Optum Supports & Services Manager (OSSM) for Idaho: Instruction Manual

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Contents

Idaho OSSM Links

Access to OSSM:

- Visit *optumidaho.com* > For Network Providers > Targeted Care Coordination (https://www.optumidaho.com/content/ops-optidaho/idaho/en/providers/targeted-care-coordination.html)

or

- Visit *providerexpress.com* > US > Clinical Resources > Forms > Optum Forms – Clinical > Optum Idaho OSSM (https://www.providerexpress.com/content/ope-provexpr/us/en/admin-resources/forms.html)

- Portal User Link: see page 58

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Browser Requirements

OS	Browser	Version
Windows 7 & Windows 10	Chrome	74.0
Windows 7 & Windows 10	IE/Edge	11.0
Windows 7 & Windows 10	Mozilla	60.6.1esr (64-bit) & 52.9.0 ESR (x86 en-US)
MAC IOS 10.13.6	Safari	12.0.3

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OSSM Roles

- OSSM is used only by Optum and the TCC/Facilitator. The TCC/Facilitator will utilize OSSM to submit the PCSP (person-centered service plan).
- Members/families, other support team members, and treatment providers use the “Portal” which you will grant them access to via OSSM (once the ROI/PCSP OSSM Consent is signed). Additional information for Portal Users can be found on page 57.

OSSM User

TARGETED CARE COORDINATOR/FACILITATOR

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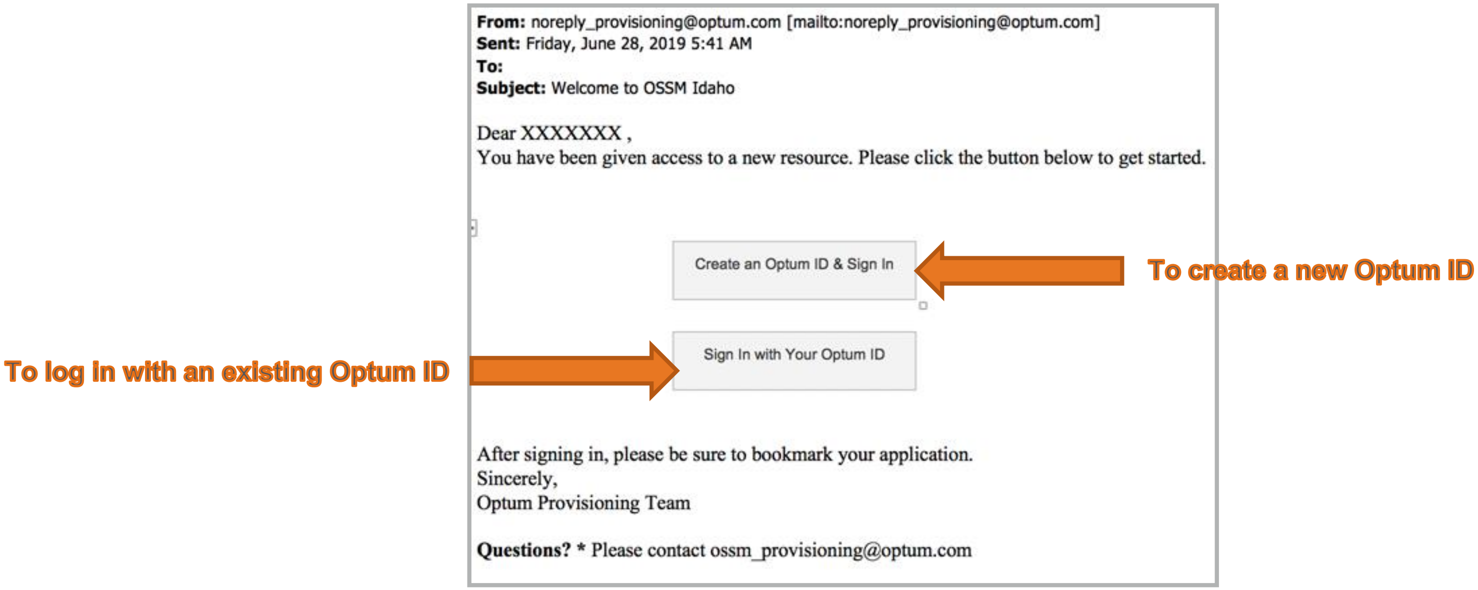
Targeted Care Coordinator/Facilitator

- The Targeted Care Coordinator (TCC)/Facilitator is a user in OSSM who works in a provider agency and who has completed Optum's TCC training.
  - TCCs/Facilitators without completed training will not be allowed access to OSSM.


From: noreply_provisioning@optum.com [mailto:noreply_provisioning@optum.com]
Sent: Friday, June 28, 2019 5:41 AM
To:
Subject: Welcome to OSSM Idaho

Dear XXXXXXX ,
You have been given access to a new resource. Please click the button below to get started.

Create an Optum ID & Sign In

Sign In with Your Optum ID

After signing in, please be sure to bookmark your application.
Sincerely,
Optum Provisioning Team

Questions? * Please contact ossm_provisioning@optum.com

- Before a TCC/Facilitator can access OSSM, an Optum Provisioning e-mail with instructions will be sent. The TCC/Facilitator must follow the TCC specific links in the e-mail.
  - If the TCC/Facilitator already has an Optum ID, they will log in with that Optum ID and its associated password.
  - For TCCs/Facilitators without an existing Optum ID, one will need to be created. To create an Optum ID, select Create an Optum ID & Sign In and complete the required fields.

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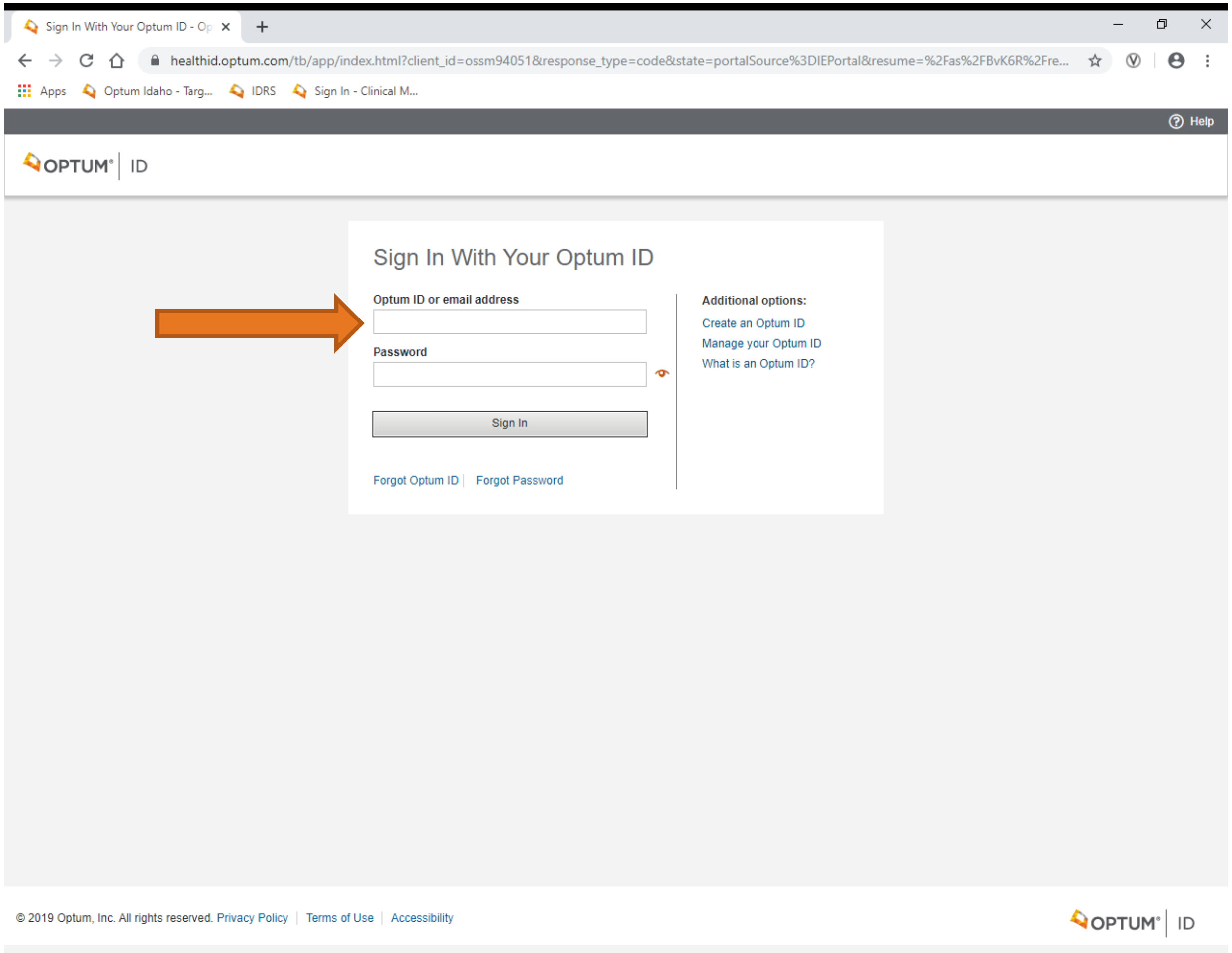
OSSM Login Page



Once the TCC/Facilitator has an Optum ID, they can log into OSSM.

