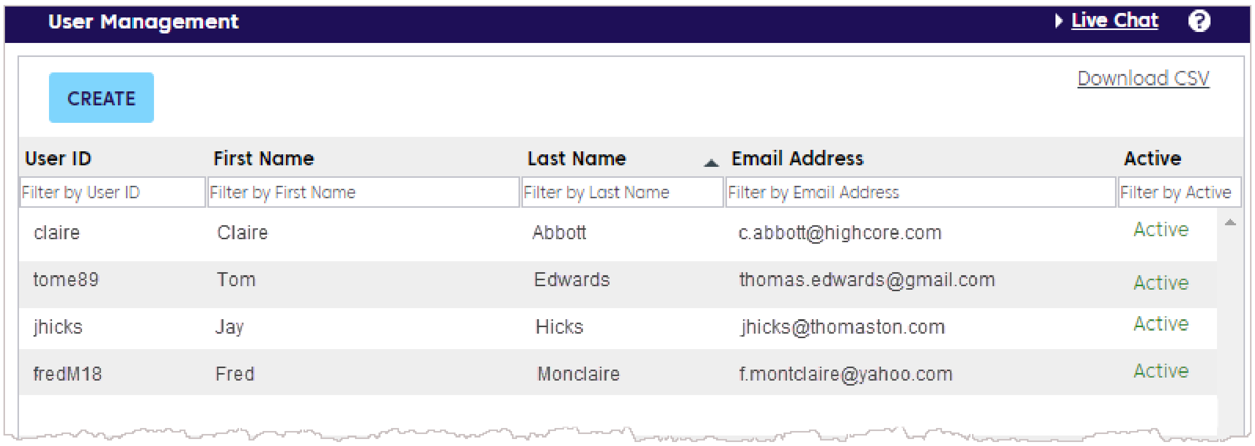
Special Note for Providers Using Remittance

To view remittance in ConnectCenter you must enroll your provider with the payer so that remittance is directed to ConnectCenter.

Please see ‘Getting Started with Enrollment Central’ for step by step instructions to enroll in remittance for ConnectCenter. If remittance transactions are not sponsored by your payer, Enrollment Central is not needed and may not be displayed to you.

User Management

After logging in to ConnectCenter, User Management can be accessed from the Admin menu.



User Management allows you to:

- Create additional users
- Review a list of your users, including the status of each user account.
- Edit account information including deactivating and reactivating users
- Download a list of your users. The .CSV file includes the user ID, first name, last name, e-mail address, and status.

Administrative Users

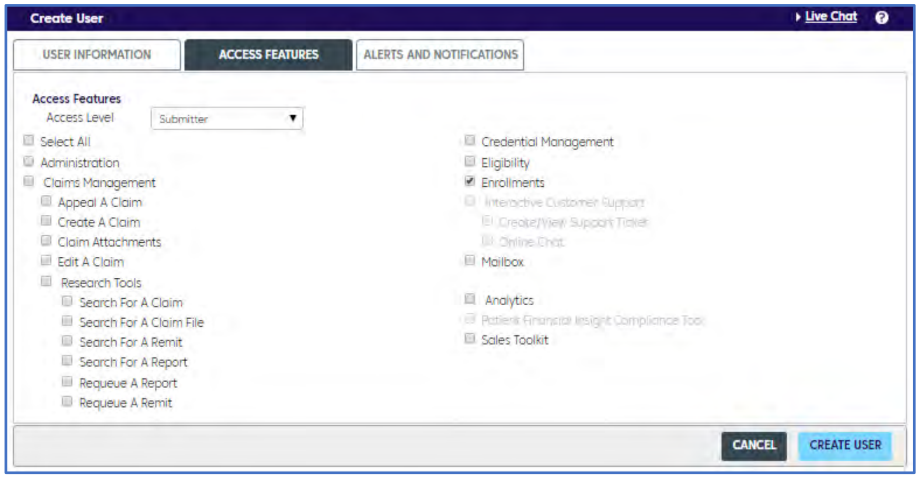
- The initial user created during the Sign-Up process will be given the Administrative role.
- Administrators can add or remove Access Features for any users associated with their account, apart from their own account. Note that all users should have a minimum of one function assigned to them. Changing assigned features is disabled when you are viewing your own user account.

User Information Tab

On the User Information Tab you can add or update information about the user such as the name or email. Administrators can also set the account as Active, add security information, and indicate the User Type.

Access Features Tab

Select the contracted items the user can access. Enrollments is the only option selected by default. Use the Select All check box to choose all available features with a single click. Items are disabled if not available to your account.

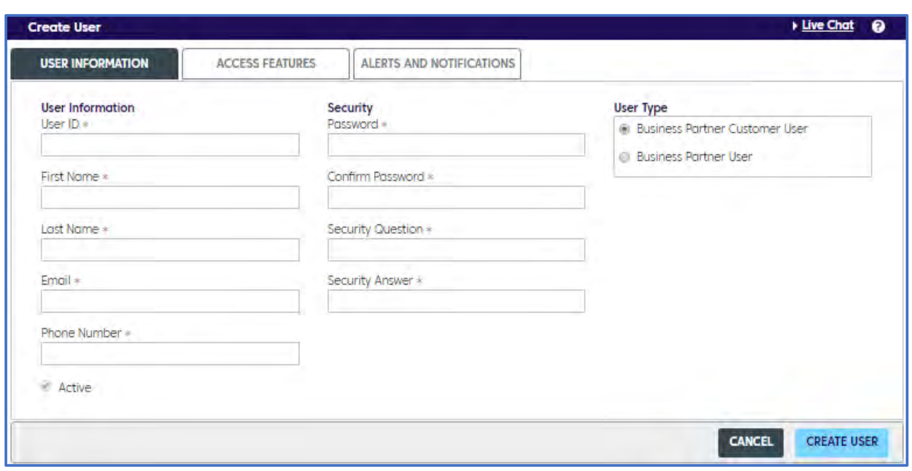


Selections made on this tab will determine whether other users in your account are administrators or not.

Create a User

Follow these steps to add a new user account:

1. From the **Admin** menu, select **User Management**, click the **Create** button to display the **Create User** page:
2. In the **User Information** tab, enter the user's name, contact information and security details.
    - **User ID**: The minimum required length is five characters; the maximum is fifteen.
    - **Phone Number:** Use numbers only. Do not include hyphens, parentheses, or slashes.



- **Password**:
    - The minimum required length is eight characters. Spaces are not allowed.
    - Must include at least one upper-case letter, one lower-case letter, one number, and one special character.
    - Special characters: ! @ # $ % ^ & *

3. Select appropriate items in the **Access Features** tab. Elections made on this tab will determine what a user can access. For example, the Administration option determined whether or not a user has complete access to all of the User Management features described in this guide.
4. In the **Alerts and Notifications** tab, select the **Related Topics** for each area in which the new user needs notices and alerts from Optum. Use the Select All check box to choose all with a single click. By opting in for alerts users will receive advance notification of system maintenance or new feature releases.
5. Click **Create User** when finished. The User Management screen will re-display.