

Updating payment method user guide

This guide provides a step-by-step process to update your payment method with Optum Pay. If you are moving from virtual card payments to ACH, please be advised that you'll be required to supply banking information and associated documentation. You will continue to receive payments based on your current settings until the new payment method goes into effect. This process may take up to 10 business days.

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Select 'ACH' from Payment Method dropdown to receive payments via direct deposit.

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Once you've made your updates, then select **'Update payment Method(s)'** at bottom of page.

Payer Infor	Payment Method			
Payer Name	Payer Id	Payer Offers	Payment Method	
Patient Payment	HM801	ACH/VCP	VCP V	
Rally Pay Member Payments	RPMP5	ACH/VCP	VCP V	
AARP Supplemental Health Plans insured by UnitedHealthcare	36273	ACH	None 🗸	
AIG Claims Inc	19402	ACH	None 🗸	
AppleCare Medical Group	APP01	ACH/VCP	VCP V	
CMT10	12310	ACH/VCP	ACH	
Colorado Health Group	95964	ACH/VCP	VCP	
Dental Benefit Providers	52133	ACH/VCP	None	
ECHO	ECHOH	ACH/VCP	VCP V	
Equitable Life and Casualty Ins Co	62952	ACH	None V	
Equitable National Life	91785	ACH	None 🗸	
Erie Insurance Group	ERIE1	ACH	None 🗸	
US Dept of Health and Human Services	HHSP5	ACH	ACH 🗸	
Golden Rule	37602	ACH/VCP	VCP V	
Harvard Pilgrim	04271	ACH/VCP	ACH 🗸	

* Note: We cannot support VCP for State of Missouri under UMR at this time.

+ Please be aware that not all Payers will submit a full 835 file to Optum Pay. As a result, Optum Pay will only display payment related data for these .



Continue Cancel Finish

5	You will be presented an "Are you sure" page to validate your payment method updates. Select 'Yes'. Note: If ACH was selected, you will be required to add banking information in order to receive direct deposit. (See following steps)
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Enter required banking information, including an upload of a Voided Check or Bank 8 Letter, then select 'Add Bank Account'. - \checkmark Select Payer/Patient: COVID19 HRSA Uninsured Treatment Fund Populate from existing bank account(s) -- Select --Routing Transit Number: 123123123 Bank Name: US Bank Enter the routing number from your voided check or bank letter. Do not use the routing number from your deposit slip. Bank Address: 123 Main Street City: Account Number: 123123123 Anywhere State: AK 🗸 Account Type: Checking

Savings Zip: 12345 ACH Addenda Record Type: CCD 🗸 Phone Number: Upload Document: O Bank Letter Voided Check Browse... Please note, uploading a new document will replace the existing document. Please take the time to review your uploaded document to ensure it is the most up-to-date version Add Bank Account Update Bank Account Clear All Fields ♪ 9 You will also be required to upload a copy of your W9. Select 'Yes'. Electronic Payments and Statements me View Payments Search Remittance Payment Data Files Maintain Enrollment Manage Users My Profile Edit Enrollment - Are You Sure? changed banking information. Payments will no longer be directed to your current will be paid to the bank account you entered. Are you sure you wanted to continue with this banking information change? If yos please upload your current W9 and click on "Yes". nt and ose File No file cho Upload W9: The W9 must be filled out, signed and dated. Yes No 10 When you return to Bank Accounts page, select 'Finish'. Last Login: 2020-04-14 17:03:2 Electronic Payments and Statements Resources
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04/14/2020

MSTester steeber, Tester graphic designer

molly.steeber@optum.com 612-839-3130

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You will be brought to the Verification page to review your entered banking information. Select **'Submit'**



12

You will receive notification that your request has been successfully updated.

Home	View Payments	Search Remittance	Payment Data Files	Maintain Enrollment	Manage Users	Billing Service Information		
Online Enrollm	Online Enrollment Form: Enrollment Completed Successfully							
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At this time you may	At this time you may print your updates.							
	*Note: If this was a reactivation of a previously inactive TIN and you would like to view the existing NPI information please click on the 'Maintain Errollment' tab above. If this is a Print Enrollment Form In order to print the EPS Excellment F							
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If your enrollment or account maintenance is complete please proceed to the Home Page.								
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You will receive an email from Optum Pay, asking you to validate the entered bank account information. **Please click on the link and follow the directions to complete the process.**



11000 Optum Circle, Eden Prairie, MN 55344

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