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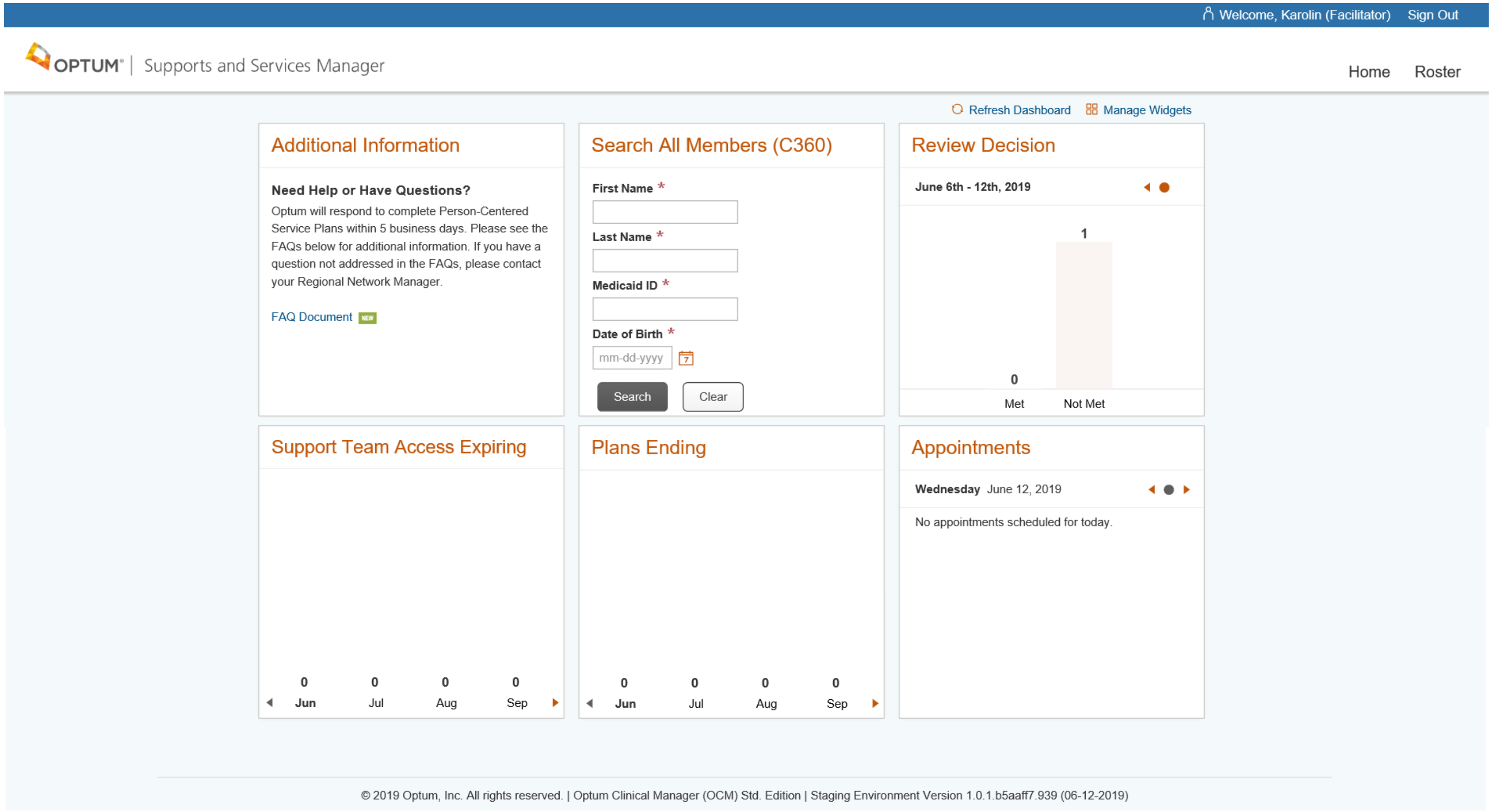
Facilitator Dashboard



When the user first logs in, they will see the OSSM Dashboard.

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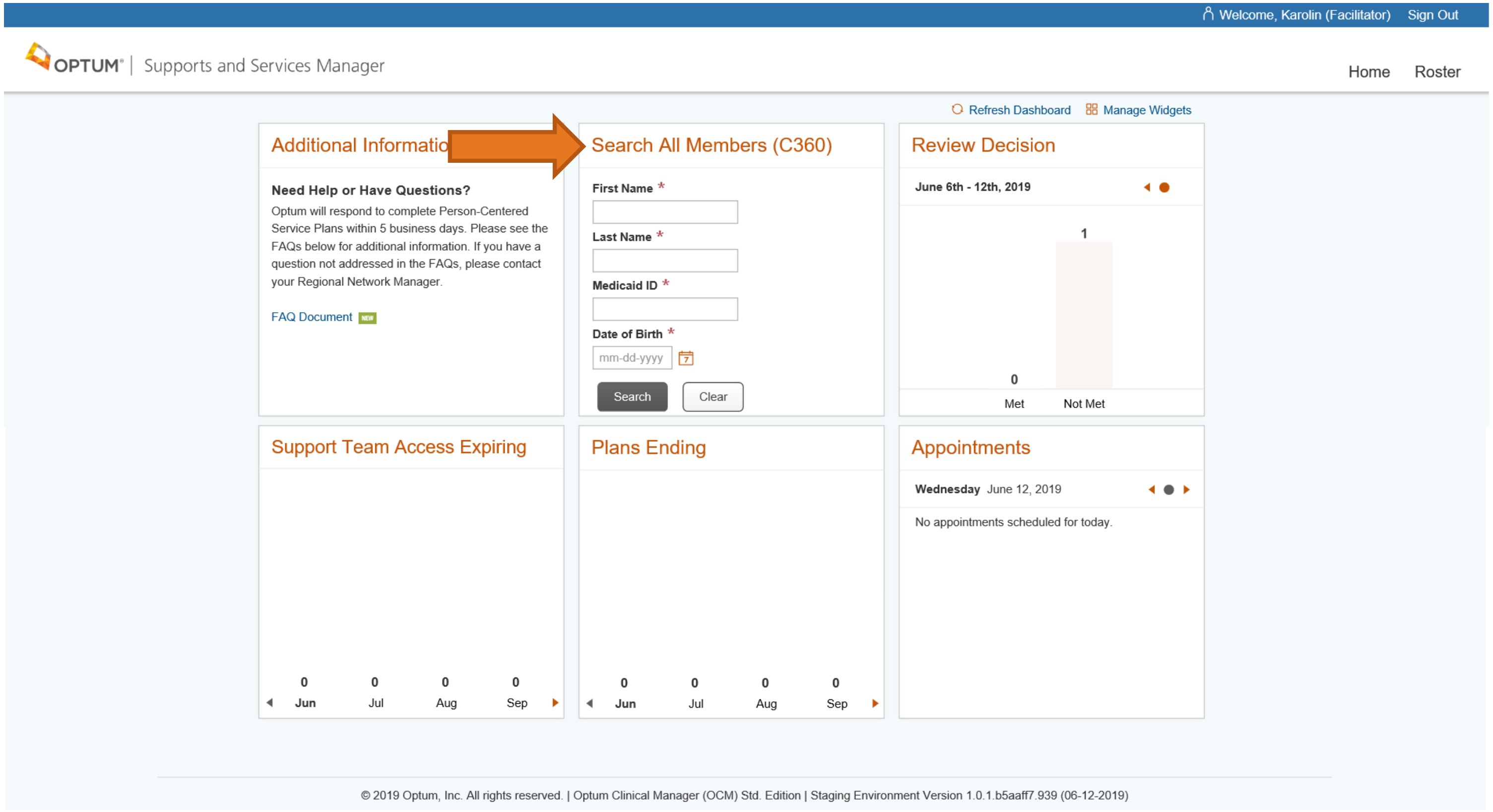
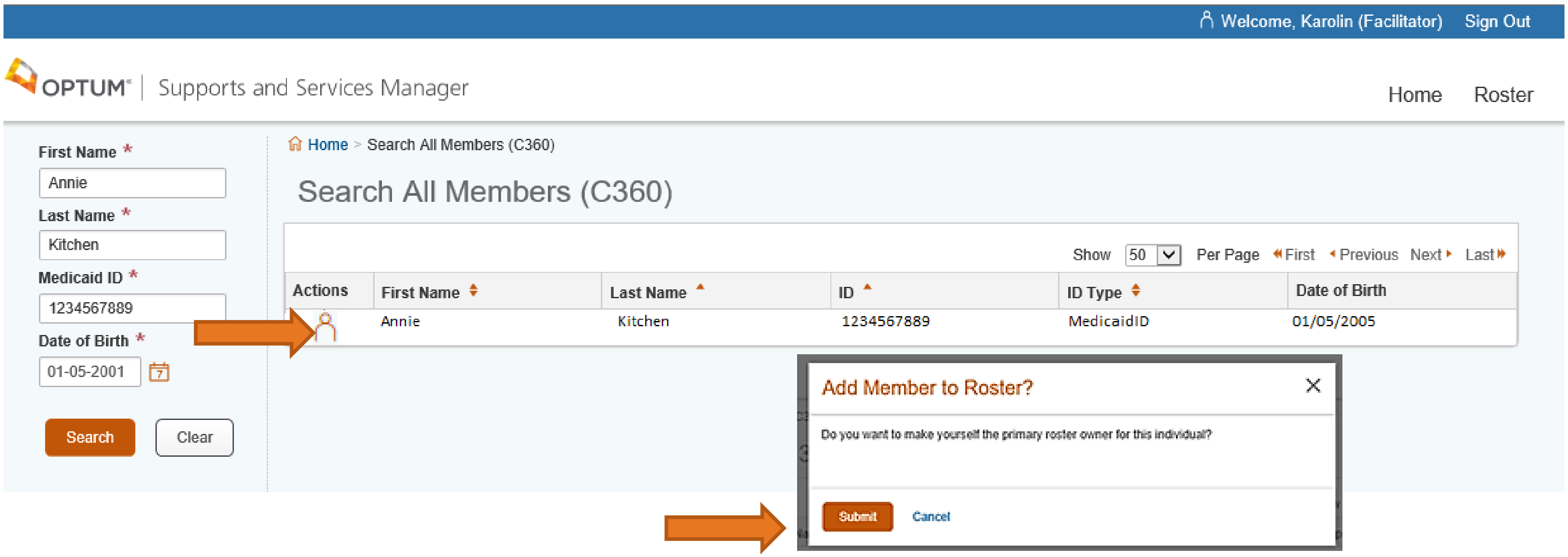
Member Search



