Claim Management

VitalPoint®

Department of Labor

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Overview

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VitalPoint® claims management portal

Facilitate proactive claim management activities



Drive in-network adherence

- Request **pharmacy card**

Claim research and assistance

- Review **notes and documents** on claim record
- Source **home delivery assistance**

Claim profile management

- Proactively manage authorized and restricted **medications**
- Proactively manage authorized and restricted **physicians**

Redirect decision permission

- **Delegate** claims to other decision makers while out of office

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Search for a claim

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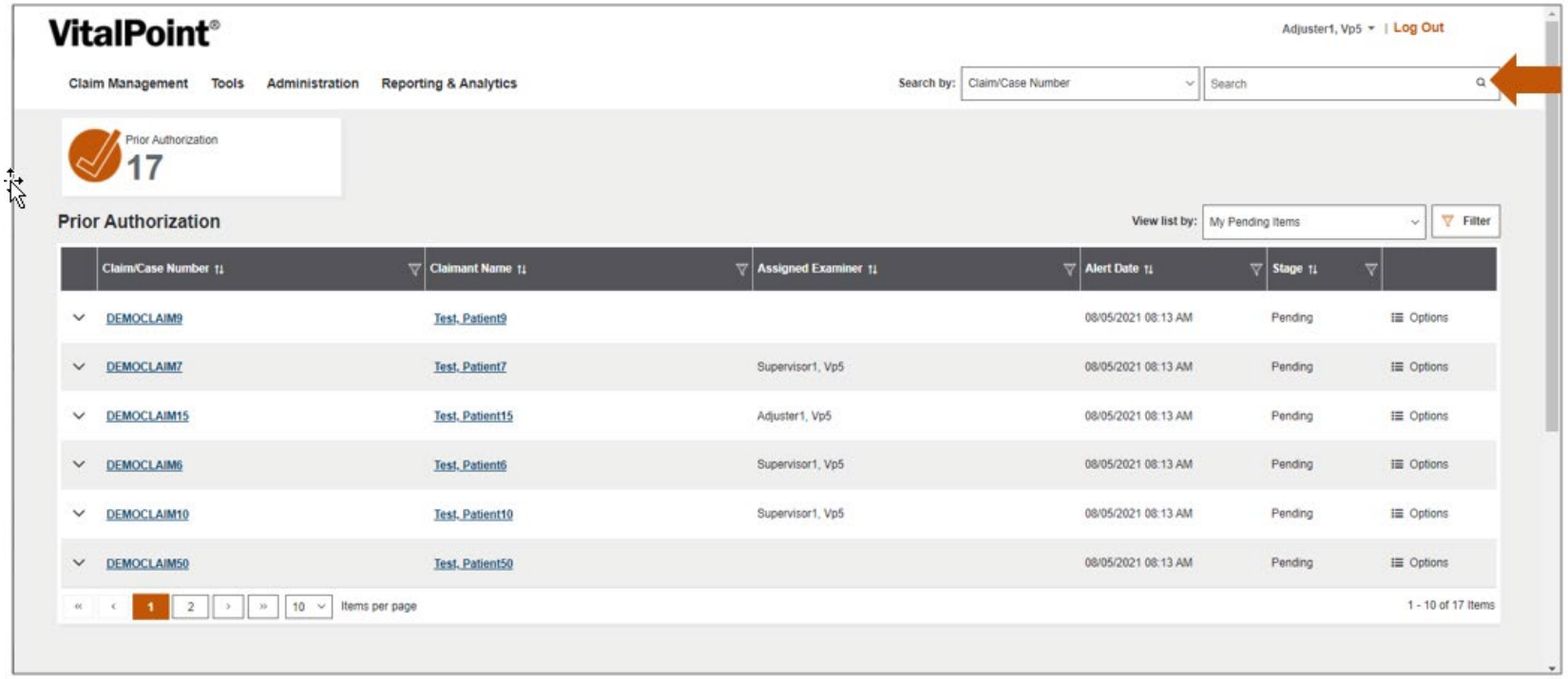
Search for a claim

To find a claimant and access their information, utilize the claimant search feature.



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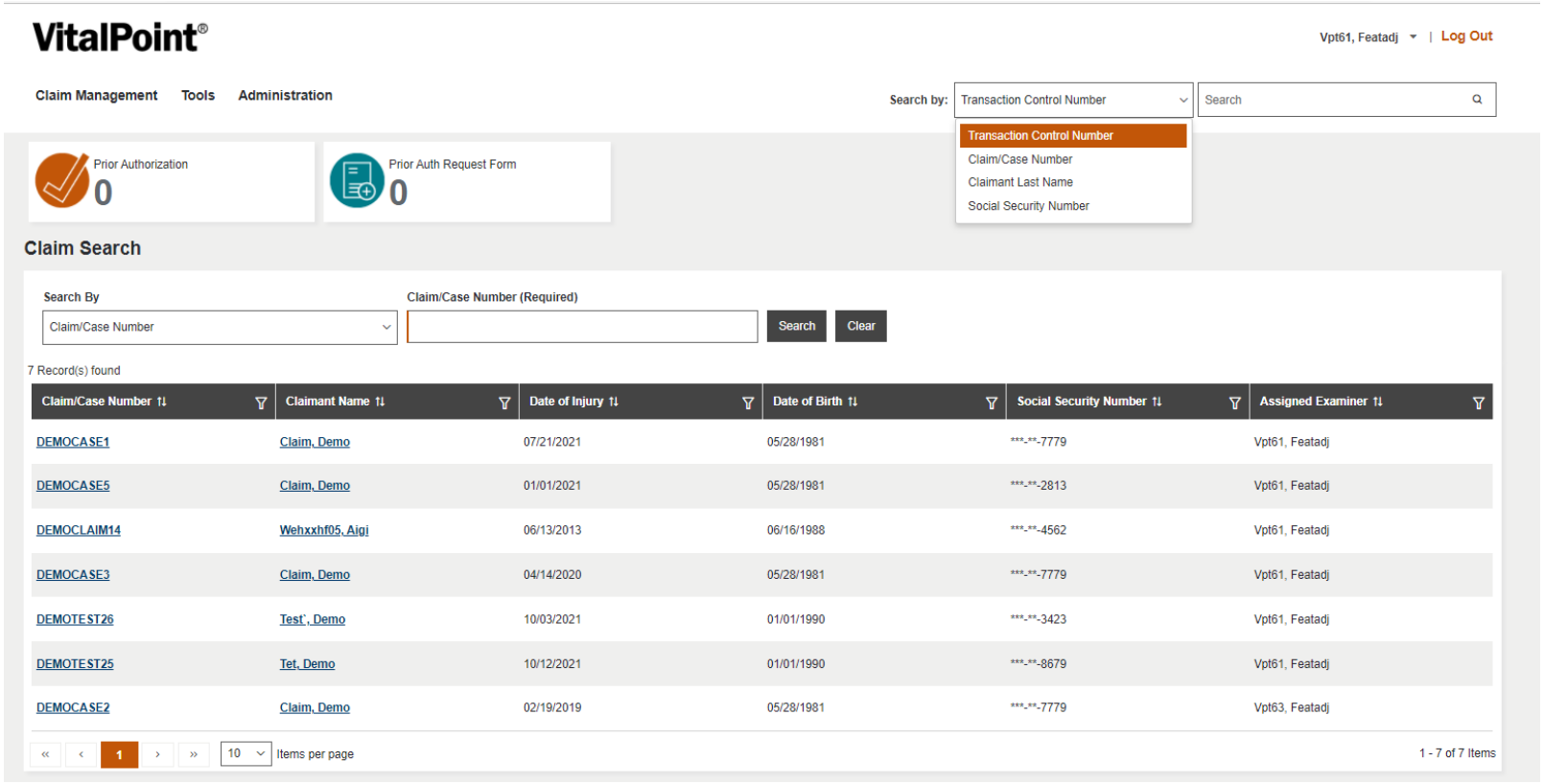
Search for a claim – Search by options

In the **Search by** field in the top right of the screen, use the drop down list to select the search criteria: **Claim/Case Number**, **Claimant Name, Transaction Control Number (TCN)** or **Social Security Number**. Then enter a search value in the **Search** field.



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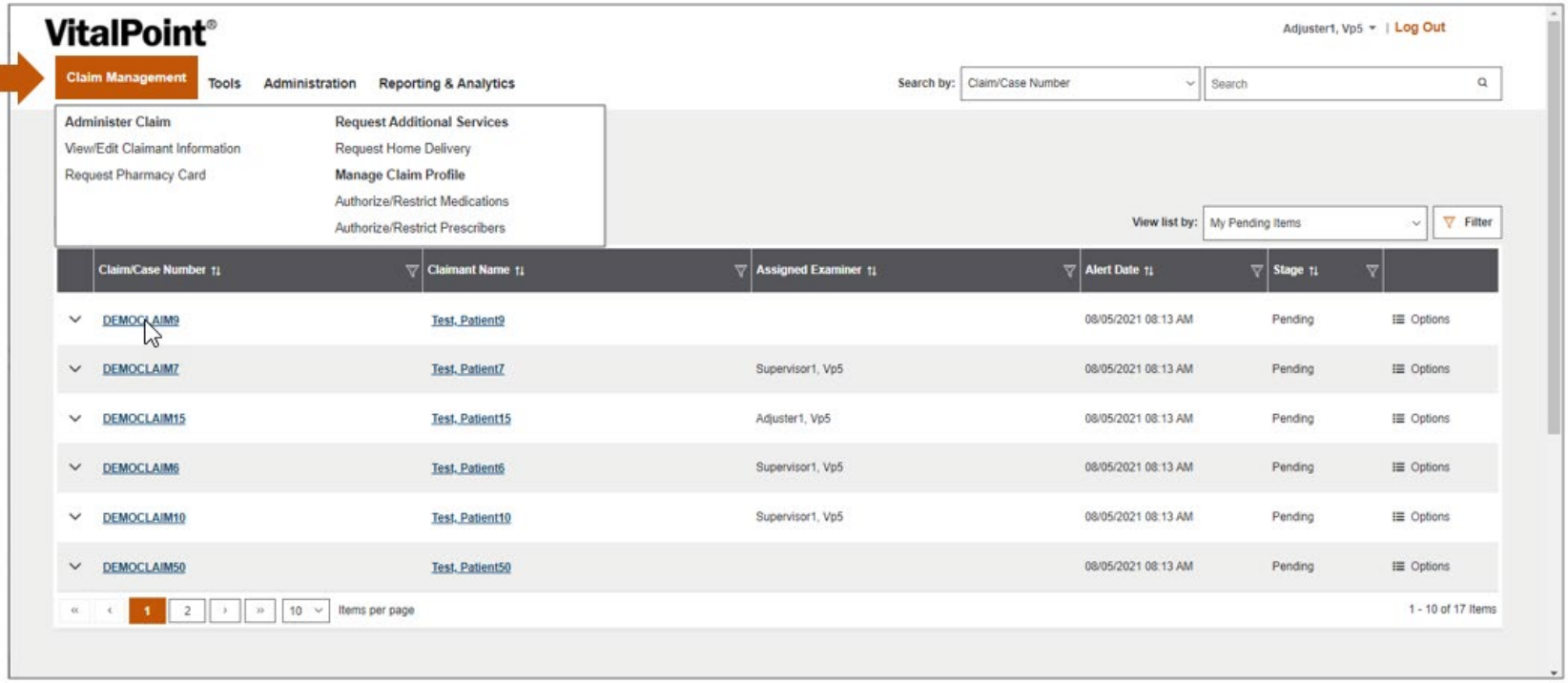
Navigate to View Claimant Information

You can also use the Claim Management feature to access claimant information when there are no pending transactions for the claim.

Go to **Claim Management** in the top menu, then **View/Edit Claimant Information**.

You can view claim demographics and information but cannot edit the information since it is received via electronic eligibility.



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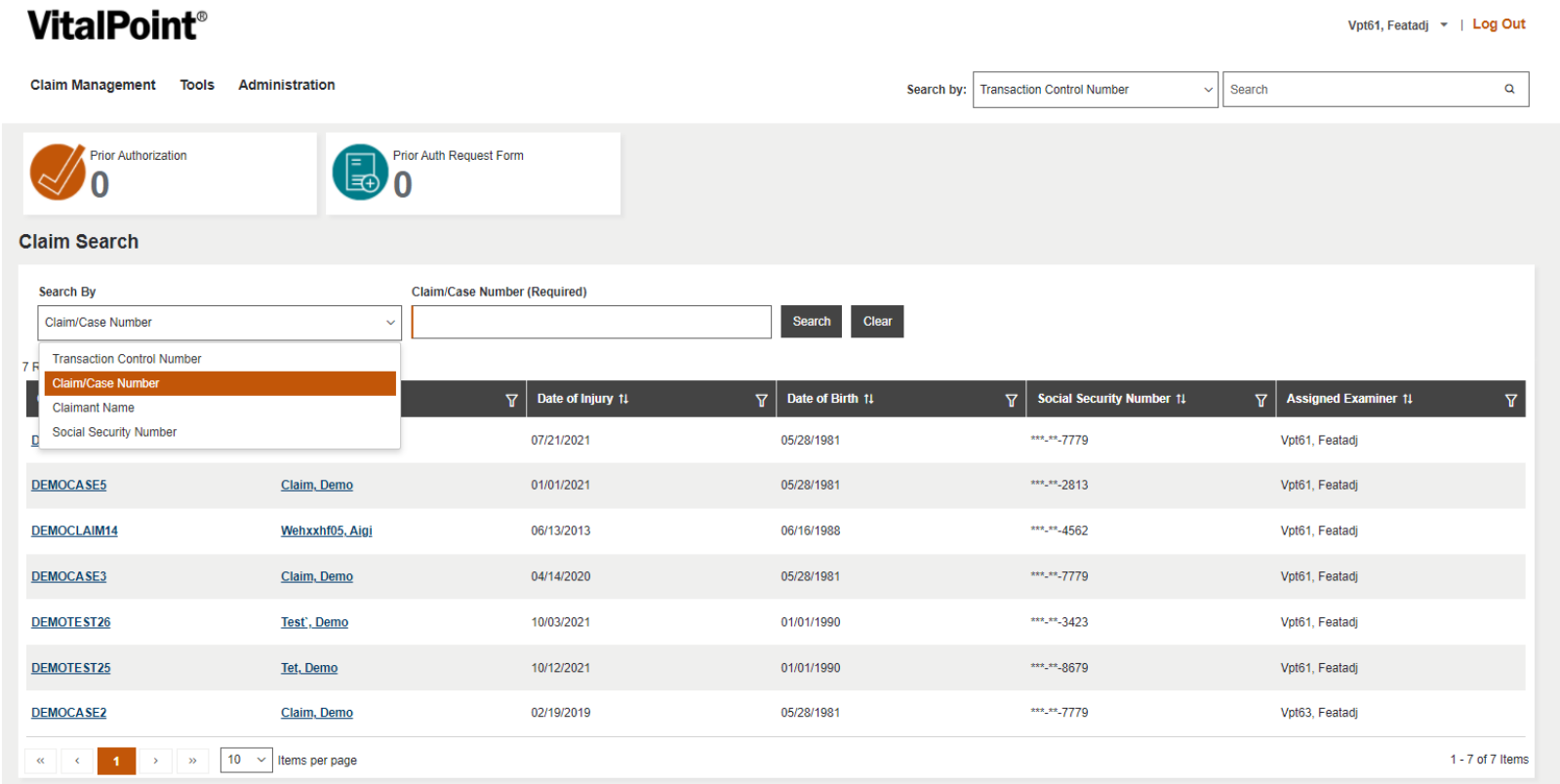
Enter search criteria

Search for a claimant by Claim Number, Claimant Name, Transaction Control Number (TCN), or Social Security Number (SSN).

NOTE: Full or partial Name, SSN, TCN, Claim Number can be used. The more specific you are, the more specific the results.

Click the **Search** button to view results.



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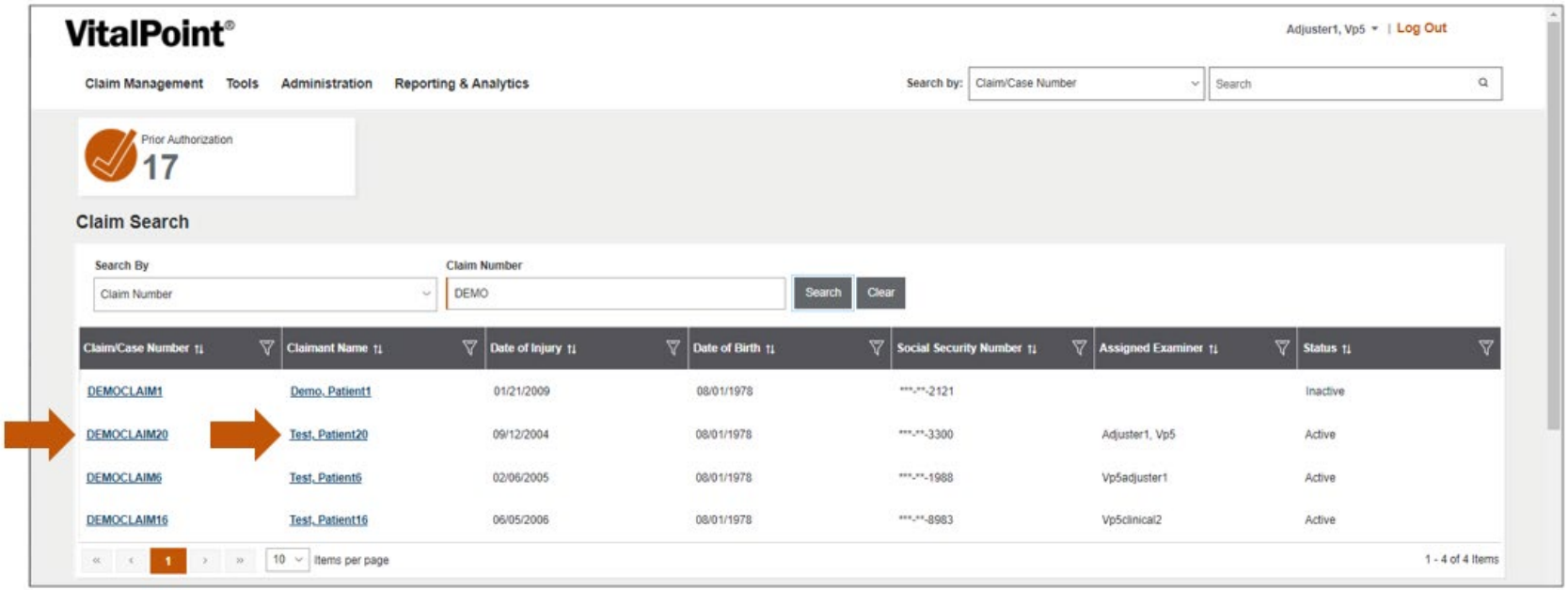
Select claim

Click on the **Claimant's Name** or Claim **Number** to view information.