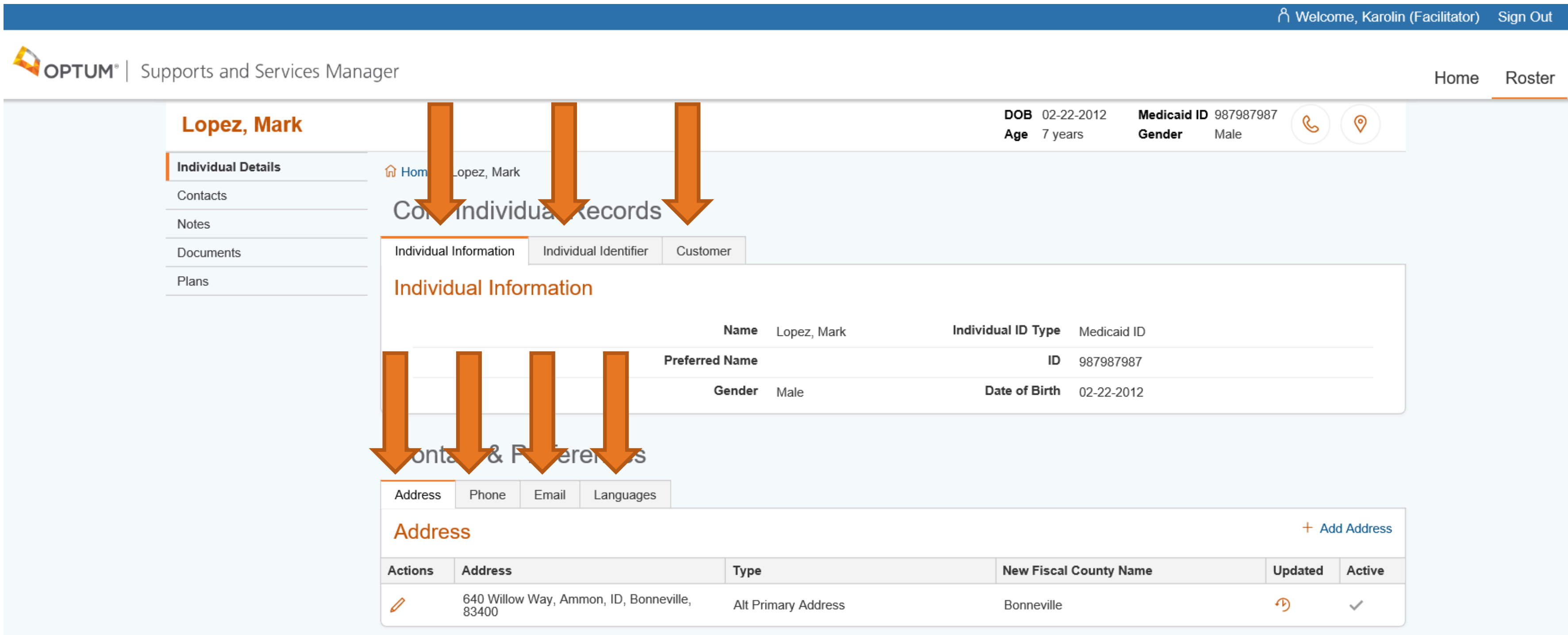
To get started with a new member, the TCC/Facilitator will click on the Search All Members (C360) widget to search for the member by entering all required search criteria. OSSM will search for a match.

Member Search



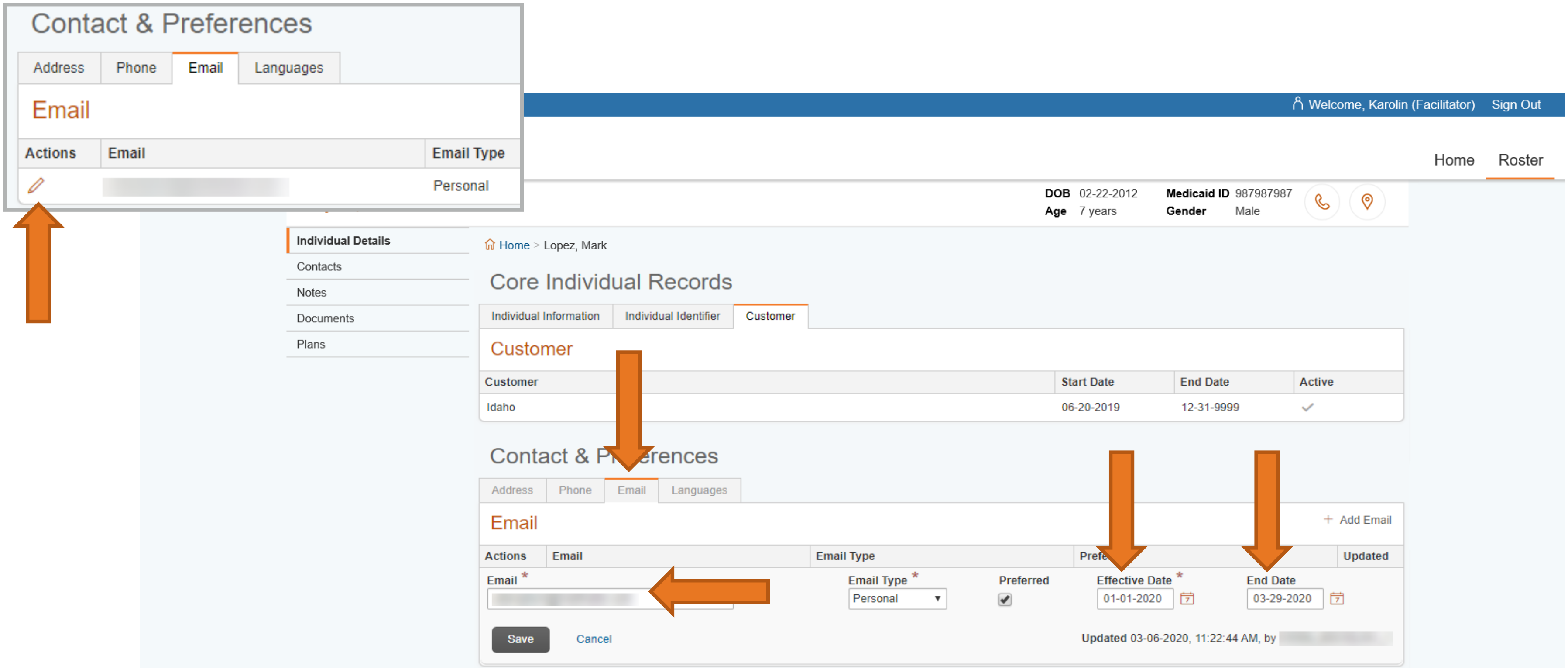
OSSM shows the matching member record if found. The TCC/Facilitator clicks on the person icon in the list to select the member's record and OSSM will ask if they want to be the Primary Roster Owner. The Facilitator clicks Submit, then the member will be assigned to their roster and the user will become the primary owner of the record. If the user cancels this prompt, they will not be able to access the record.

Member Details



The TCC/Facilitator reviews member details which are read-only and imported from the C360 search. The user can click on the tab headers to access sections of the member's record, such as Phone, Email and Languages. Required fields have a red asterisk.

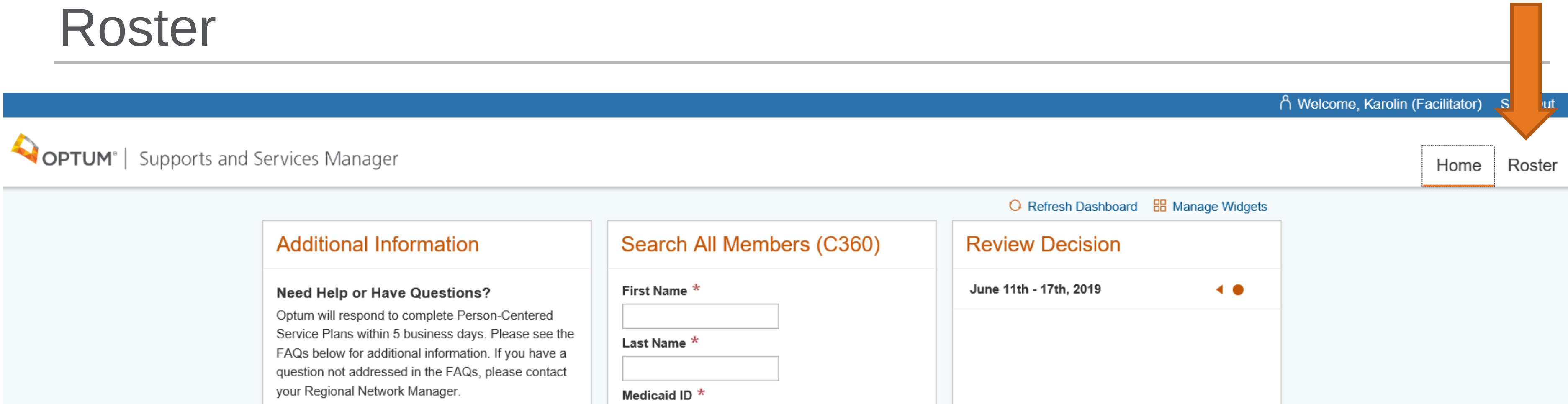
Member Details



The TCC/Facilitator must enter an email address for the member if the member or the primary responsible person (such as the parent or guardian) would like access to the portal to view PCSP content. Select the pencil icon to edit the member’s information.

Important: The Effective Date and End Date determine availability of PCSP-related content in the portal for the member or the primary responsible person and any non-member portal user that has been granted access. Please update it as needed.

Roster



The TCC/Facilitator can see who is on their roster by clicking on the Roster option at the top of the OSSM screen on the far right in the white bar. This Roster option is available on most pages within OSSM.

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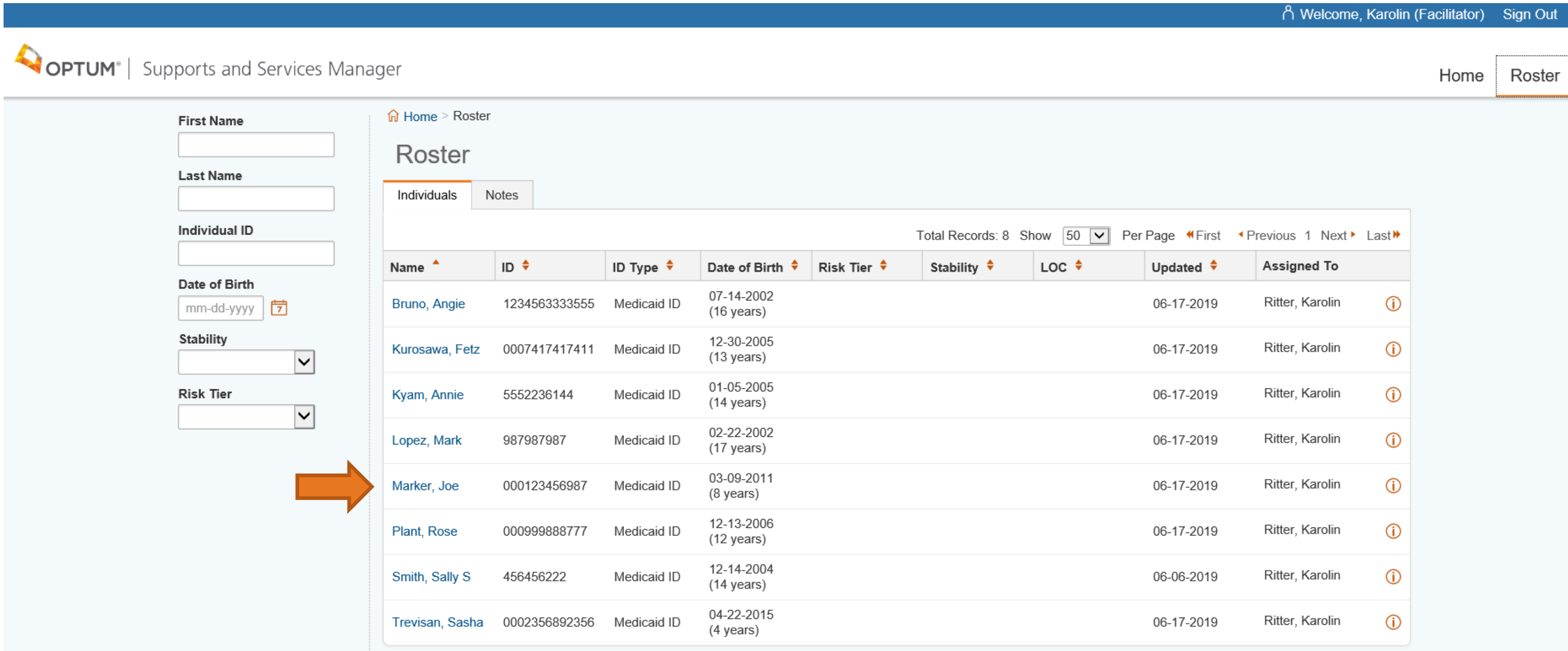
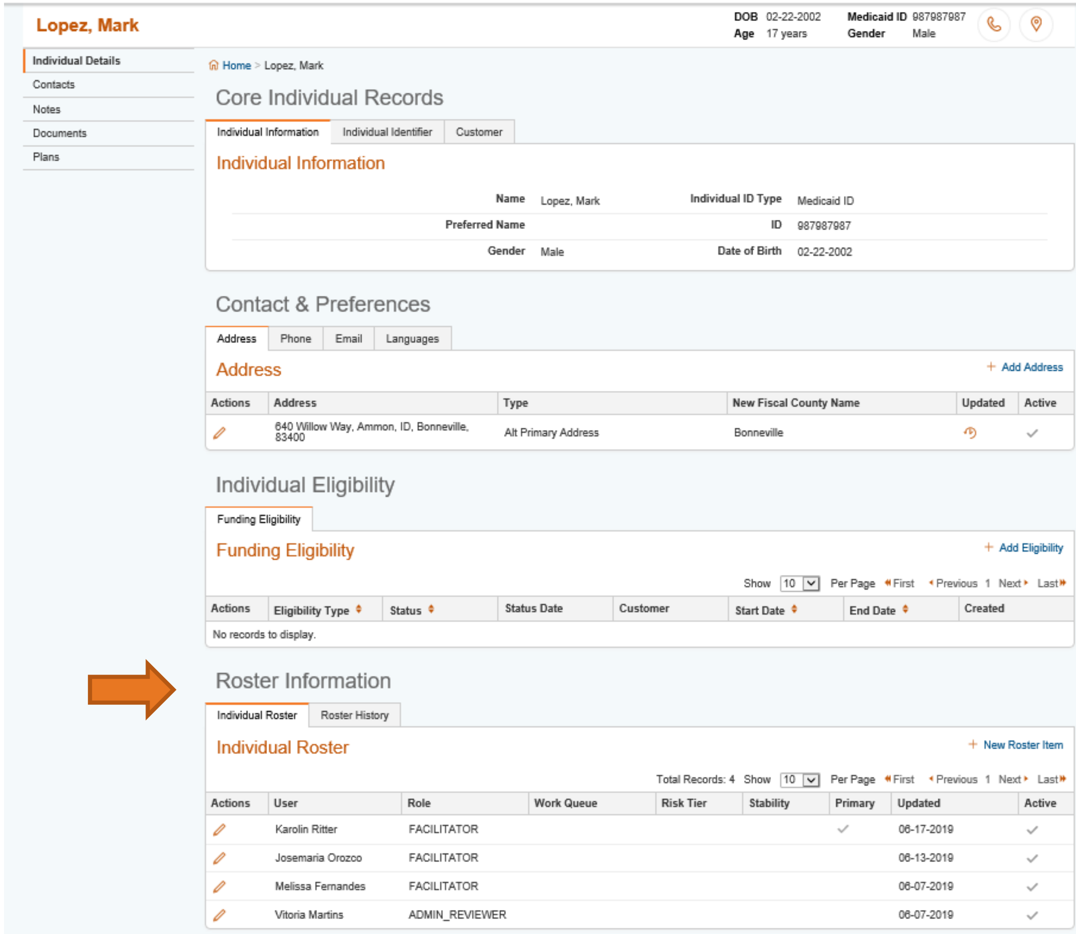
Roster List View