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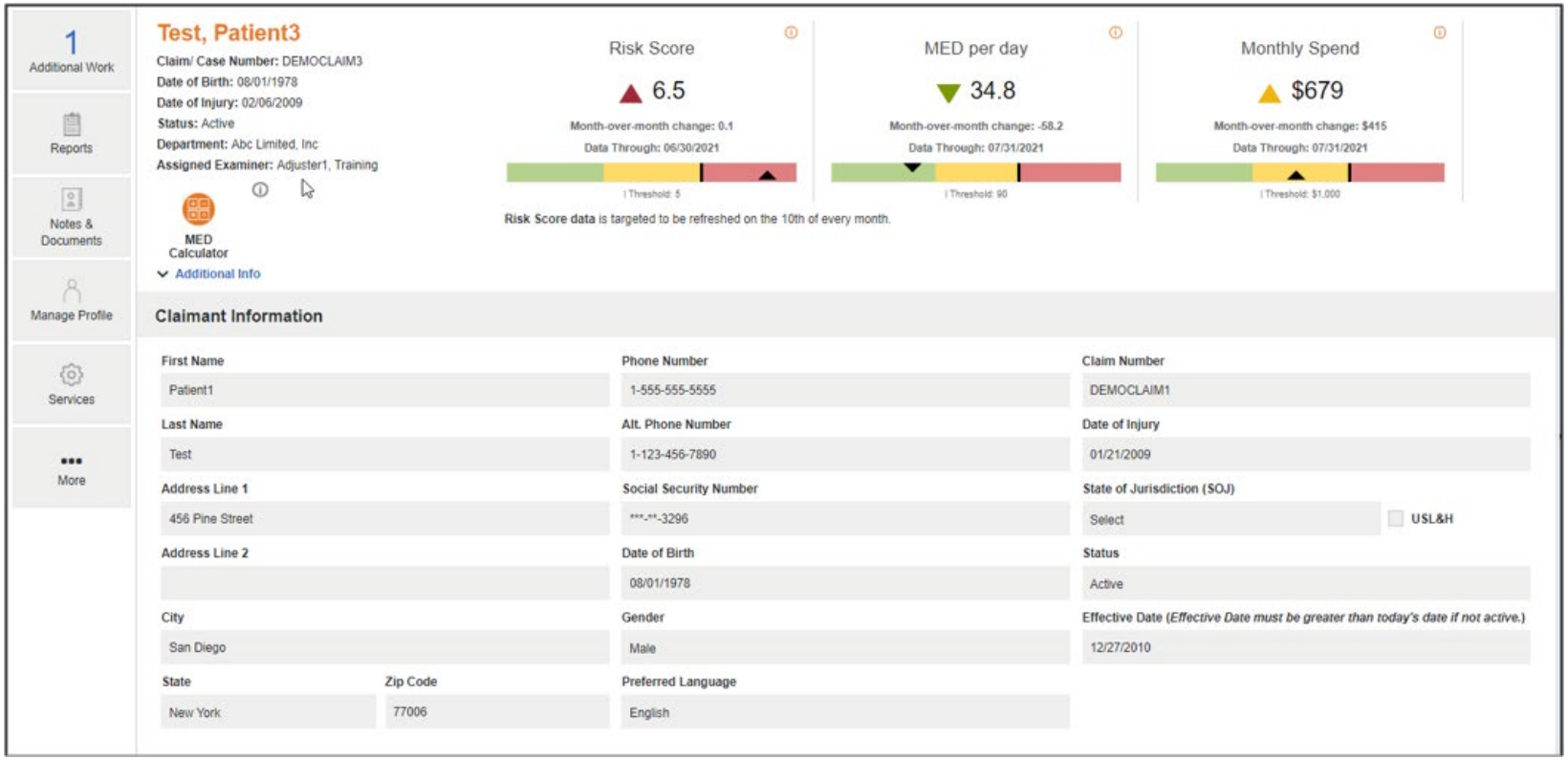
View claim information

When you select the claim, the claimant's information will appear. The **claim menu** to the left provides access to information and actions around the claim. This includes reports, notes and documents, pending transactions, medication and prescriber management, home delivery services, pharmacy benefit card, and medication coverage checks.



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Notes and documents

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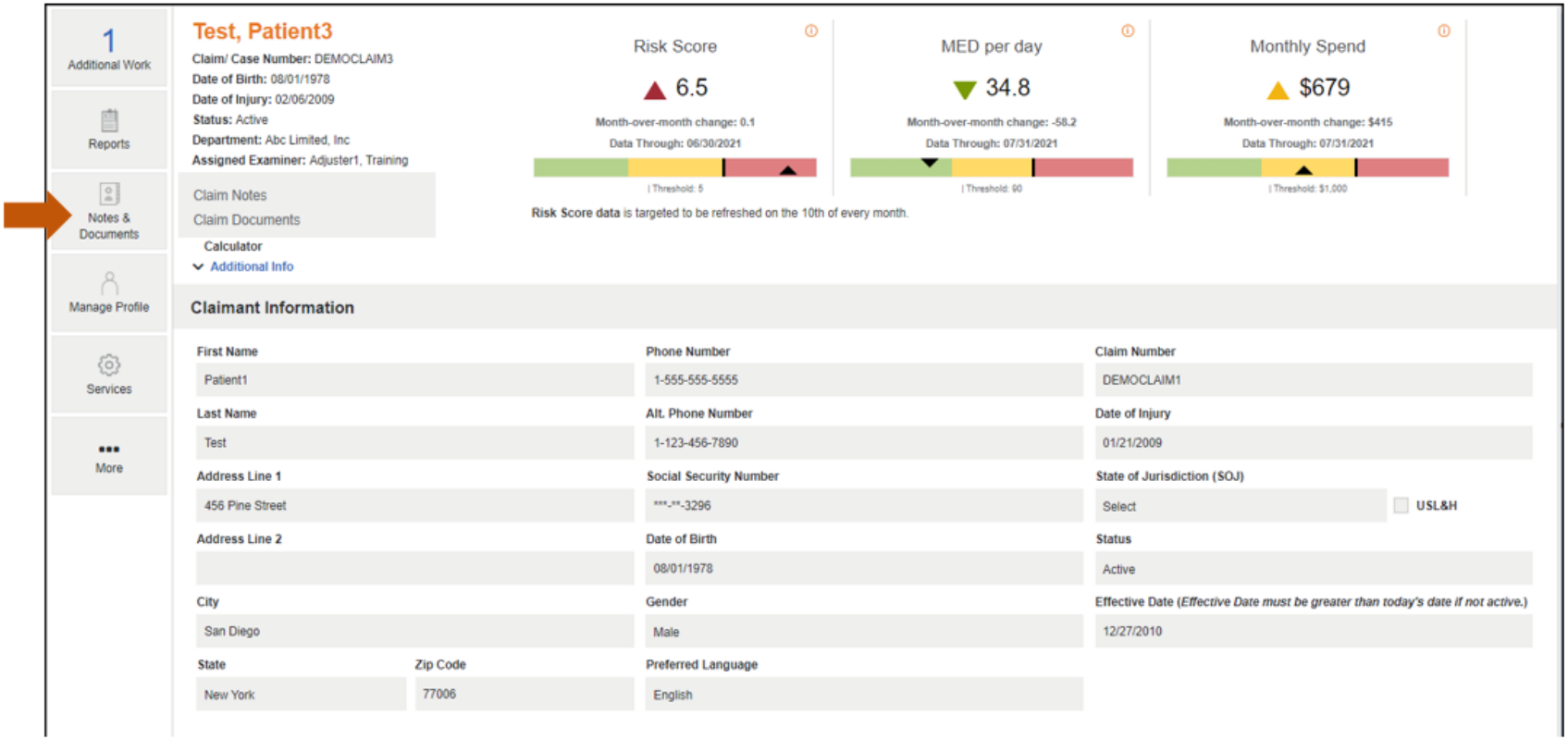
Notes and documents

The Notes & Documents menu provides the following options:

Claim Notes – View or add notes to the claim

Claim Documents – View, download, or add claim documents.



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Claim Notes

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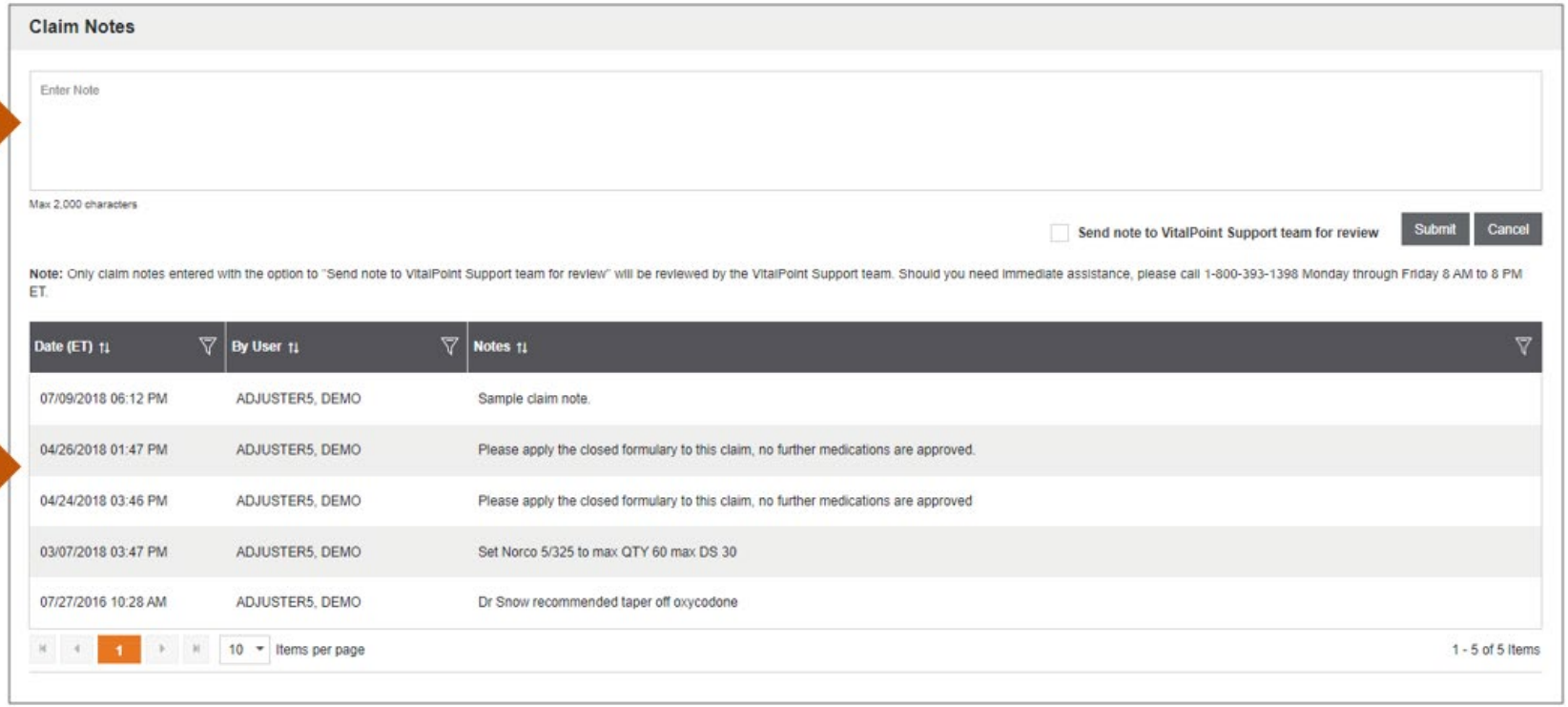
Review existing notes/ submit a new note on file

Claim Notes allows users to add new notes to the claim or view past notes.



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Claim Documents

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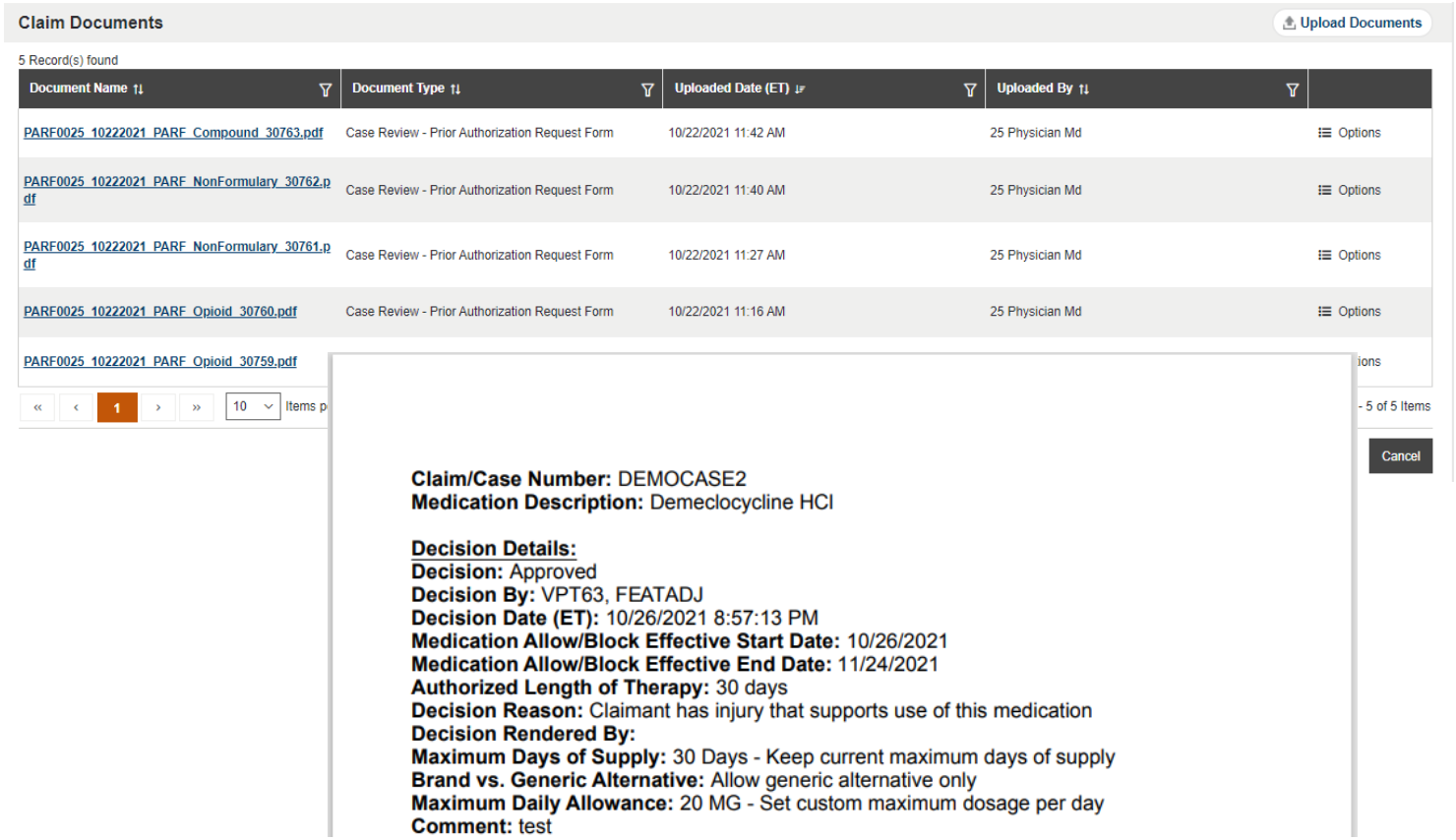
View claim documents on file

A list of available documents related to the claim will appear in the Claim Documents. Click on a document name to download and read a PDF of the document.



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Manage profile

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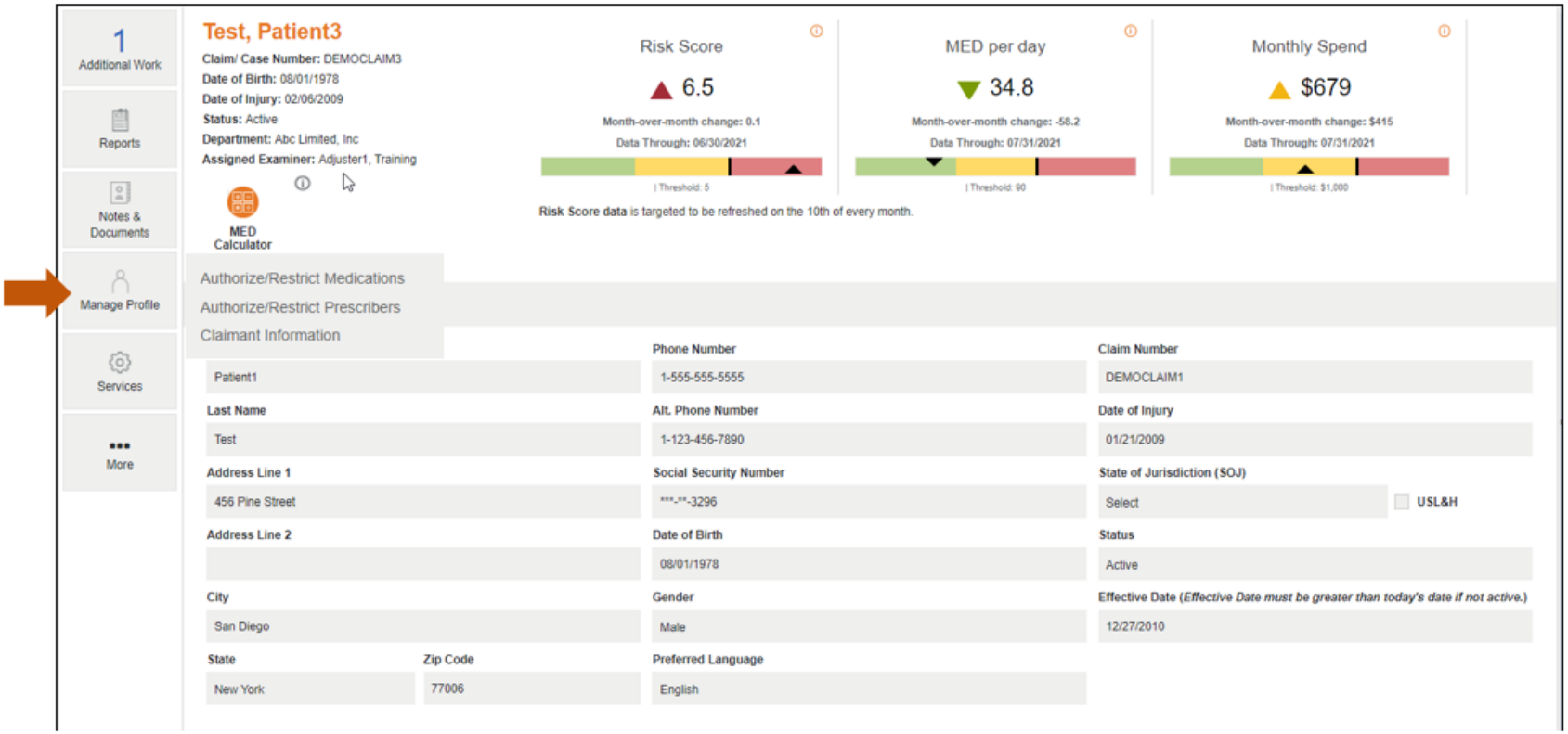
Manage profile

When viewing a claim, the Manage Profile menu allows you to proactively authorize or restrict medications and physicians.