Name	ID	ID Type	Date of Birth	Risk Tier	Stability	LOC	Updated	Assigned To
Bruno, Angie	1234563333555	Medicaid ID	07-14-2002 (16 years)				06-17-2019	Ritter, Karolin
Kurosawa, Fetz	0007417417411	Medicaid ID	12-30-2005 (13 years)				06-17-2019	Ritter, Karolin
Kyam, Annie	5552236144	Medicaid ID	01-05-2005 (14 years)				06-17-2019	Ritter, Karolin
Lopez, Mark	987987987	Medicaid ID	02-22-2002 (17 years)				06-17-2019	Ritter, Karolin
Marker, Joe	000123456987	Medicaid ID	03-09-2011 (8 years)				06-17-2019	Ritter, Karolin
Plant, Rose	000999888777	Medicaid ID	12-13-2006 (12 years)				06-17-2019	Ritter, Karolin
Smith, Sally S	456456222	Medicaid ID	12-14-2004 (14 years)				06-06-2019	Ritter, Karolin
Trevisan, Sasha	0002356892356	Medicaid ID	04-22-2015 (4 years)				06-17-2019	Ritter, Karolin

The Roster listing shows all members that are on the TCC/Facilitator's roster. Click on a name in the list to access a member's records.

Roster View from Within Member Record



The TCC/Facilitator may see whose roster the member belongs to by viewing the Roster Information section at the bottom of the member's records.

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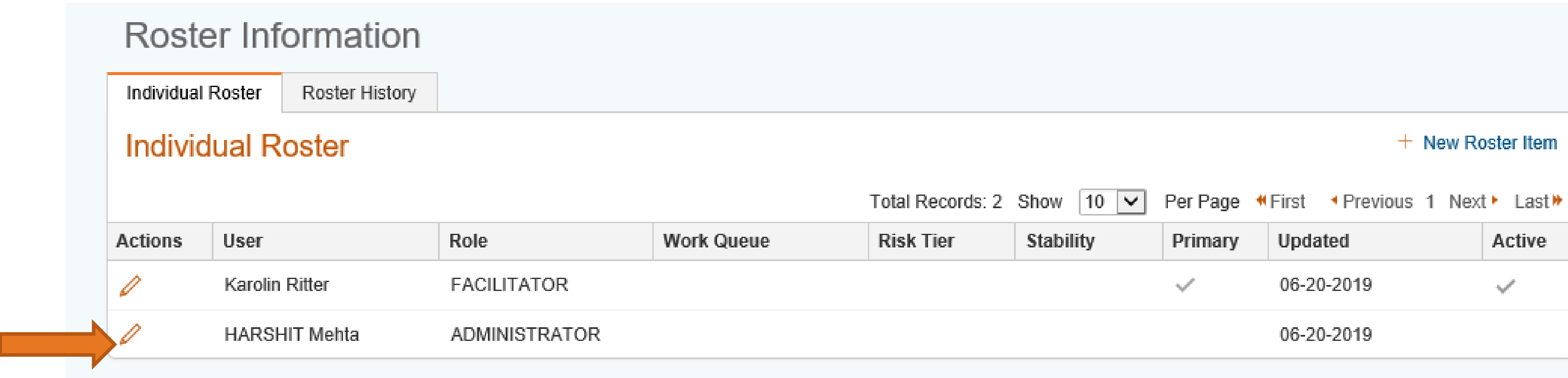
Roster View from Within Member Record



Roster Information

Individual Roster | Roster History

Individual Roster

+ New Roster Item

Total Records: 2 Show 10 Per Page First Previous 1 Next Last

Actions	User	Role	Work Queue	Risk Tier	Stability	Primary	Updated	Active
	Karolin Ritter	FACILITATOR				✓	06-20-2019	✓
	HARSHIT Mehta	ADMINISTRATOR					06-20-2019	

OSSM will have placed the member on the TCC/Facilitator’s roster as soon as the TCC/Facilitator selects the member from the search results page. The TCC/Facilitator will be made the Primary owner of the member on the roster. This ownership allows the Facilitator to create and own new plans. Users can access the Individual Roster assignments at the bottom of the member’s Individual Details page. Users can end the member’s assignment to their roster by clicking on the Pencil icon to the left of their name on the roster list and placing an End Date on the assignment.

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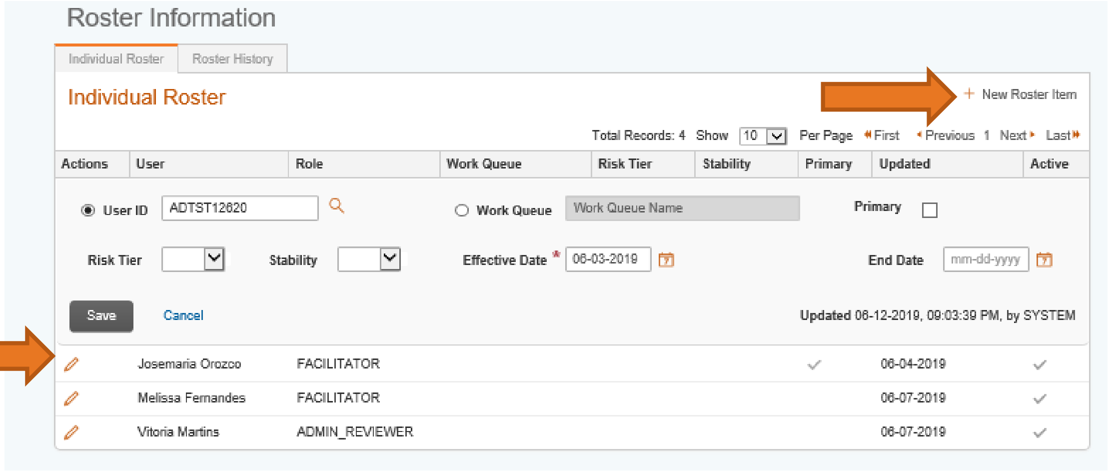
Roster Maintenance



From the Roster Information section, the TCC/Facilitator may:

- Remove a member from another TCC/Facilitator's roster or from their own (e.g. if the member chooses another TCC)
  - Click the pencil by the user name on the roster and enter an End Date, then save the change. (If you are the new Primary owner, please assign yourself as the new Primary)
- Make yourself the Primary Roster Owner for a member
  - Click the pencil by your name and click on the Primary checkbox to enter a checkmark, select Make Primary, and click Save to make the change
- Make someone else the Primary Roster Owner
  - Click the pencil beside another user's name and click the Primary checkbox to make them primary, save and agree to the change
- To add a facilitator not previously listed as a Primary Roster Owner
  - Click New Roster Item, lookup new TCC/Facilitator , click the Primary checkbox to enter a checkmark, then save the change and click to agree to the change

Roster History tracking: all changes above are kept in an audit trail and are visible in the Roster History page above

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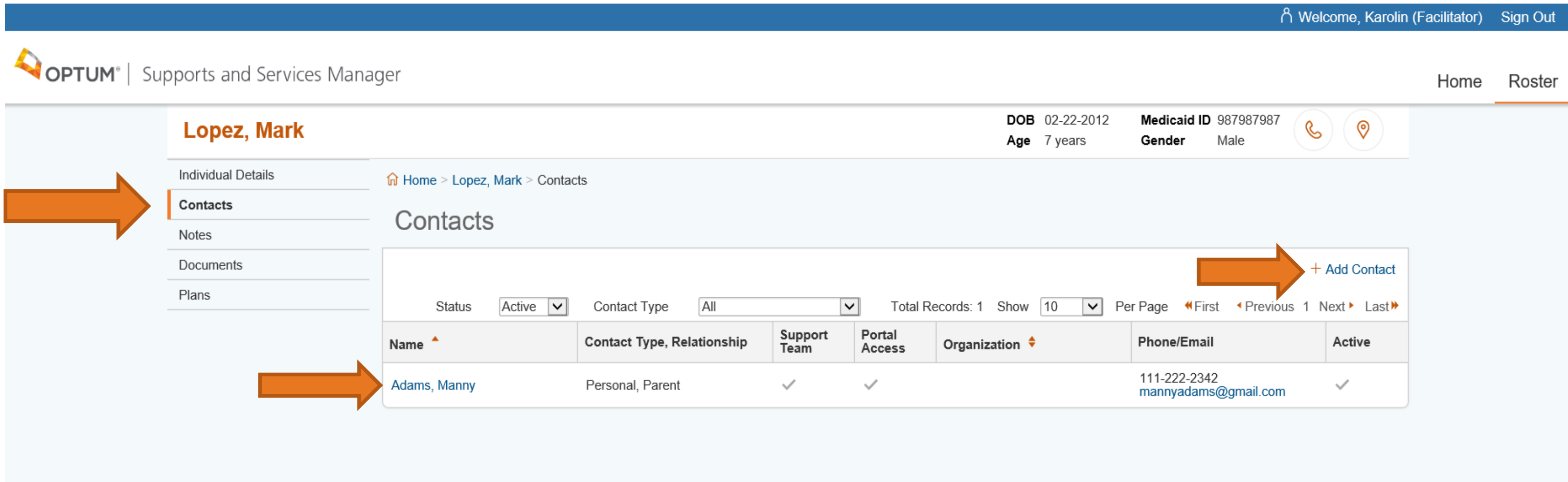
Member Contacts List



Under the member's Contacts, the TCC/Facilitator will add the individual's Child and Family Team members, including parents and/or legal guardian. Click on the name of the contact to edit their details. Required fields have a red asterisk.

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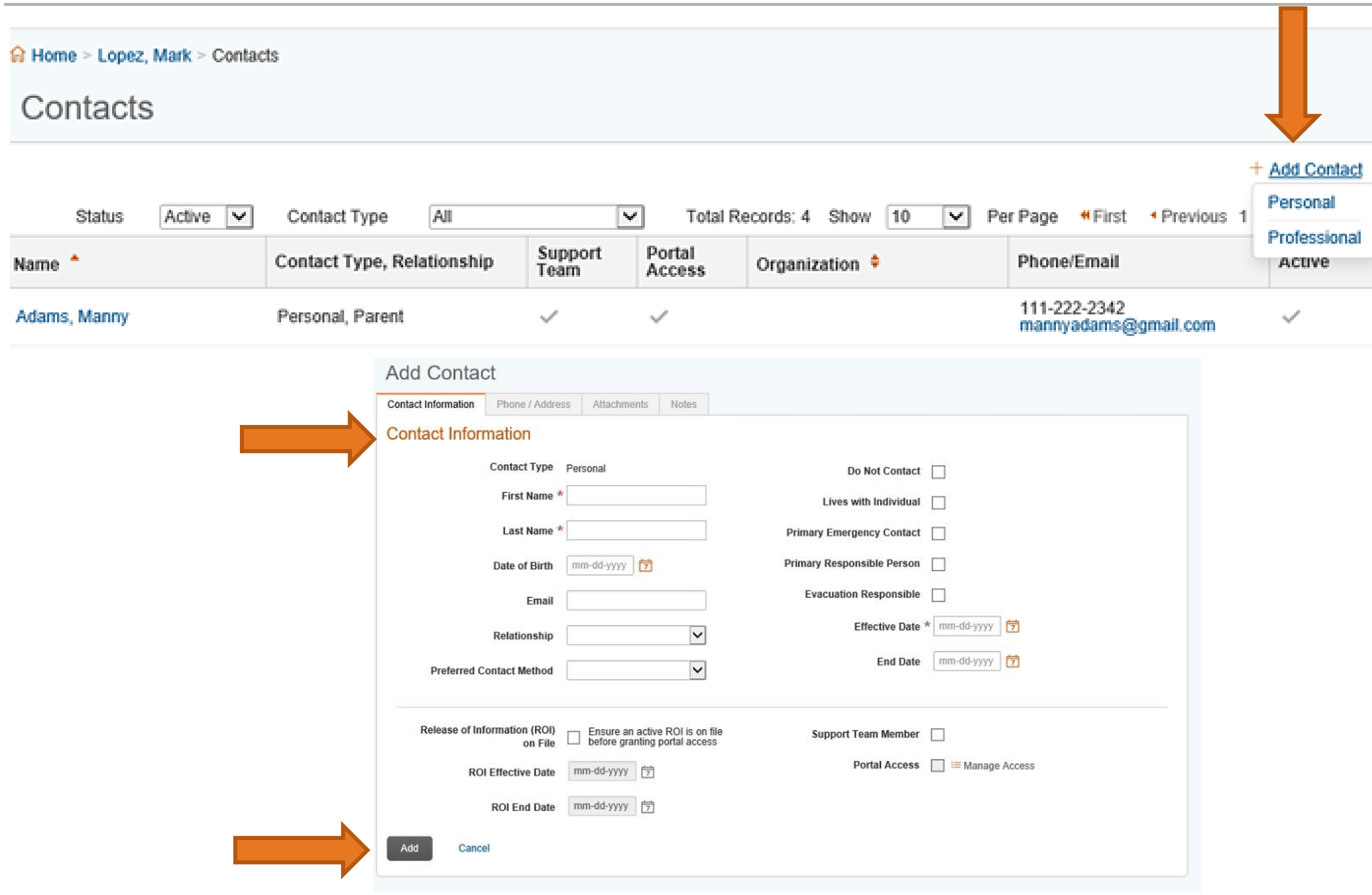
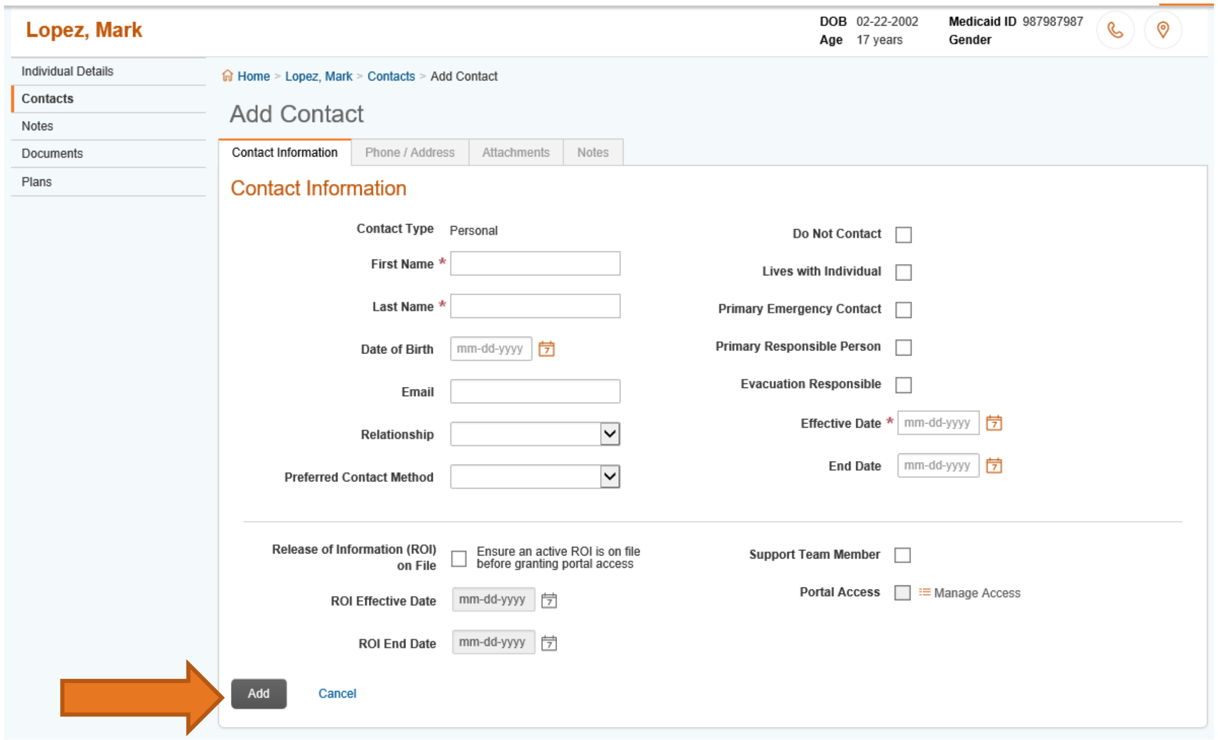
Add New Contact



Click Add Contact and OSSM will prompt the user to select either a Personal or Professional Contact. Depending on the selection, the Add Contact screen will display slightly different fields.

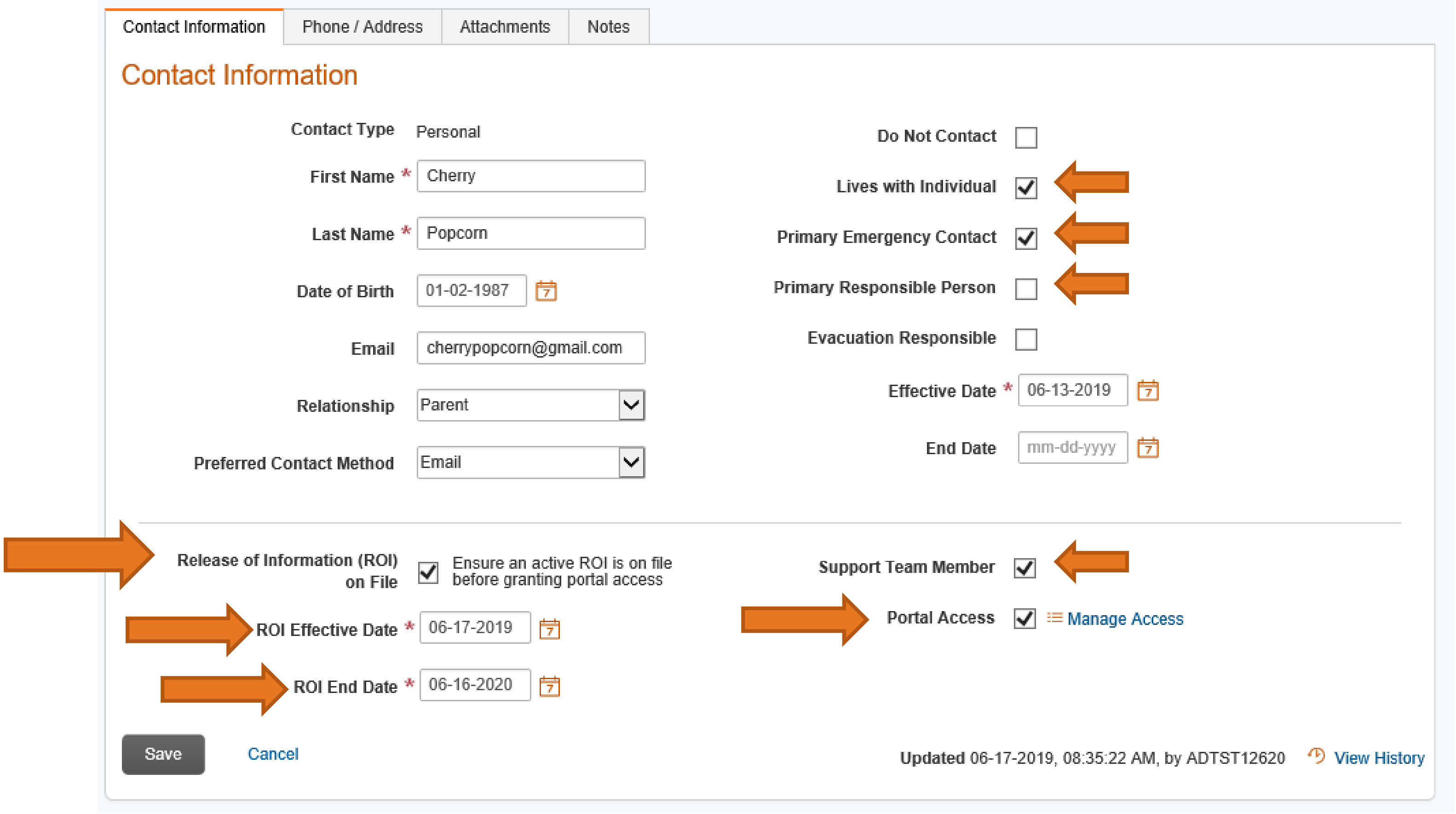
Member Contact Details



The TCC/Facilitator enters the name, email, any addresses and phone numbers into the contact record, and indicates they are a support team member, need portal access, and the dates that the ROI/PCSP OSSM Consent are effective. The TCC/Facilitator must click the Add button to save the contact record before adding the address and phone #. **Please ensure you have the signed ROI/PCSP OSSM Consent by the member/family on file before checking the ROI box.**

The contact's first name, last name and email address must match what the support member enters when creating their Optum ID to access the member's record in the non-member portal.

Member Contact ROI/PCSP OSSM Consent for Portal Access



The member or their designated primary person responsible (typically a parent or legal guardian), will sign an ROI/PCSP OSSM Consent per support team member they want to have access, identifying the date range of access and the sections the person can access. To indicate the primary responsible person (such as the parent or guardian) the TCC/Facilitator will click on the labeled field above. Only one person may have this designation. This person has member level access to the portal.

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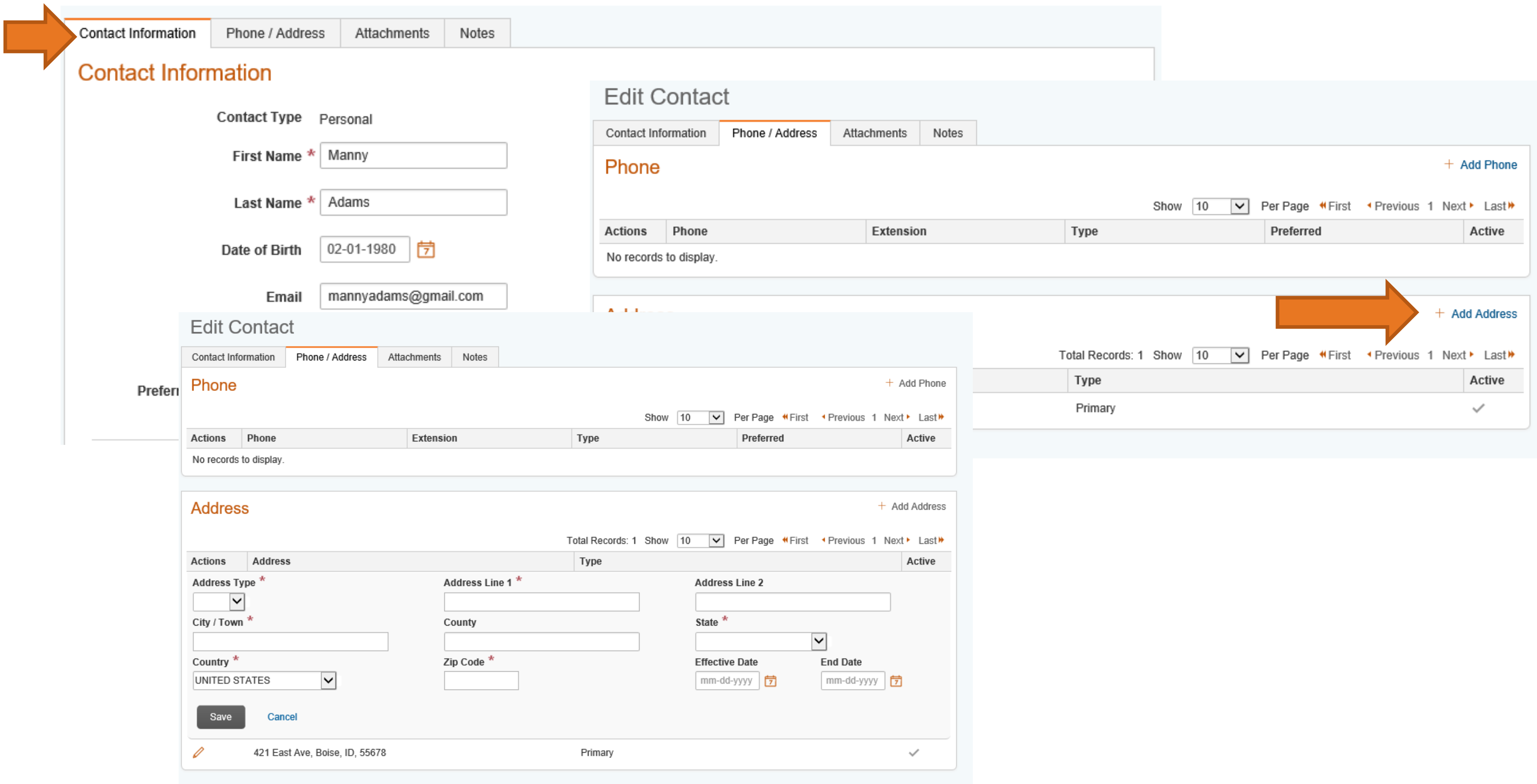
Member Contact ROI/PCSP OSSM Consent for Portal Access