Authorize/Restrict Medications – Proactively approve or deny medications

Authorize/Restrict Physicians - Proactively approve or deny prescribers



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Authorize/Restrict Medications

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Current Medication Profile

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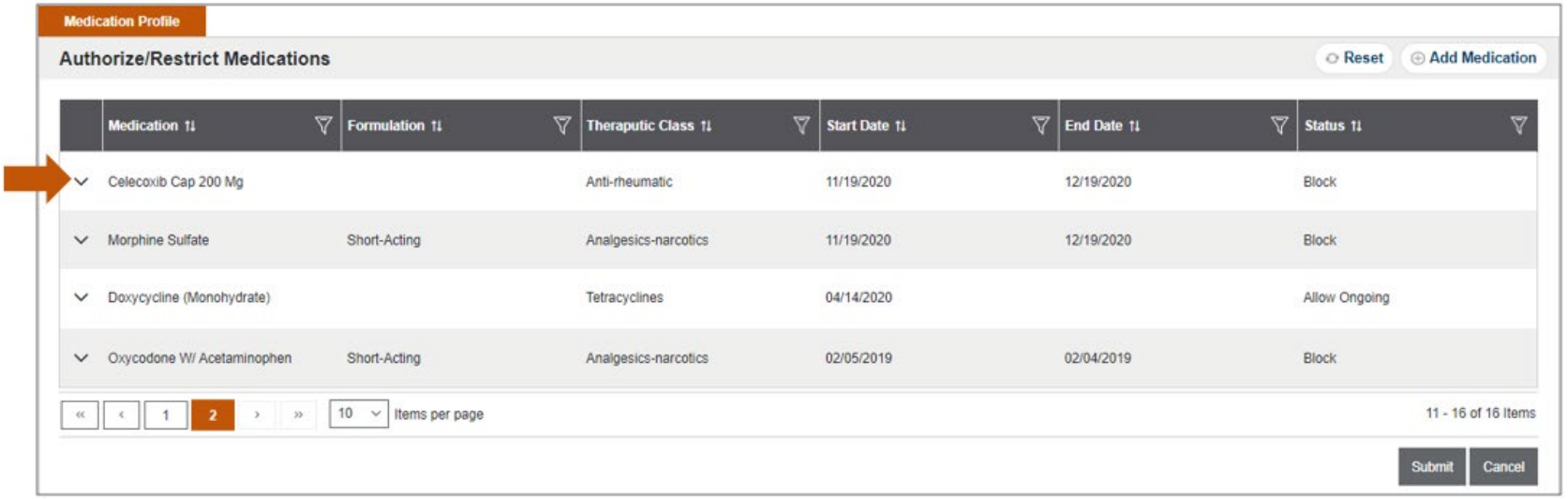
View current medication profile (above and beyond formulary)

Set rules for how Optum should manage scripts for the medication for the claim. When a medication already has a previous decision on the claim profile, click the **chevron** to expand the decision panel and render any necessary changes.



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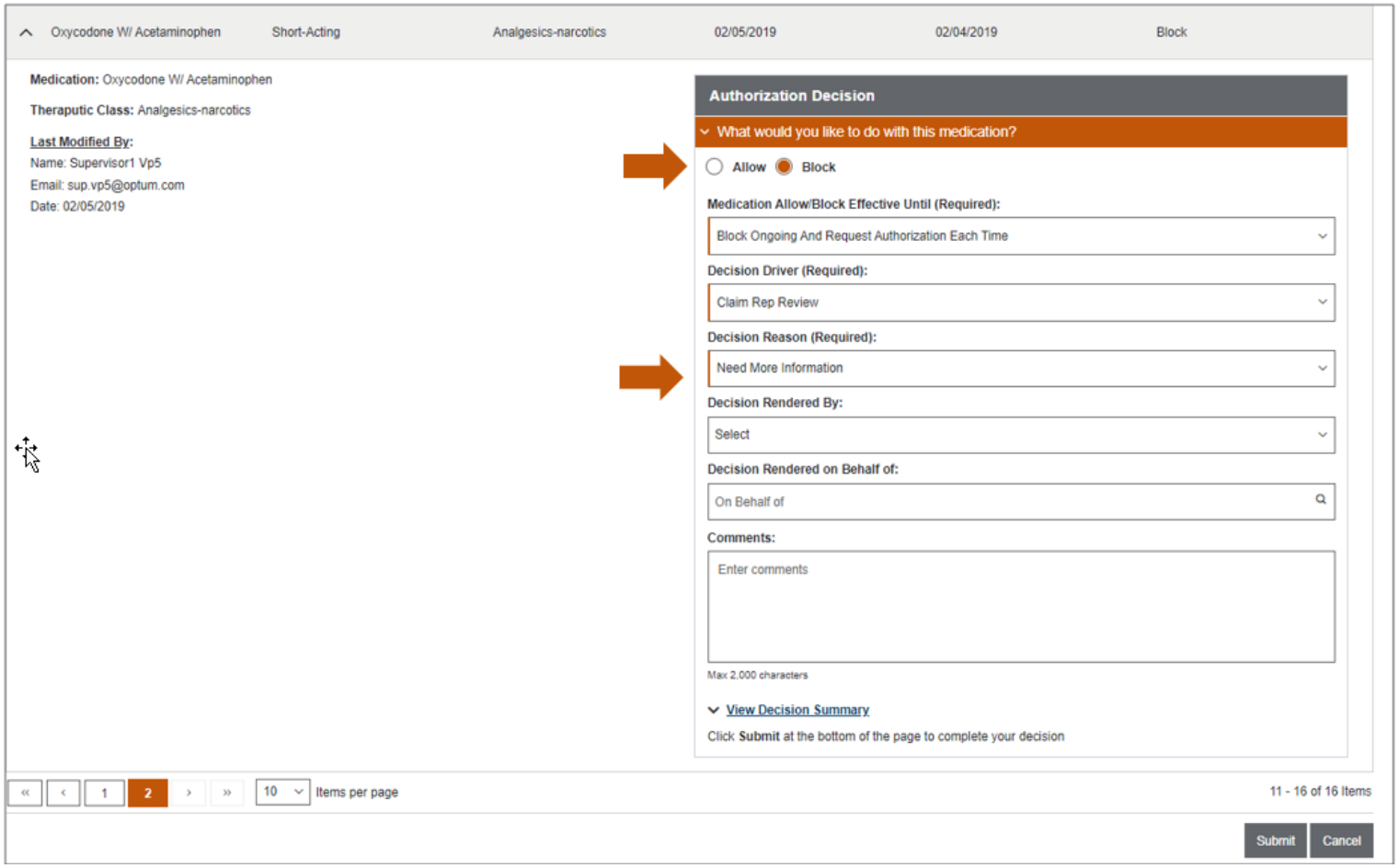
Modify specific medication authorization/restrictions

The existing medication decision will display with information about when the last decision was rendered and the user who entered the decision. This decision can be modified as needed.



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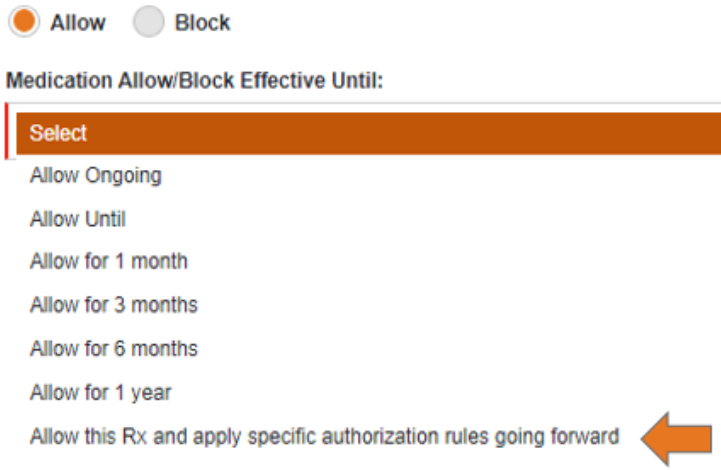
Define specific medication authorization guidelines

Using the Medication Allow/Block Effective Until drop-down, the decision maker can set the timeframe for the decision. They can also select an option to specify detailed authorization rules for the medication.





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Medication Allow/Block Definitions

Allow Options	Outcome
Allow Ongoing	Pending Rx is approved. All future scripts are also approved
Allow Until	Pending Rx is approved. Future scripts are also approved until the end date specified. After the end date any script for the medication should be sent for authorization
Allow for X months/year	Pending Rx is approved. Future scripts are also approved until the end date specified. After the end date any script for the medication should be sent for authorization
Allow Rx and apply specific authorization rules going forward	Pending Rx is approved. Future scripts have limited approval based on the criteria defined

Block Options	Outcome
Block Ongoing	Pending Rx is denied. All future scripts are also denied and should be sent for authorization
Block Until	Pending Rx is denied. Future scripts are also denied until the end date specified. After the end date any script for the medication should be sent for authorization
Block for X months/year and do not request authorization	Pending Rx is denied. Future scripts are also denied until the end date specified. After the end date any script for the medication should be sent for authorization
Block Rx and apply specific authorization rules going forward	Pending Rx is denied. Future scripts have limited approval based on the criteria defined

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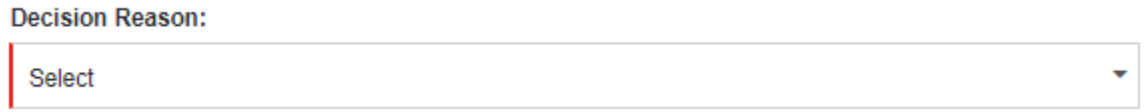
Input general information about the decision

Fill out required and optional (if needed) fields.

Decision Driver – select the Decision Driver that best explains the process for making this decision. Note, this may impact future decisions.



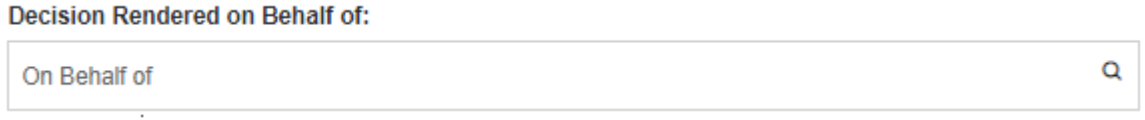
Decision Reason – select a reason that best explains your reasoning for making this decision.



Decision Rendered By – select a value that best explains which user group is making the decision.



Decision Rendered on Behalf of (Optional) – search for a user that you are making this decision for (if applicable).



Examples

Decision Driver

- Claim Rep review
- DOL policy
- Medical Necessity Review
- Optum recommendation
- Utilization review

Decision Reason

- Clinical appropriateness to injury
- Pending outcome of review
- Brand allowed
- Medication is reasonable and necessary for treatment of injury
- Court order

Decision Rendered By

- Nurse
- Optum
- Case owner

Comments (Optional) – Enter comments you would like to be saved with the decision and included in reporting.

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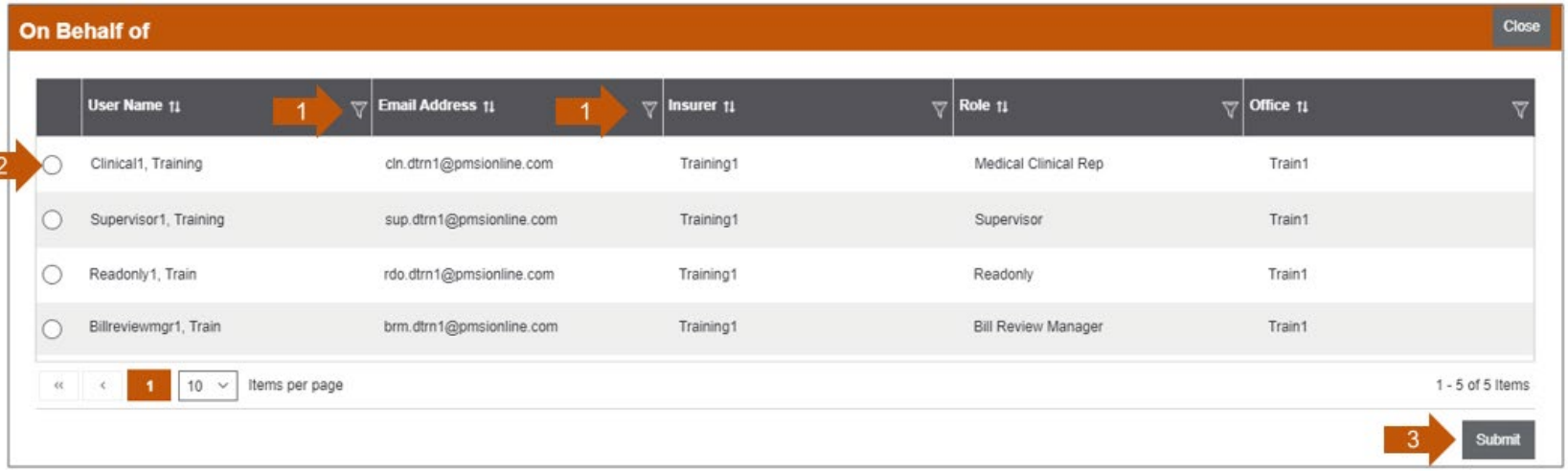
Rendering a decision on behalf of another associate

Selecting the **On Behalf Of** option will bring up a list of associates who have VitalPoint access that you can select. The On Behalf Of decision will be recorded in claim reporting.

NOTE: The On Behalf Of function may not be applicable for all claims examiners.

1. Use the filter icons to sort and filter the lists as needed.
2. Select the radio button next to the user you are making a decision on behalf of
3. Click Submit.



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Enter additional text commentary about decision

- Comments are not required when rendering a decision.
- Comments are available for review in any of the decision history reports within VitalPoint.
- Maximum character limit is 2,000 characters

NOTE: Comments are for reference to help aid with context of decision. It should not be assumed that Optum will take any action from comment instructions submitted with the decision.

Comments:

Enter comments

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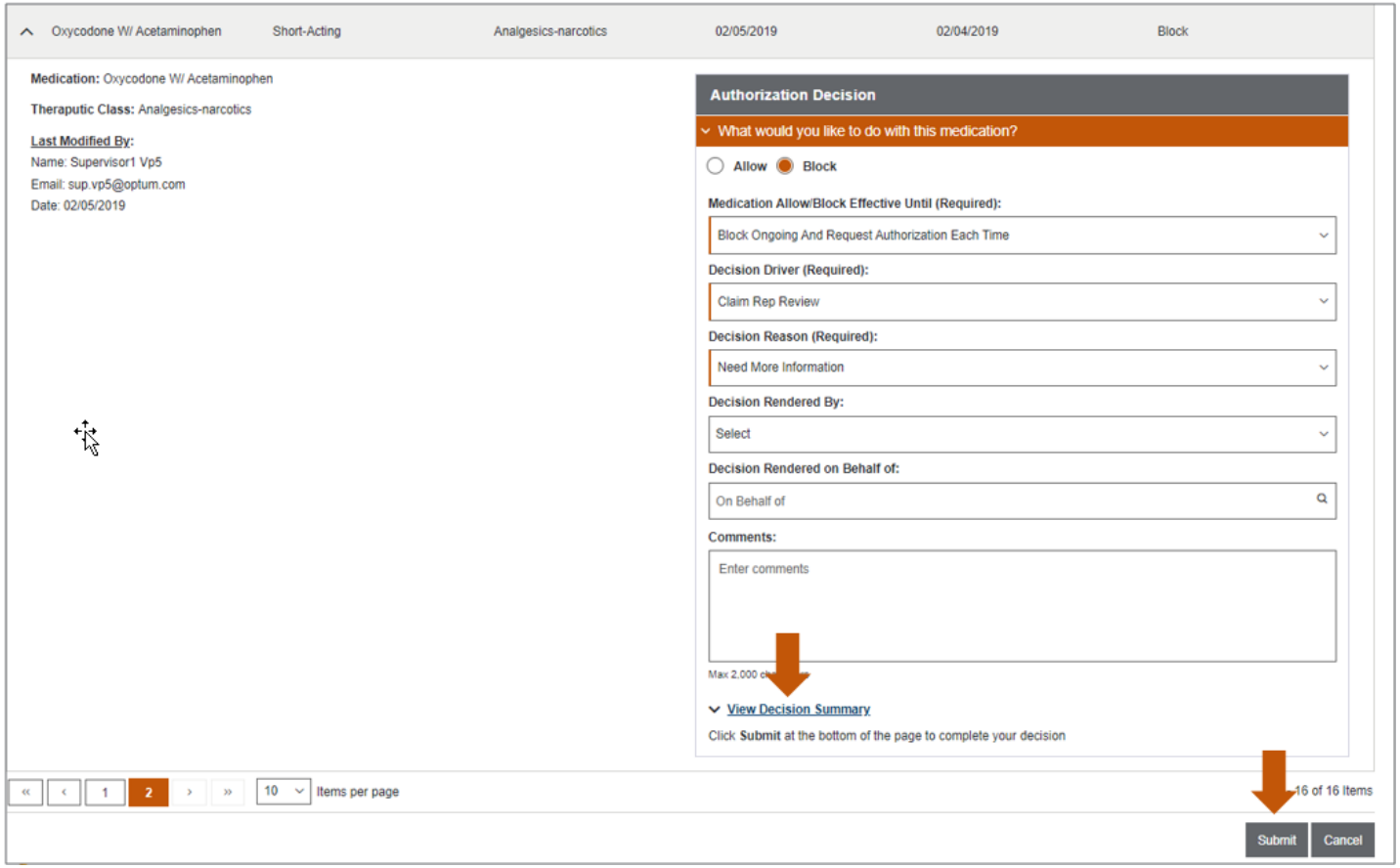
Review Decision

Before submitting, select **View Decision Summary** to review the decision. When finished, click the Submit button.



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Medication authorization restrictions: Advanced capabilities

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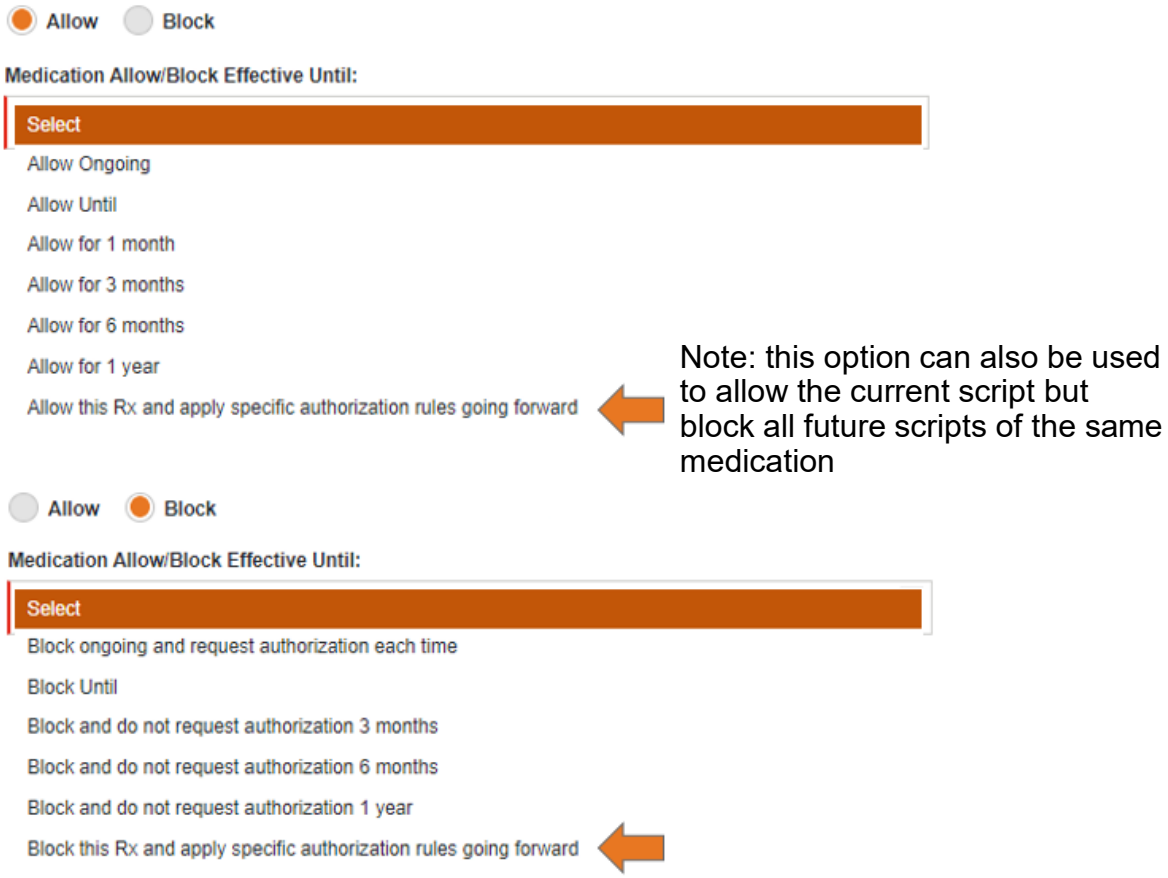
Define specific medication authorization guidelines

When managing the medication, the decision maker can set detailed rules for how Optum should process future scripts of the medication. Do this by choosing “Allow this Rx and apply specific authorization rules going forward” or “Block this Rx and apply specific authorization rules going forward” in the Medication Allow/Block Effective Until drop-down.



Note: this option can also be used to allow the current script but block all future scripts of the same medication

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Follow the decision wizard

Follow the step by step by step instructions to define authorization limitations for the medication going forward

1. > What would you like to do with future prescriptions of this medication?

Define if the medication should be allowed or blocked going forward and if allowed what are the restrictions/limitations such as cost, daily allowance, days' supply , etc.

2. > How long are the restrictions in effect?

Define for how long Optum should enforce the restrictions/limitations identified in Step 1 before additional scripts should be re-reviewed/ sent for authorization

3. > What should Optum do if claimant prescribed restricted medication during effective period?

Define if Optum should send prescriptions for authorization if the prescription is outside the guidelines defined in Step 1 and Step 2



Use the Back, Next, and Reset buttons as you advance through the decision wizard

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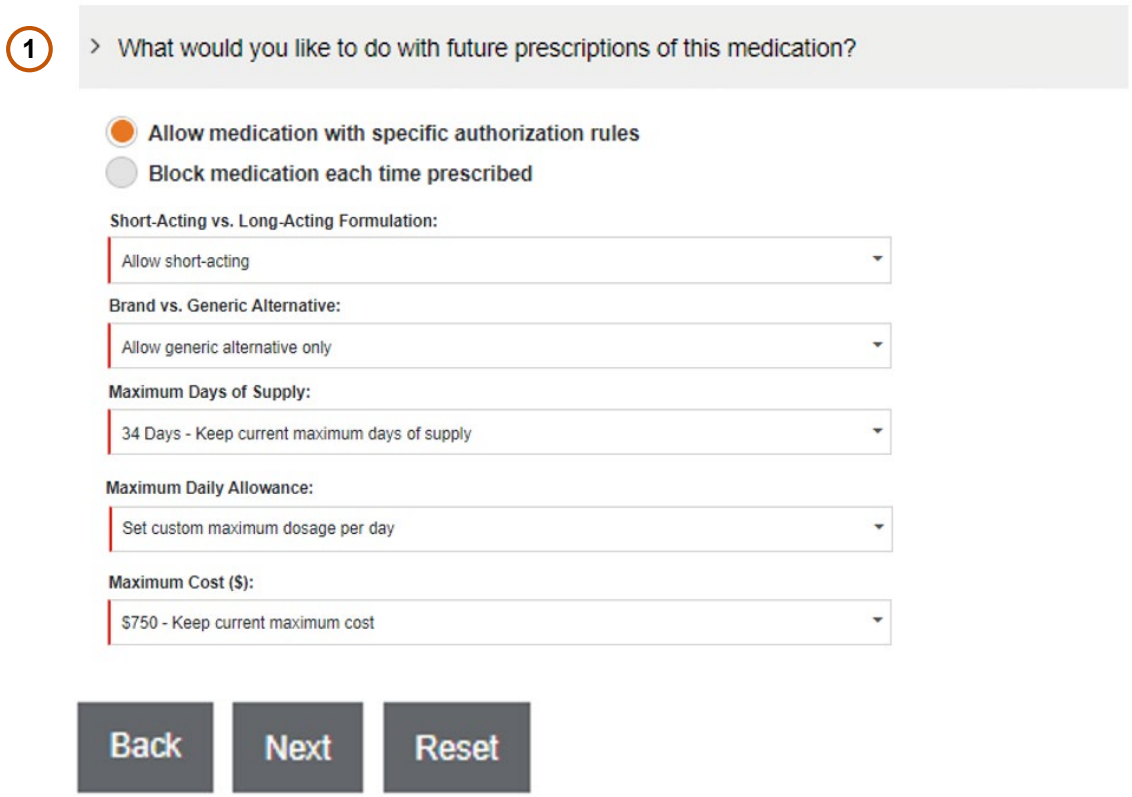
What would you like to do with future prescriptions of this medication

Define if the medication should be allowed or blocked going forward and if allowed what are the restrictions/limitations such as cost, daily allowance, days of supply, etc.



Use the Back, Next, and Reset buttons as you advance through the decision wizard

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What would you like to do with future prescriptions of this medication

Restrict prescriptions to Shorting-Acting vs. Long-Acting Opioid Formulation



Short-Acting vs Long Acting

- Displays only if medication comes in different formulations
- If there are no active medication rules on file about formulation restrictions:
  - Selection defaults to formulation of the prescription
  - Selection defaults to the restrictions on file
- Choose to authorize short-acting, long acting, or all formulations of the medication

NOTE: It is possible that the user does not have permission to override the default value per management instruction. In such cases the user can view the current rule but cannot select another option from the drop down.

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What would you like to do with future prescriptions of this medication

Restrict prescriptions to brand vs. generic



Brand vs. Generic Alternative

- Displays only if medication does not come in generic form
- If there are no active medication rules on file about brand vs. generic restrictions:
  - Selection defaults to the prescription
  - Selection defaults to the restrictions on file
- Choose to authorize generic version only or both brand and generic versions of the medication.

NOTE: It is possible that the user does not have permission to override the default value per management instruction. In such cases the user can view the current rule but cannot select another option from the drop down.

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What would you like to do with future prescriptions of this medication

Restrict the prescription maximum days of supply



Maximum Days of Supply

- If there are no active medication rules on file about maximum day supply restrictions:
  - Selection defaults to the prescription
  - Selection defaults to the restrictions on file
- Choose to override the maximum day supply for the medication but cannot exceed program thresholds defined by management

NOTE: It is possible that the user does not have permission to override the default value per management instruction. In such cases the user can view the current rule but cannot select another option from the drop down.

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What would you like to do with future prescriptions of this medication

Restrict the prescription maximum daily allowance



Maximum Daily Allowance

- If there are no active medication rules on file about maximum daily allowance restrictions:
  - Selection defaults to the prescription
  - Selection defaults to the restrictions on file
- Choose to override the maximum daily allowance for the medication but you cannot exceed program thresholds defined by management
- Depending on medication type the maximum daily allowance is defined by:
  - Compounded medications: Quantity per day
  - Combo medications: Quantity per day
  - Other medication: Dosage per day

NOTE: It is possible that the user does not have permission to override the default value per management instruction. In such cases the user can view the current rule but cannot select another option from the drop down.

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What would you like to do with future prescriptions of this medication

Restrict the prescription maximum cost



Maximum Prescription Cost

- If there are no active medication rules on file about maximum cost restrictions:
  - Selection defaults to the prescription
  - Selection defaults to the restrictions on file
- Choose to override the maximum cost for the medication but you cannot exceed program thresholds defined by management.

NOTE: It is possible that the user does not have permission to override the default value per management instruction. In such cases the user can view the current rule but cannot select another option from the drop down.

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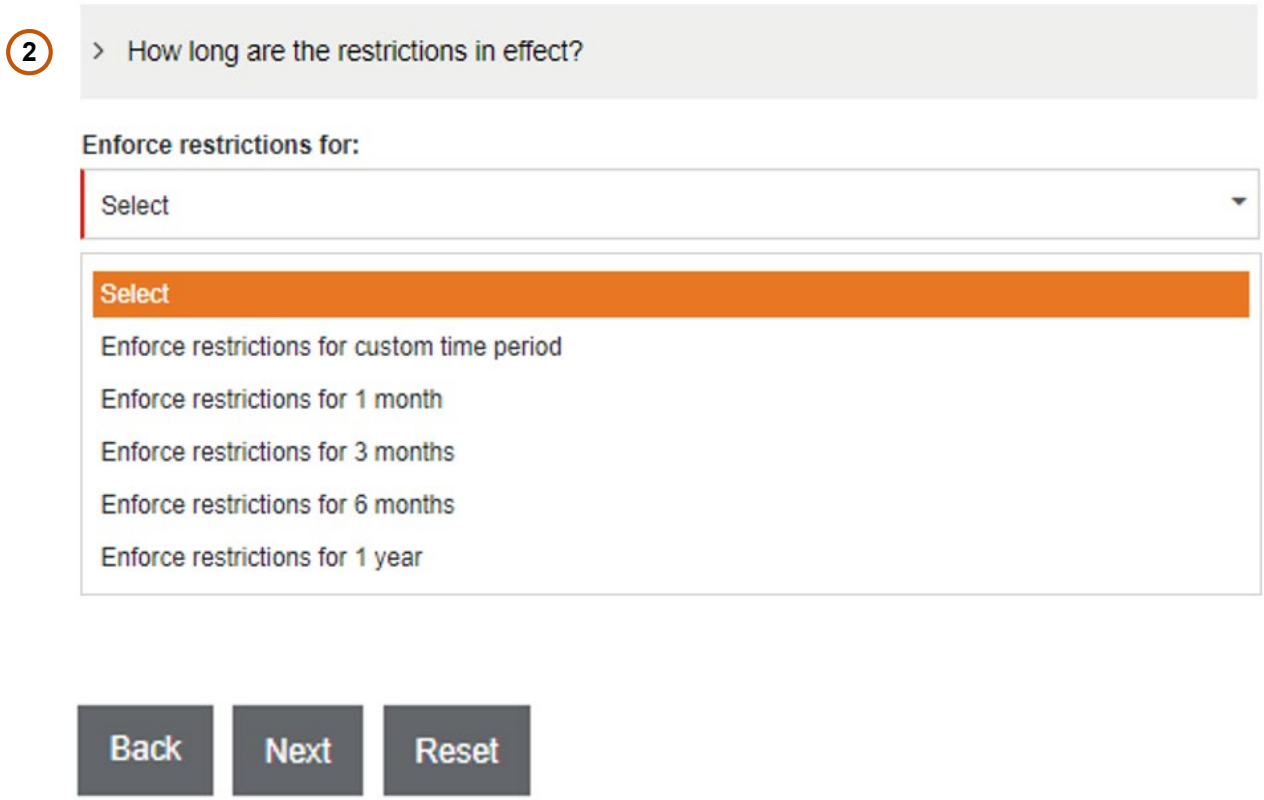
How long are the restrictions in effect

Define for how long Optum should enforce the restrictions/limitations identified in Step 1 before additional scripts should be re-reviewed/ sent for authorization



Use the Back, Next, and Reset buttons as you advance through the decision wizard

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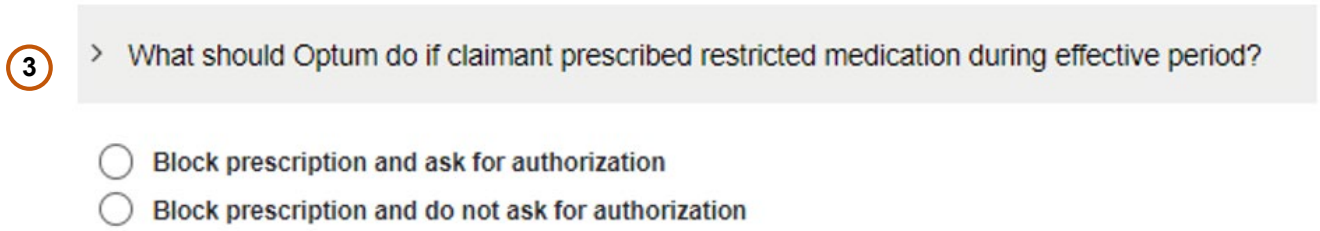
What should Optum do if claimant prescribed restricted medication

Define if Optum should send prescriptions for authorization if the prescription is outside the guidelines defined in Step 1 and Step 2



Decision maker can chose whether to review any prescriptions that are outside the guidelines defined in prior steps or have Optum inform the pharmacy the prescription is denied without prior authorization review.

When you have finished selecting and reviewing your decisions, click the Submit button.

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Add Medication to the Profile

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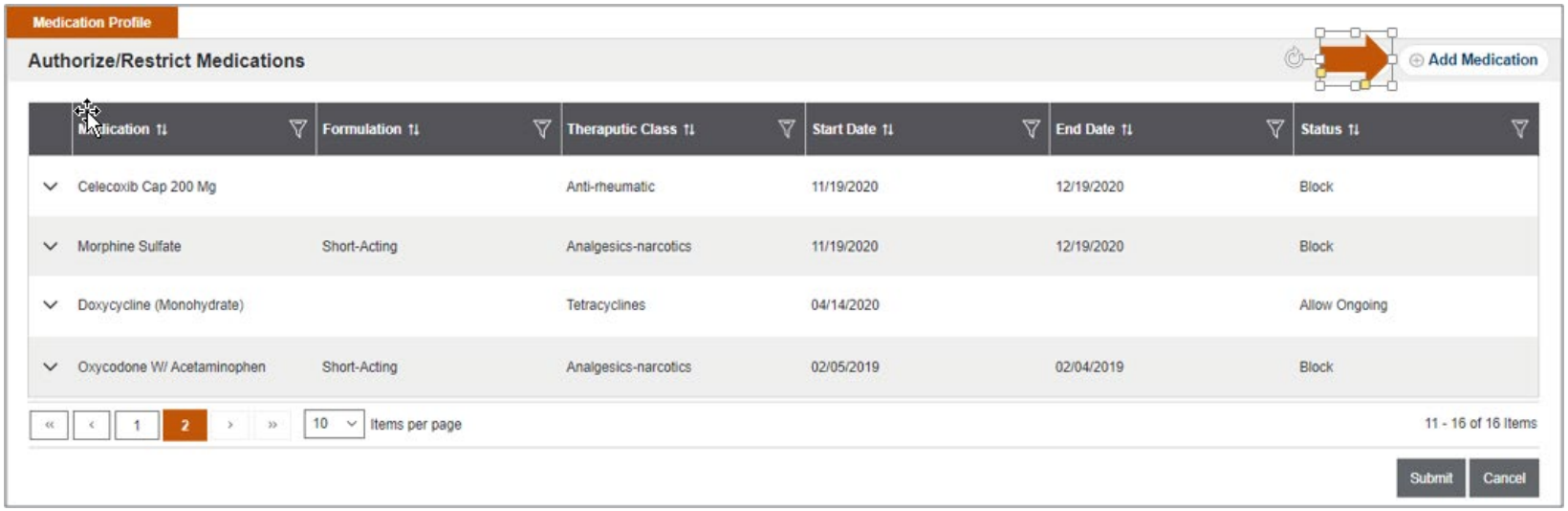
Add a medication to the claimant profile

Click on **Add Medication** to apply a new medication to the claim profile.



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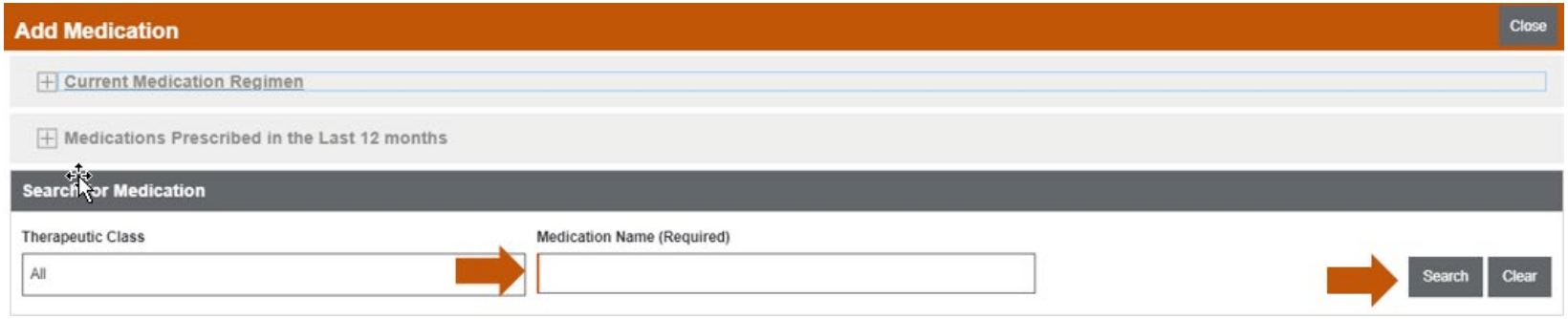
Search for a medication

Search by medication name

1. Enter medication name
2. Click **Search** button



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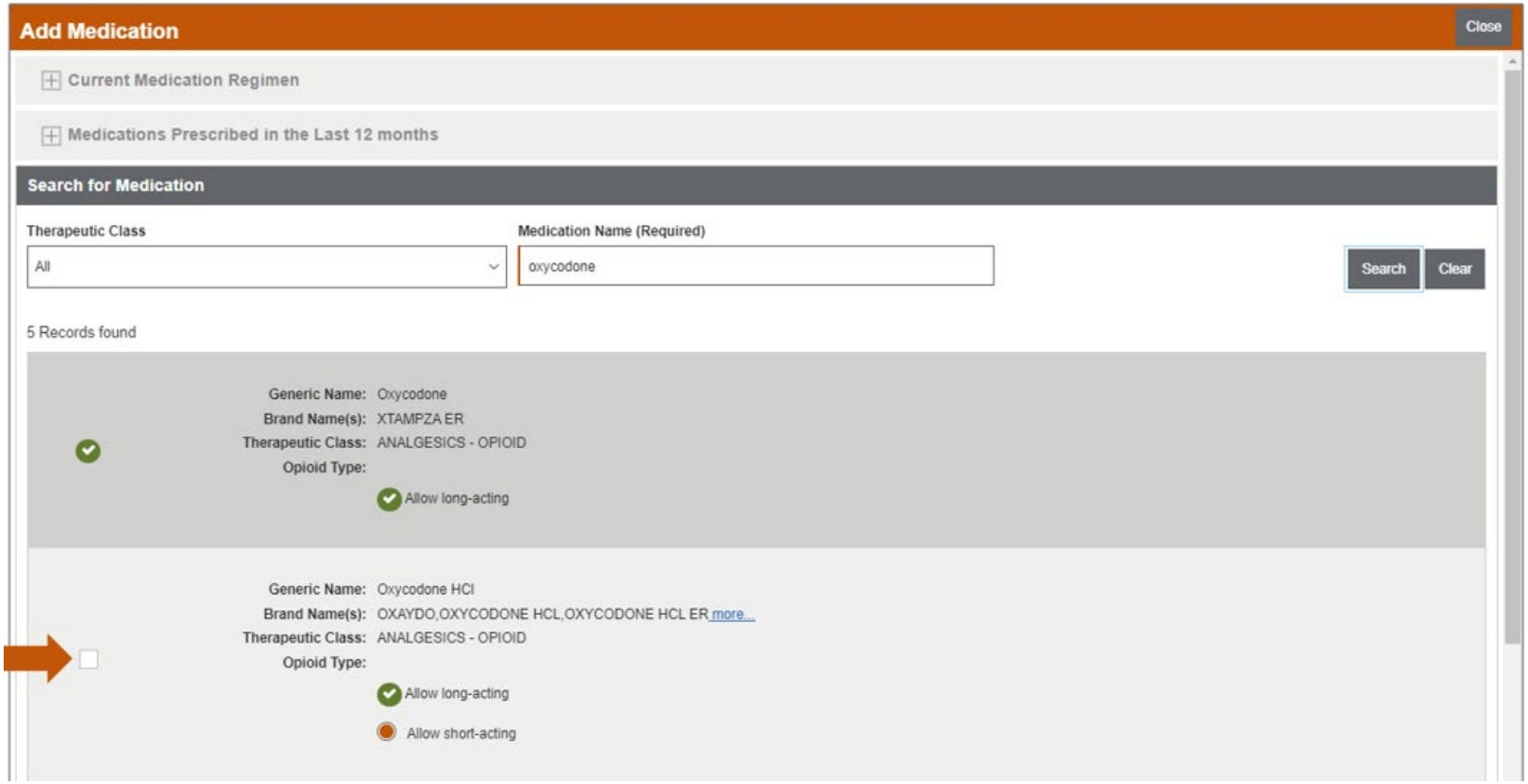
Search for a medication – Select from search results

Select an option to add a medication to the claim profile



Denotes medication already on profile

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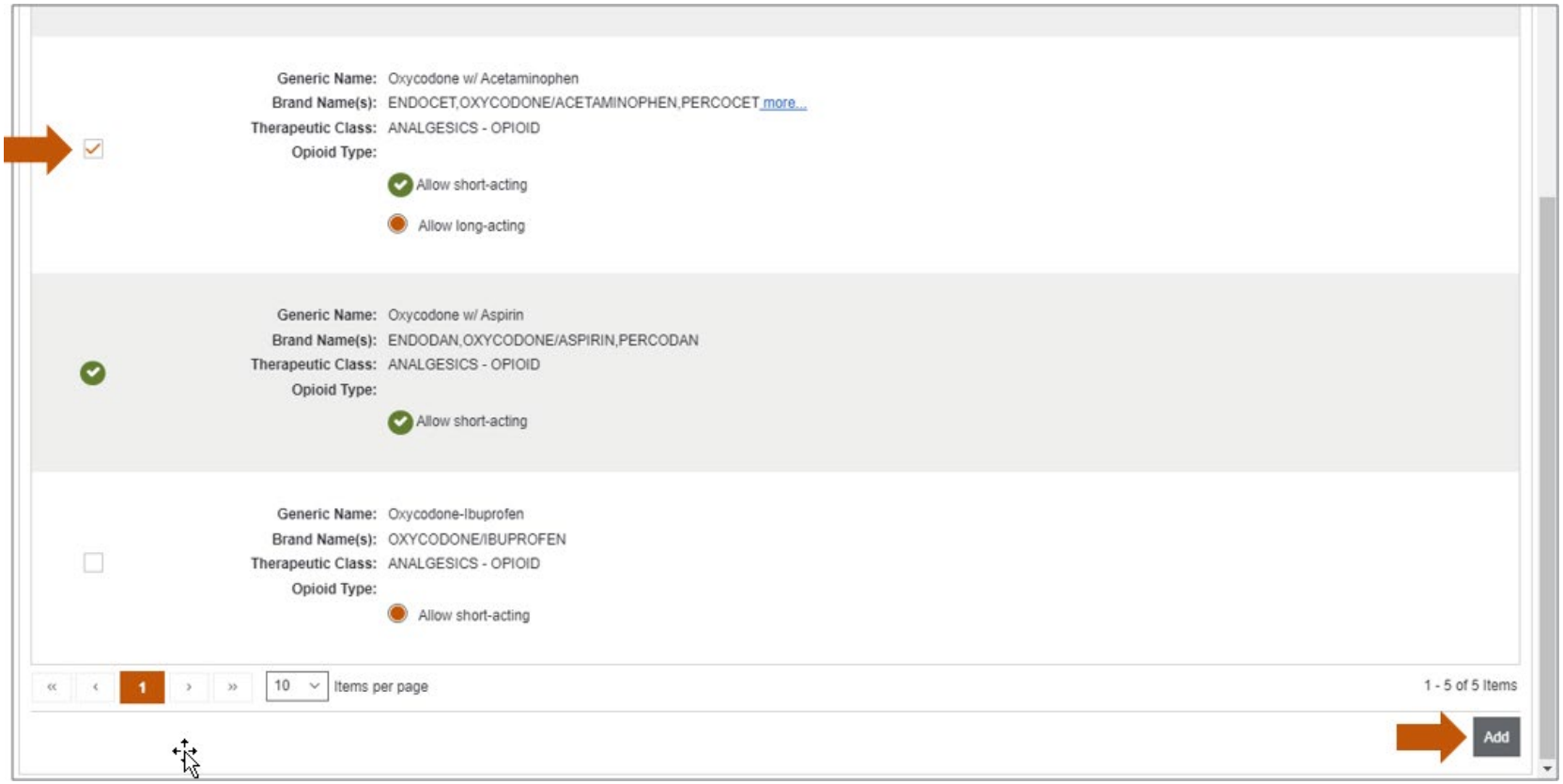
Search for a medication – Select from search results

Select an option to add a medication to the claim profile and select add



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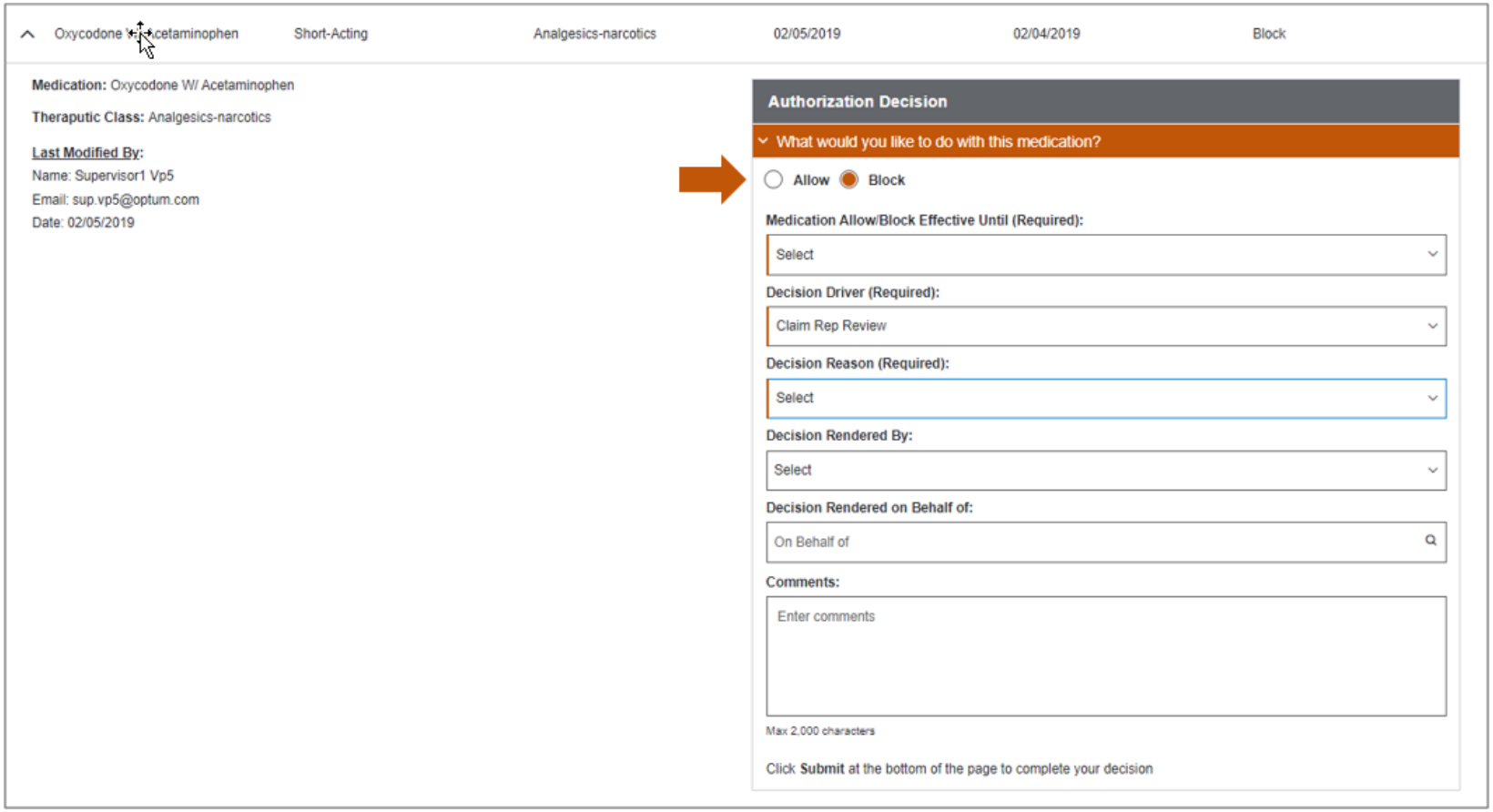
Complete decision

Select an option to Allow or Block the medication on the claim profile, and click Submit.

The “Allow this Rx and apply specific authorization rules going forward” and “Block this Rx and apply specific authorization rules going forward” options are also available in the **Medication Allow/Block Effective Until drop-down** in order to set specific rules for the medication. Use the decision wizard to set the rules, and submit your decision when completed.



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Add Medication to the Profile – Other Options

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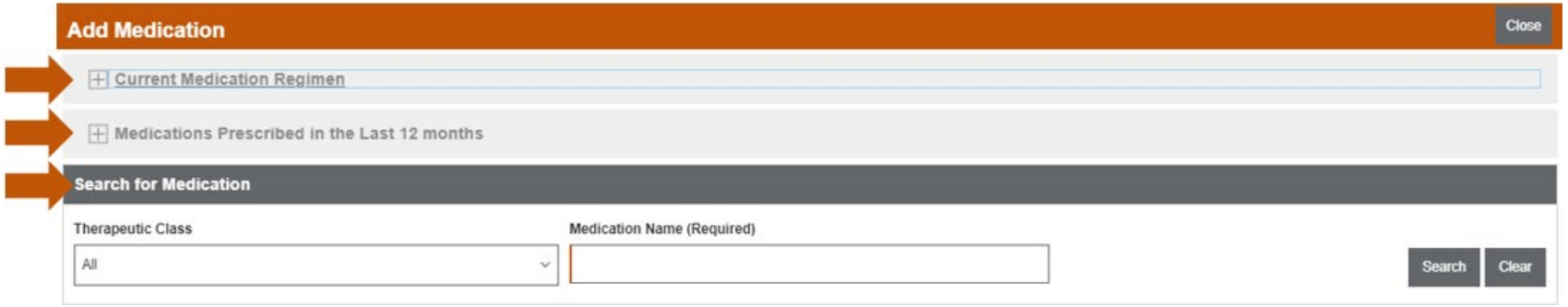
Options to add a medication to the claim profile

Current Medication Regimen– Select from a list of medications claimant currently taking

Medications Prescribed in the Last 12 months– Select from a list of medications claimant has taken in the last 12 months

Search for Medication – search by medication name



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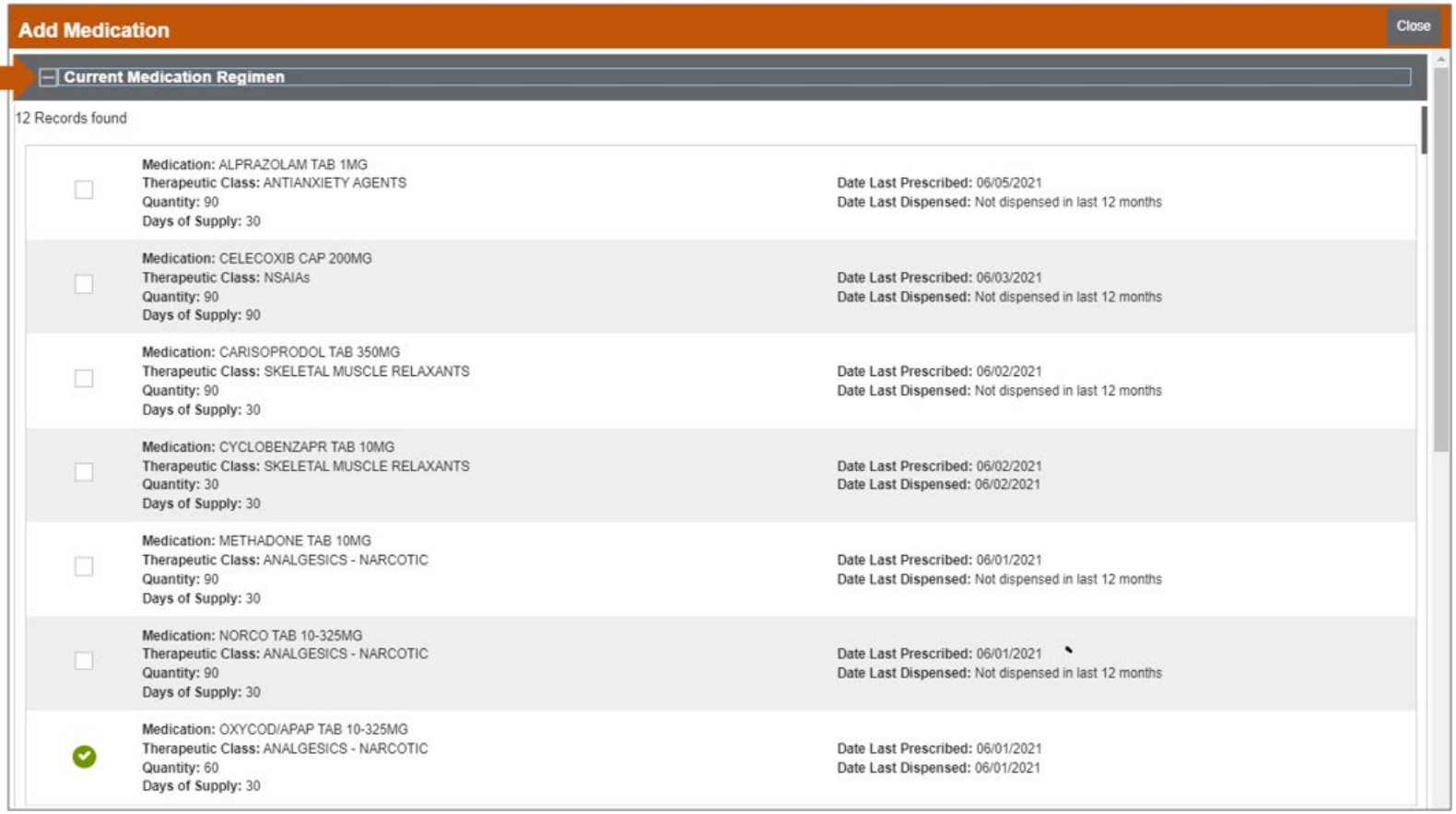
Current Medication Regimen– Select from search results

Select a medication from the current medication regimen



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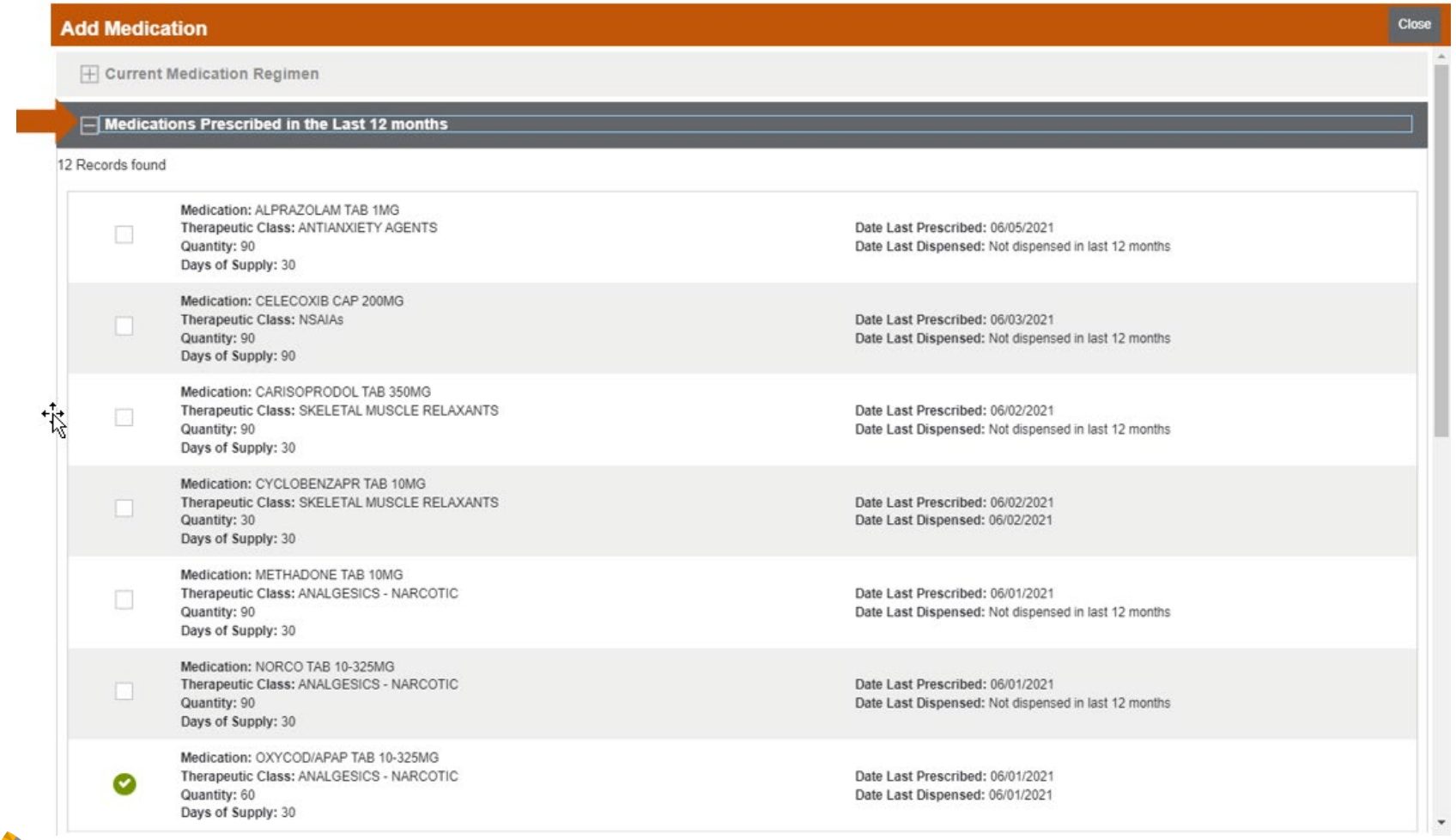
Last 12 Months of Medications – Select from search results

Select a medication from the list of medications taken in the last 12 months



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Authorize/Restrict Physicians

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Current Physician Profile

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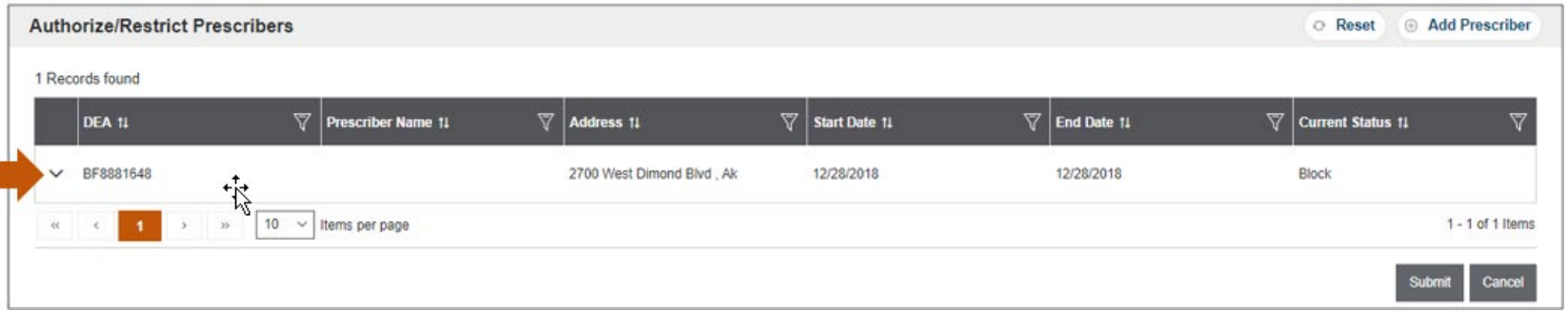
View current physician profile

When a physician has a previous decision on the claim profile, click the **chevron** to expand the decision panel and render any necessary changes.



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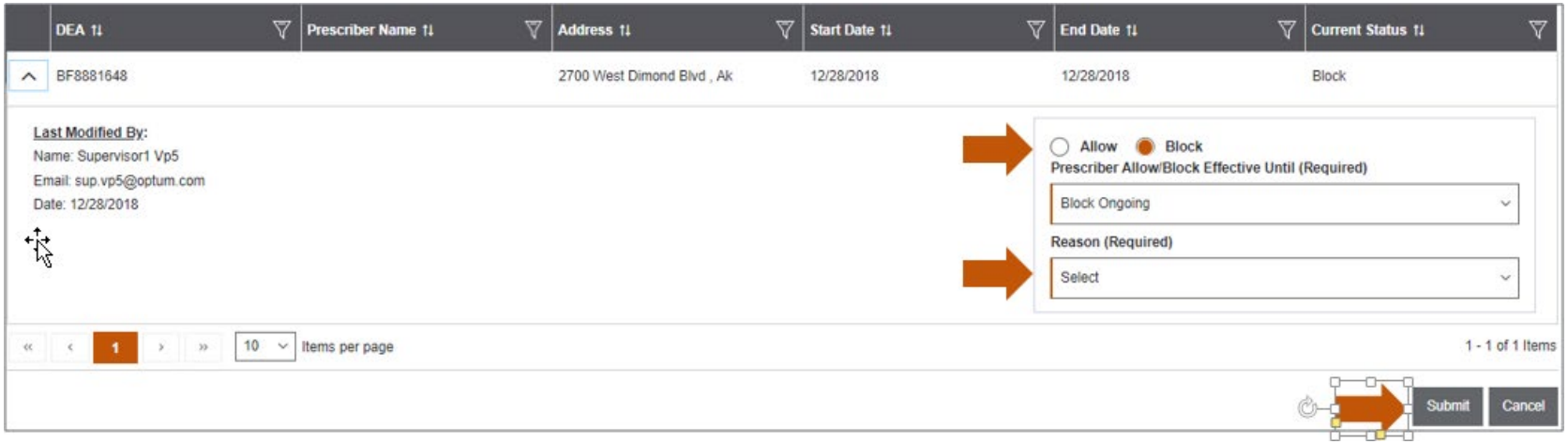
Modify specific physician authorization/restrictions

The existing physician decision will display with information about when the last decision was rendered and the user who entered the decision.



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Add Physician to the Profile

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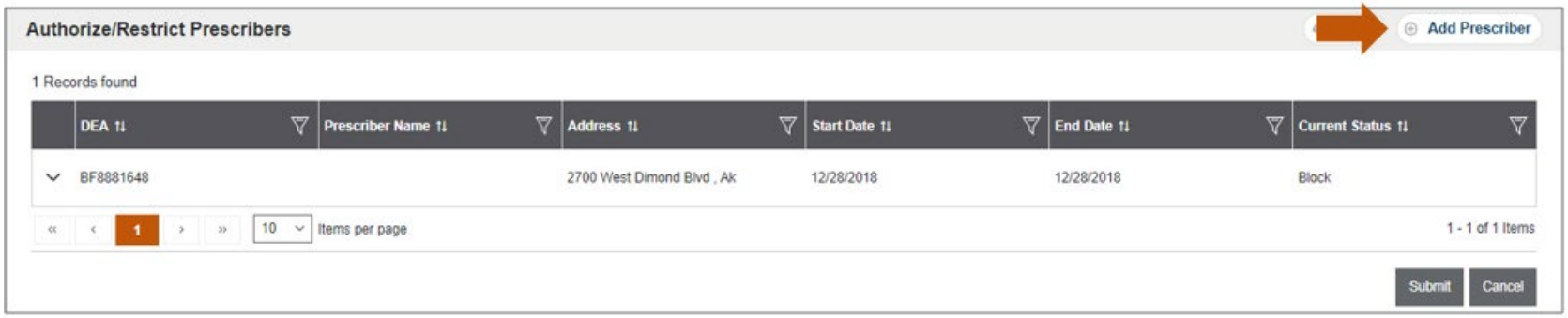
Add a physician to the claimant profile

To make a decision on a prescriber not currently listed on the Physician Profile, click **Add Physician**



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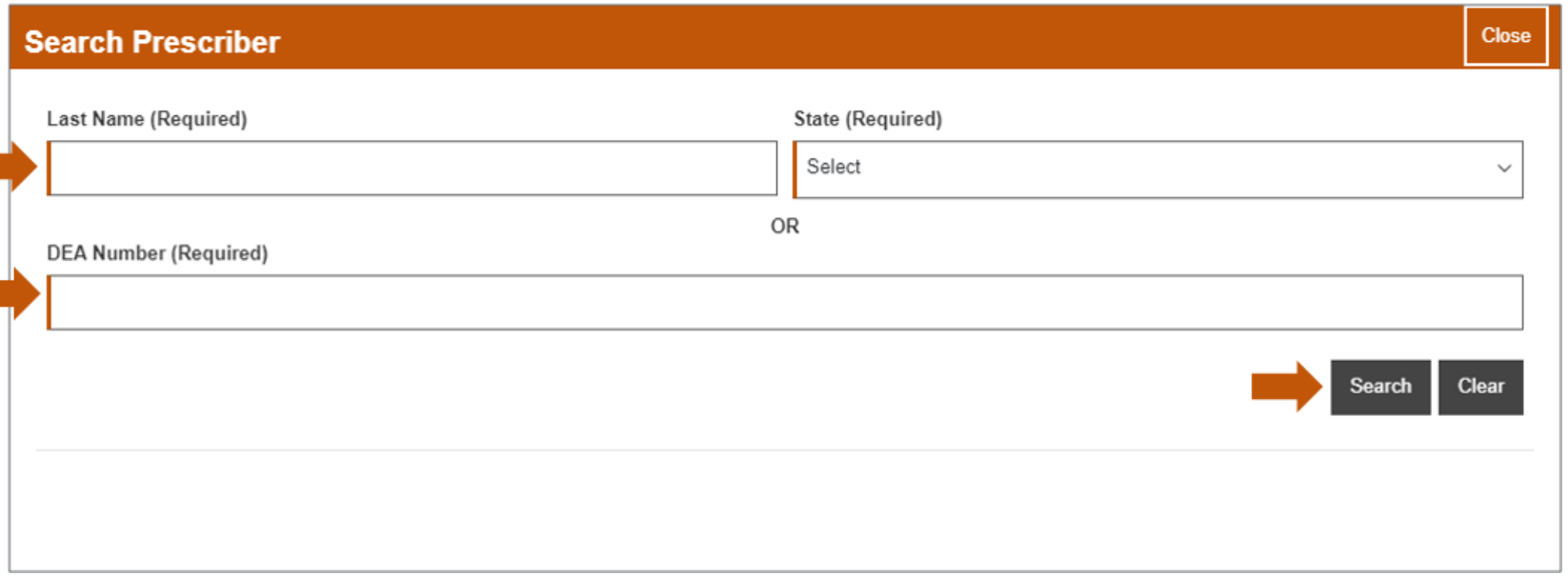
Search for physician

Enter **Last Name** and **State** or **DEA Number** then click **Search** to bring up a list of prescribers.



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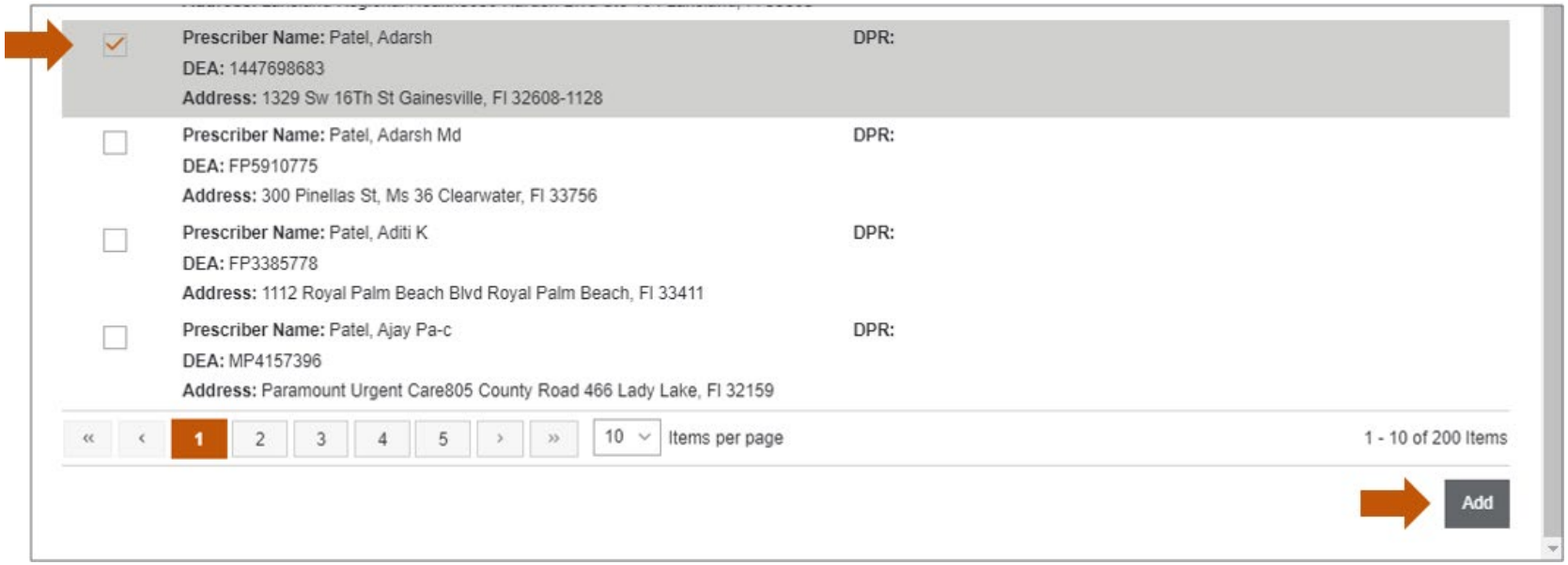
Select a physician from the search results

Click the **checkbox** next to the prescriber you would like to make a decision on, then click **Add.**



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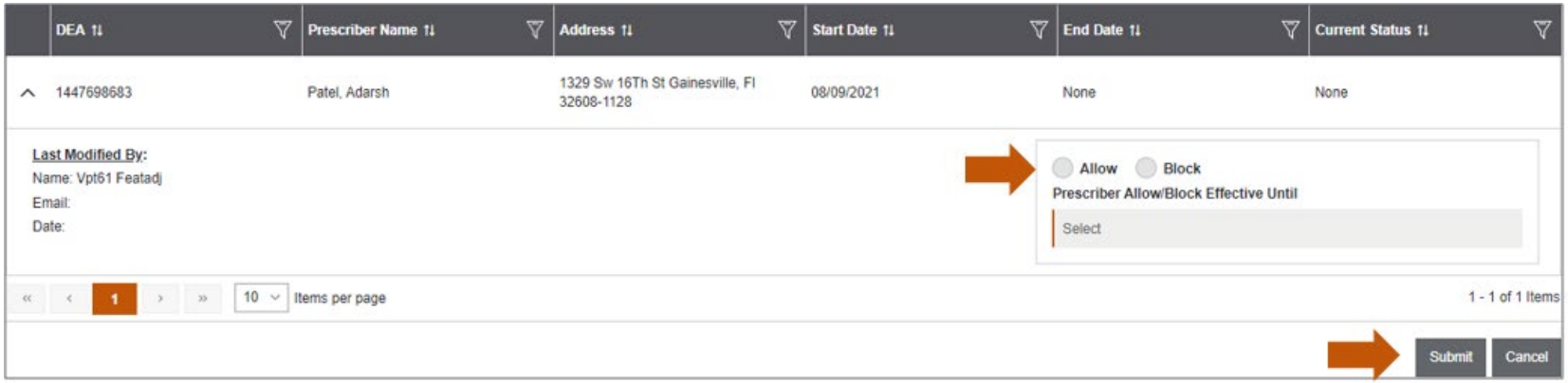
Render a physician authorization/restriction

Render the appropriate **Allow** or **Block** decision, then select an **Allow/Block Effective Until** decision from the dropdown and click **Submit.**



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Request services

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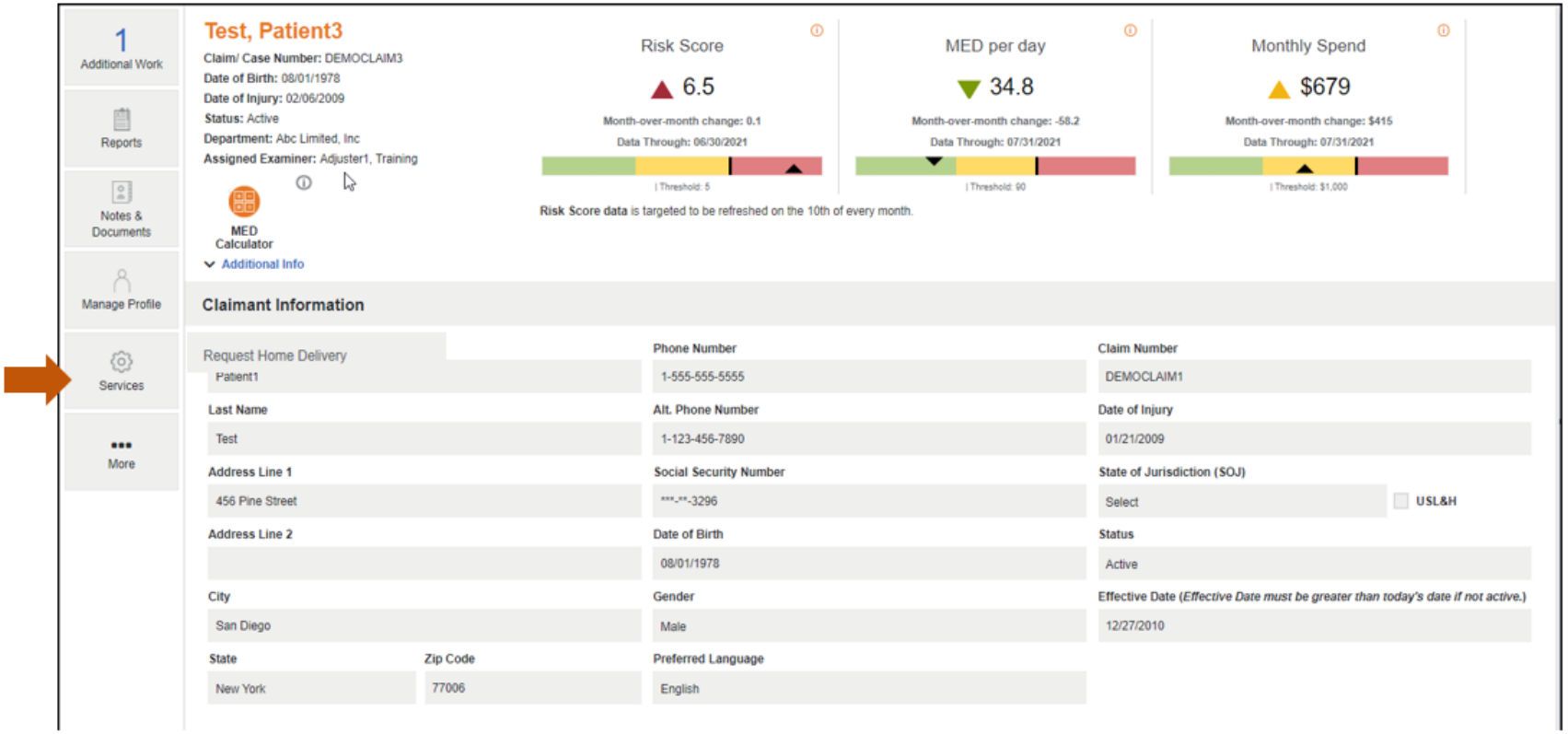
Services menu options

When viewing a claim, the **Services** menu allows you to request a service from Optum.

Request Home Delivery – Allows you to request Home Delivery pharmacy services from Optum.



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Request Home Delivery

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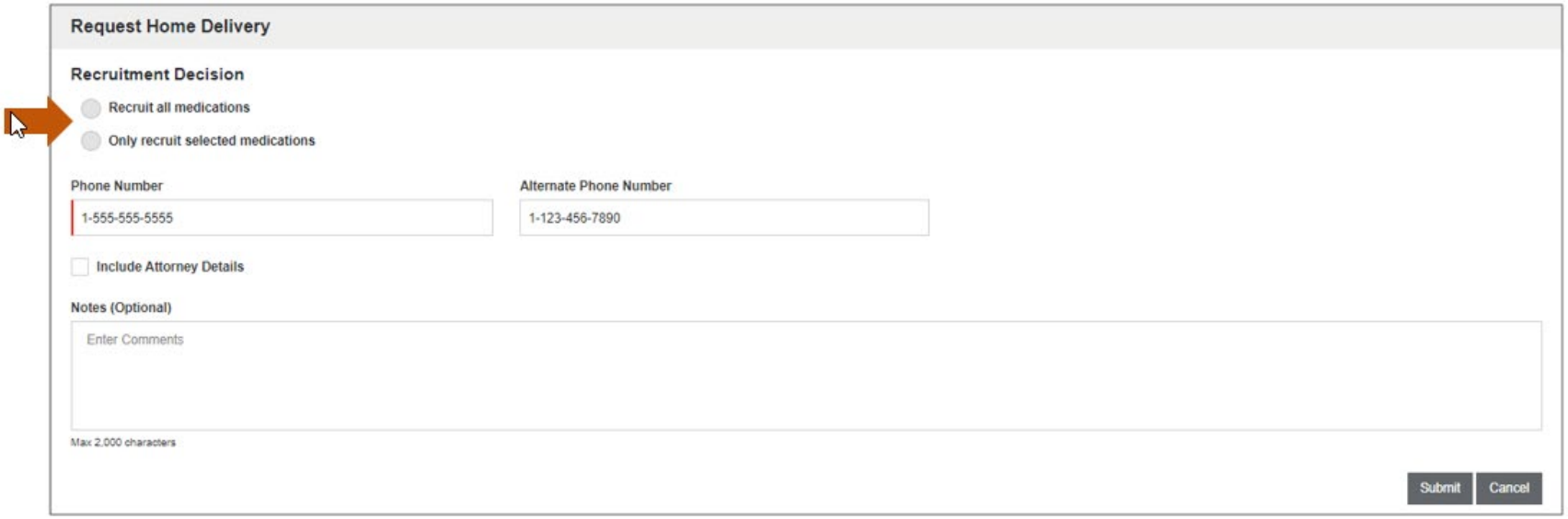
Request Home Delivery – Select recruitment option

Select recruitment option

Recruit all medications: All medications eligible for home delivery will be recruited

Only recruit selected medications: Select the specific medications to recruit from list of medications on record in the last 12 months



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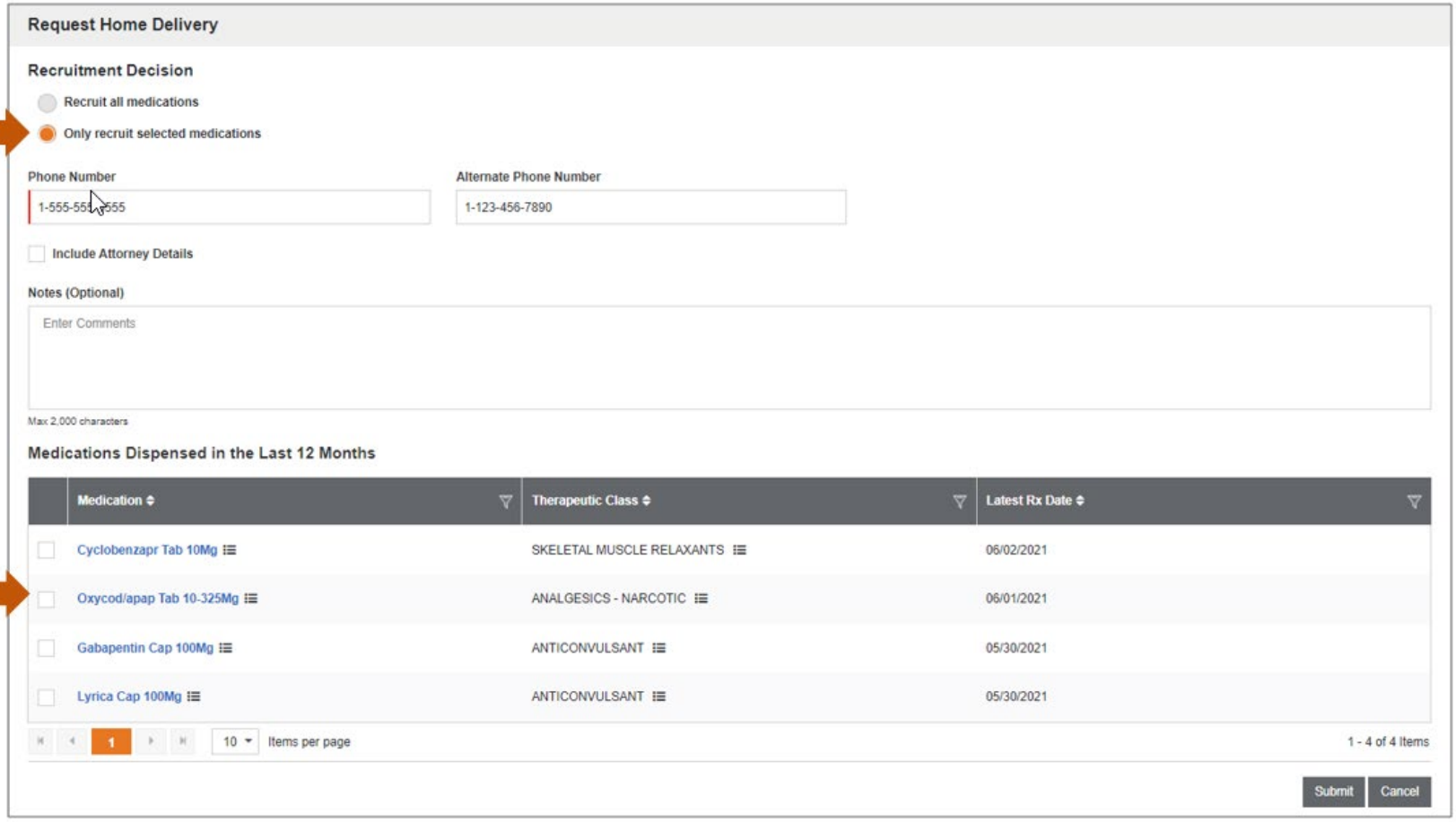
Request Home Delivery – Recruit select medications



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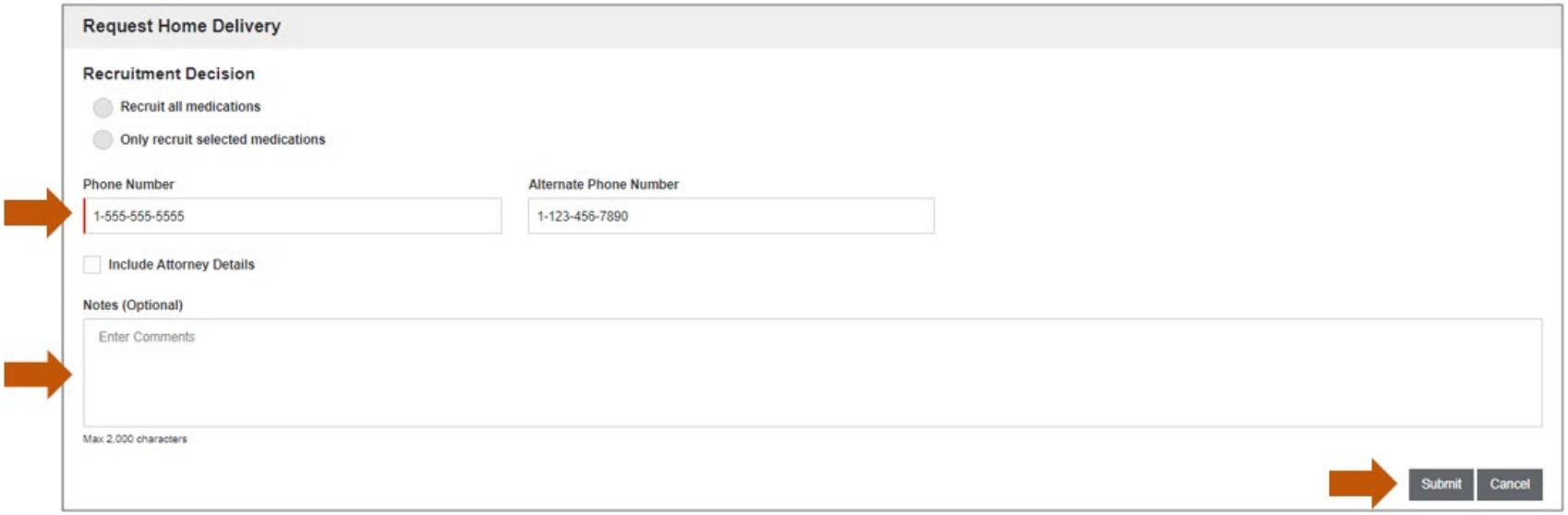
Request Home Delivery – Provide contact and comments

Complete **Phone Number**, enter **Notes** if needed, and click **Submit**.



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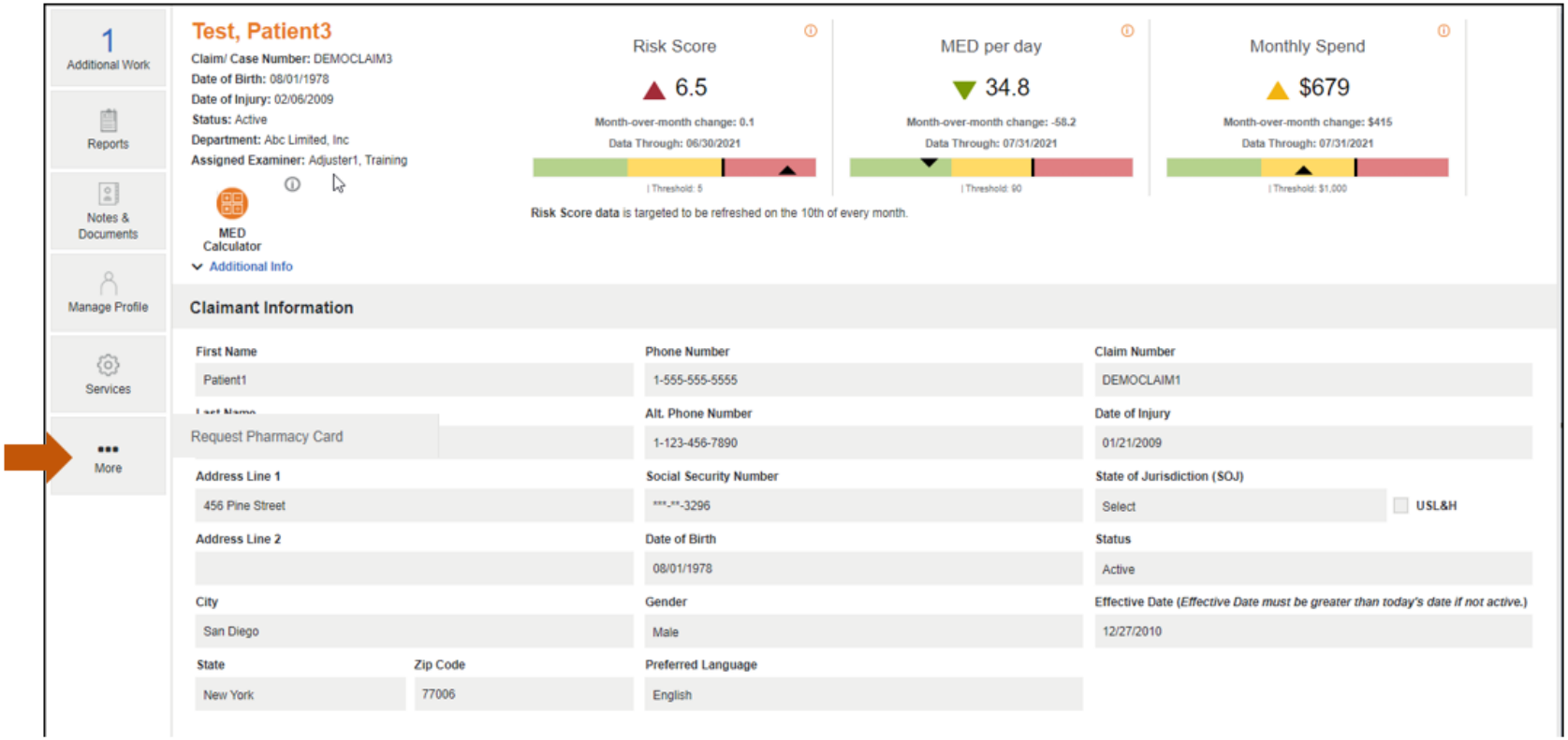
More menu options

The More menu provides the following option:

Request Pharmacy Card – Download, email, or mail an Optum pharmacy card.



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Request Pharmacy Card

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Request Pharmacy Card

Select Card Request Type and Click Submit. Note: Appropriate card will display based on claimant's benefit status—Admin Closure, CA 16, or Standard. Card will not be available to terminated claims.

Send me Email – Soft copy attached to email. Email sent to DOL staff member making request.

Mail Card to Claimant – Request sent to mail physical card to claimant.

Download Card – Soft copy displays on requestor's computer.



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Delegate work

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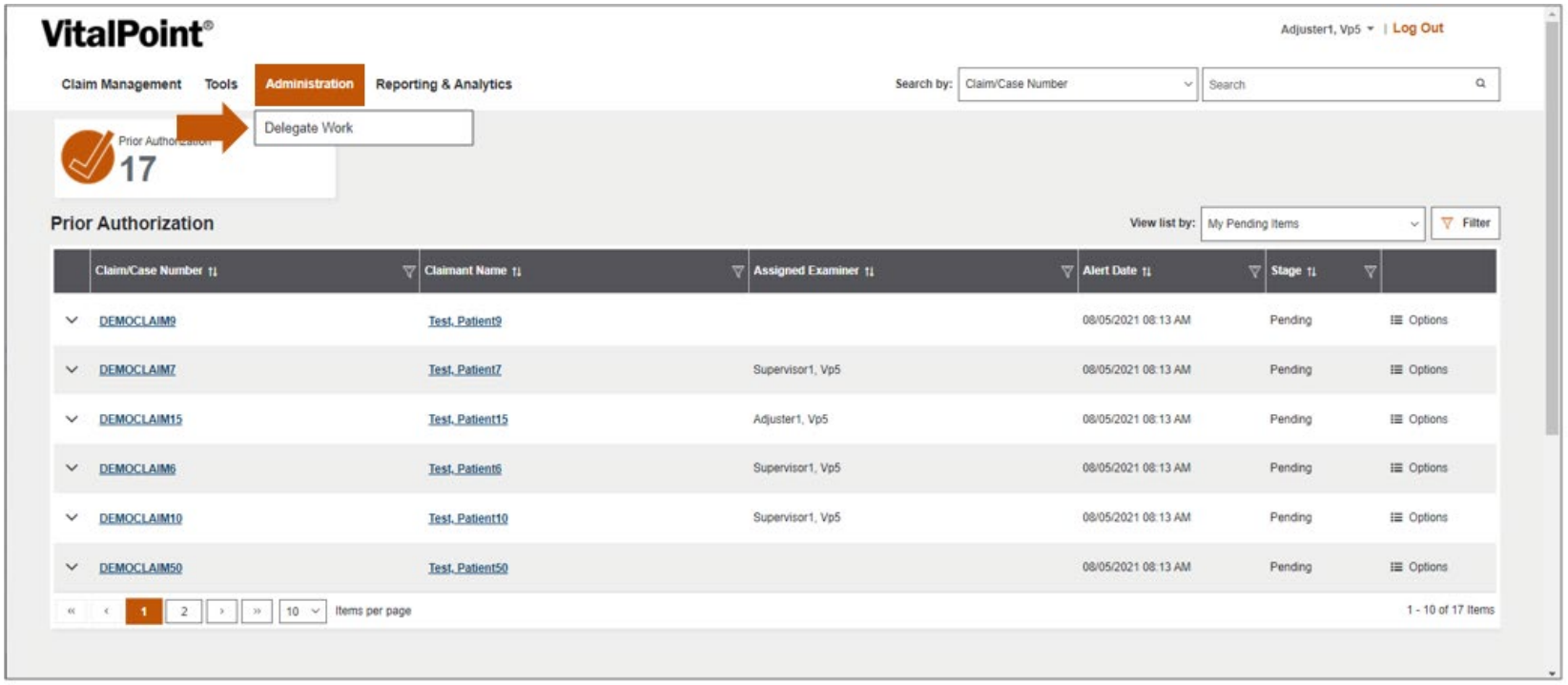
Assign proxy while out of the office

Use **Delegate Work** to **assign future VitalPoint transactions** to another user during the selected delegation period. Delegate Work should be used when there is a known/planned user absence and that user will not be able to take action on work usually assigned to them. Most VitalPoint users can only delegate their own work. VitalPoint Supervisors can delegate work assigned to their team in addition to their own work.

Go to **Administration** in the top menu, then **Delegate Work.**



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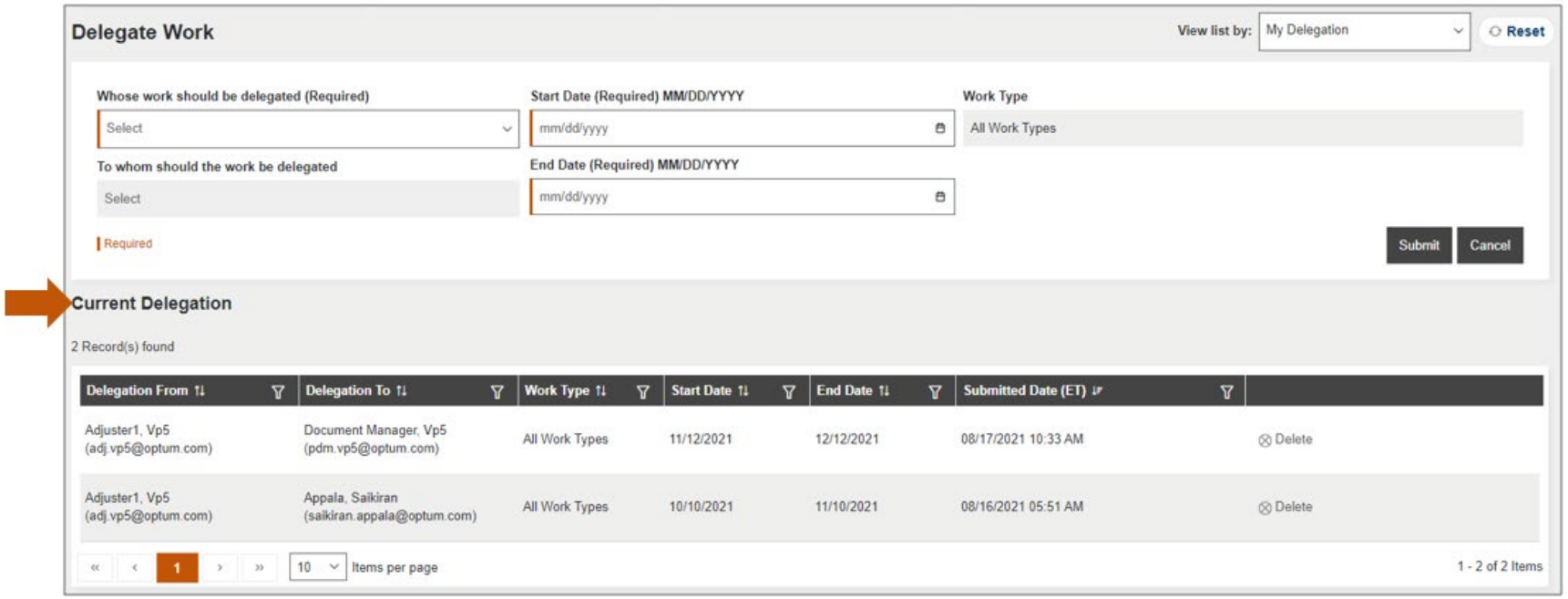
View current delegated work schedule

A list of current delegations will display in the table at the bottom of the screen.



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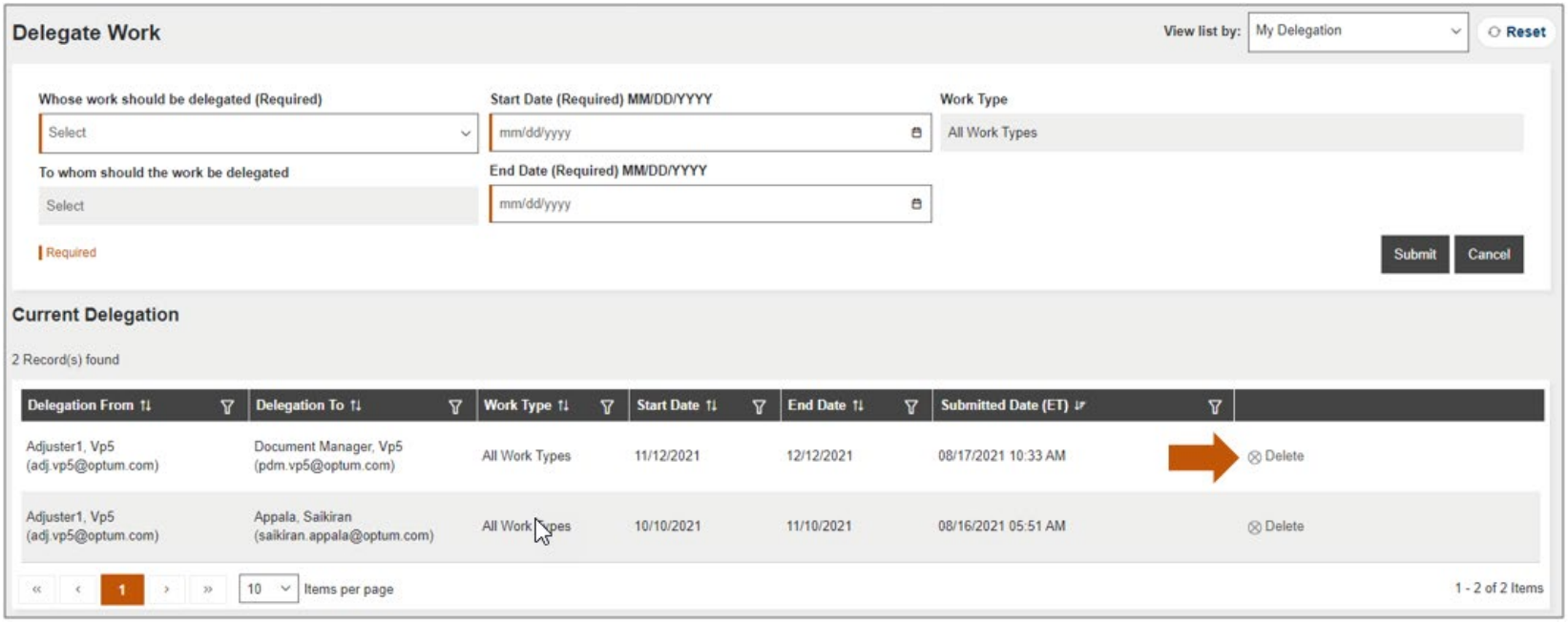
View current delegated work schedule

To stop a work delegation, find the delegated work in the Current delegation list and click **Delete.**



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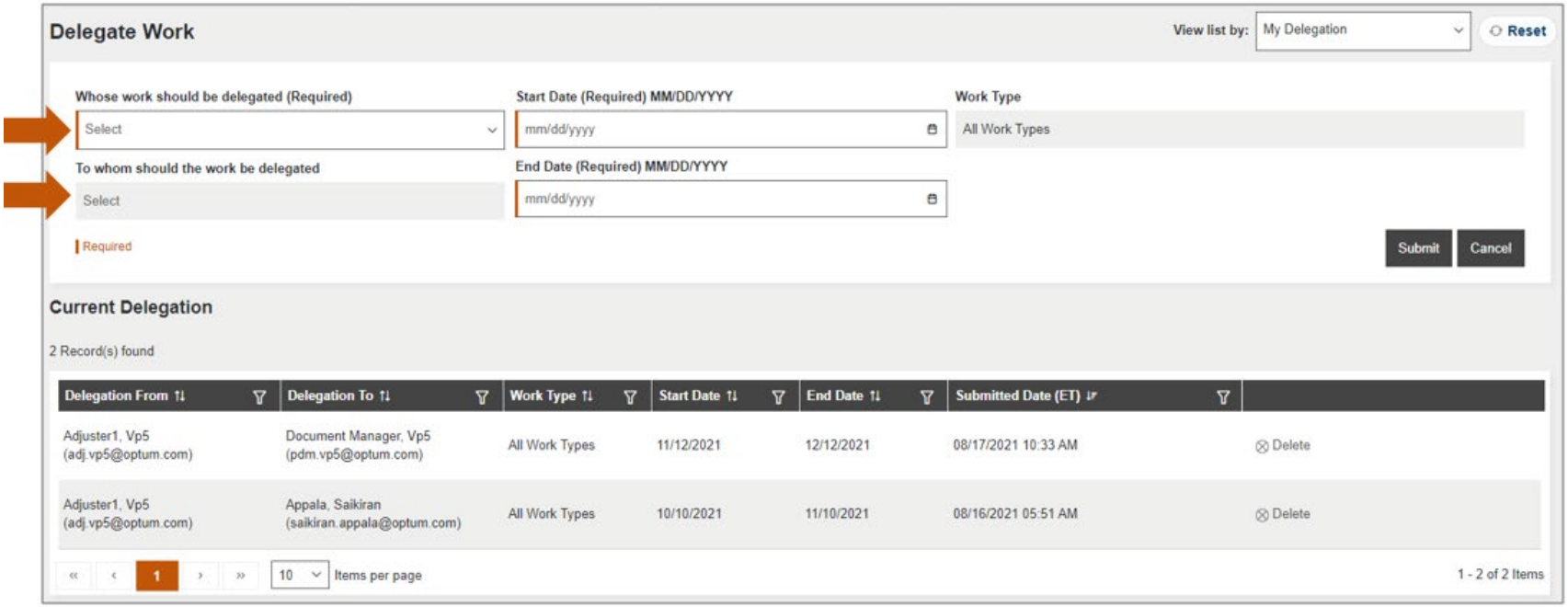
Delegate work to another associate

To begin a **new delegation**, select who you wish to delegate **FUTURE** transactions, using the **Whose work should be delegated** field. Next, select who you wish to delegate **to** using the **To whom should the work be delegated** field.



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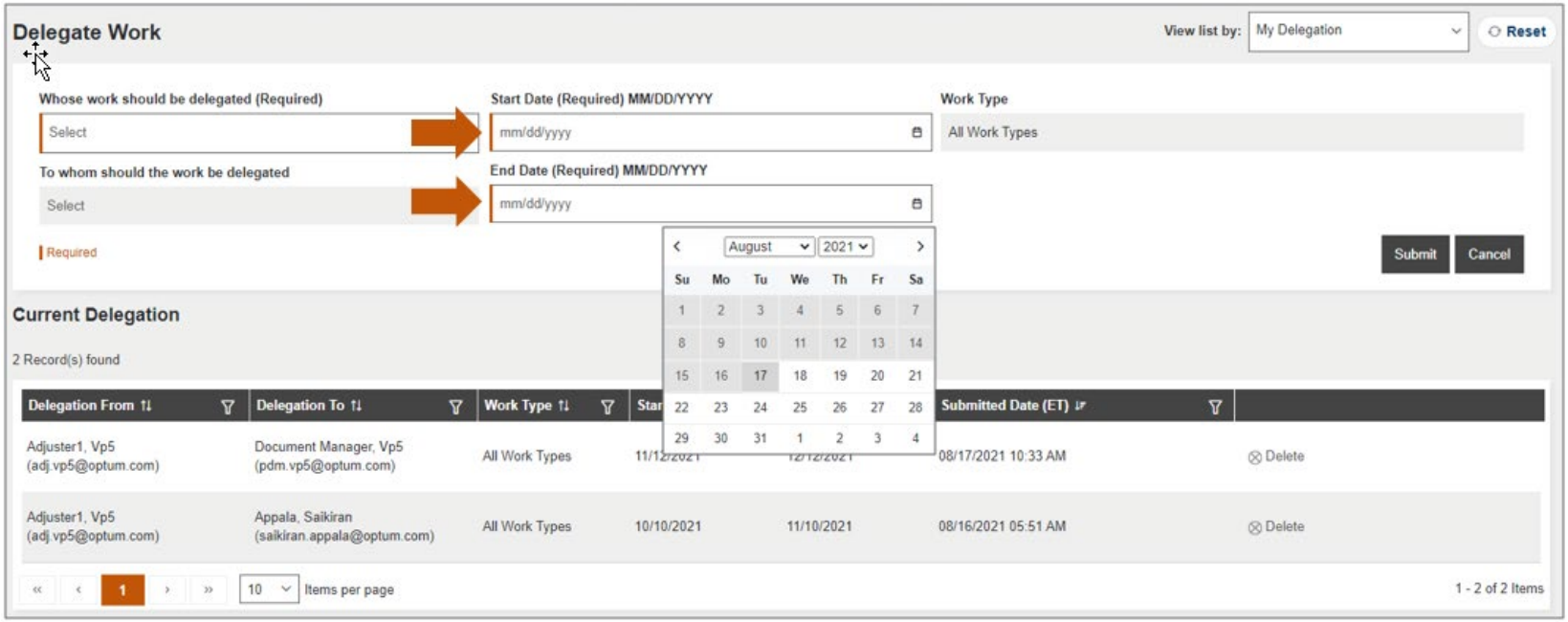
Define when delegation of work should begin and end

1. Use the **Start Date** drop down calendar to select the start date for delegating
2. Use the **End Date** drop down calendar to select the end date for delegating



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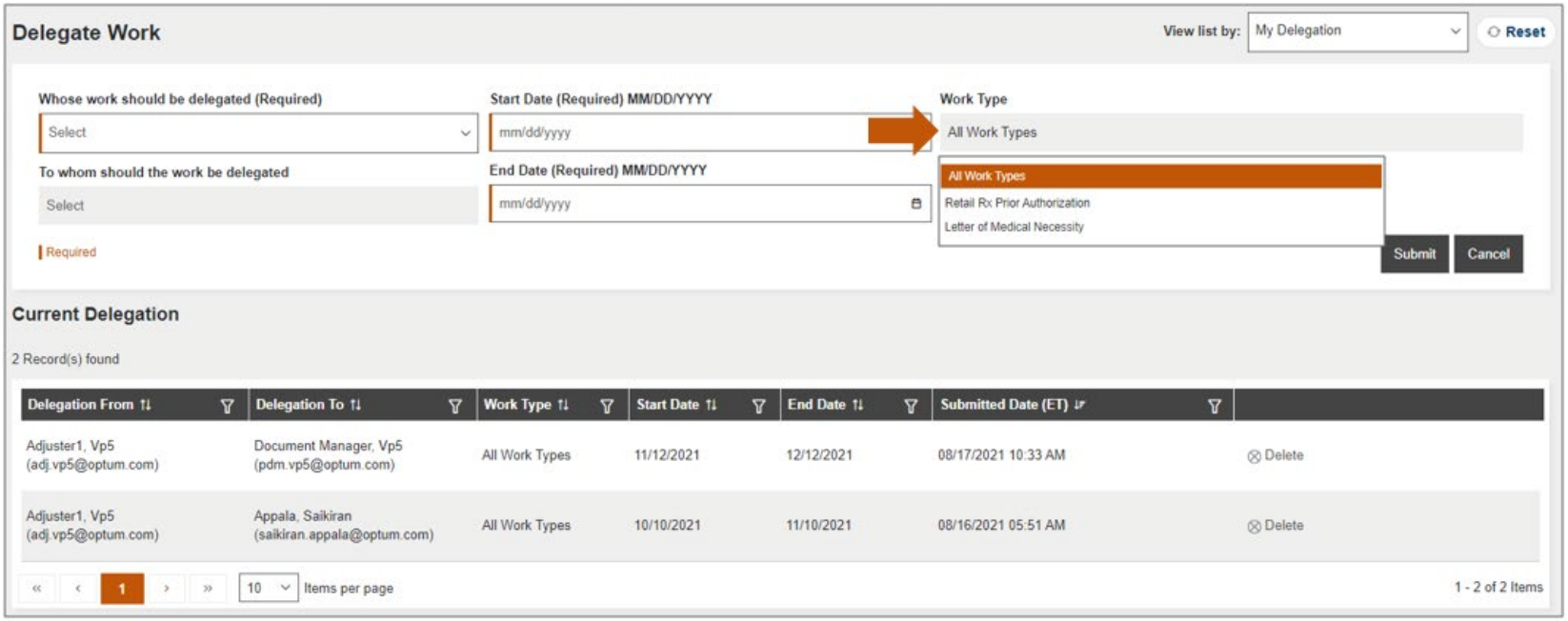
Define the type of work to delegate to associate

1. Select the **Type of Work** that should be delegated
2. Click **Submit**



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Thank you





About Optum Worker's Comp and Auto No-fault Solutions

Optum Workers' Comp and Auto No-Fault Solutions collaborates with clients to lower costs while improving health outcomes for the injured persons we serve. Our comprehensive pharmacy, ancillary, medical services, and settlement solutions, combine data, analytics, and extensive clinical expertise with innovative technology to ensure injured persons receive safe, appropriate and cost-effective care throughout the lifecycle of a claim. For more information, email us at expectmore@optum.com.

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