After creating the Contact Information and clicking Add to save it, the TCC/Facilitator needs to enter a primary address for the contact by clicking on the Phone/Address section above.

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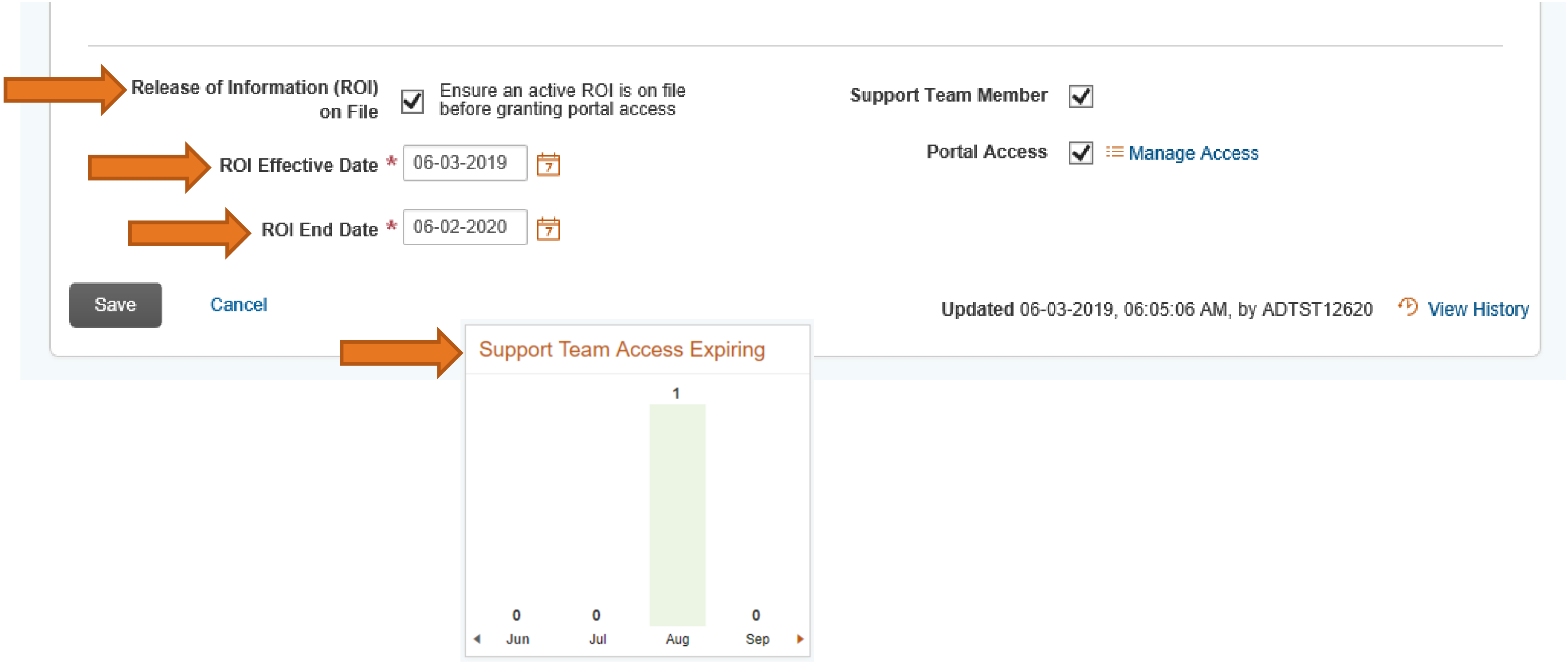
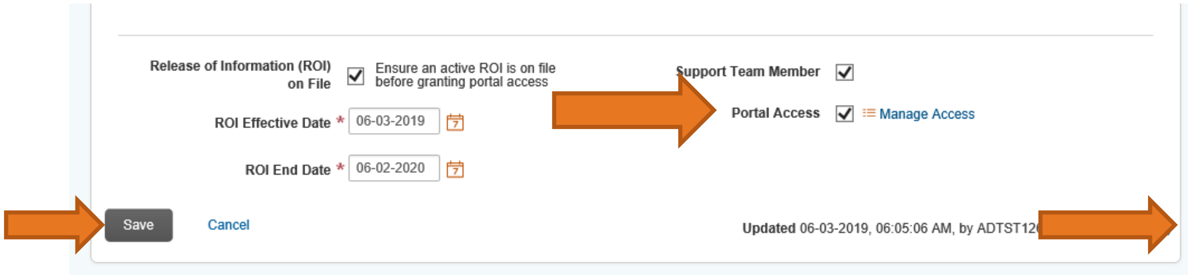
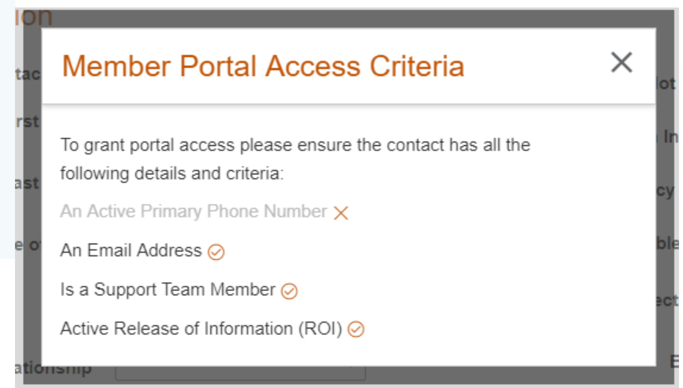
Member Contact ROI/PCSP OSSM Consent for Portal Access



At the bottom of the Contact screen, the TCC/Facilitator will indicate there is an active ROI/PCSP OSSM Consent on file and will enter the effective dates. **The ROI/PCSP OSSM Consent should be kept on file by the TCC/Facilitator.** A separate ROI/PCSP OSSM Consent is required at least annually per support team member accessing the portal. The Support Team Access Expiring widget on the home screen (shown above) will help the TCC/Facilitator maintain these files so that no one loses portal access inadvertently. There is also a Revocation of Consent form on the website if the member/family want to remove access, in which case you uncheck the Portal Access box.

Member Contact Portal Access Controls





To grant portal access to the support team member, the TCC/Facilitator must save the contact record and then enter an address for the contact, then return to this screen and click on the Portal Access checkbox, above.

OSSM will inform the user that the Contact must have an active phone number, an email address, be checked as a Support Team Member, and must have an active ROI/PCSP OSSM Consent on file. An “x” will be placed beside any missing piece of information.

Support team members that have been granted access will need to create an Optum ID on the non-member portal and their **first name, last name, and email** must match what was entered by the TCC/Facilitator when creating the contact (please see page 58 for more information related to the portal).

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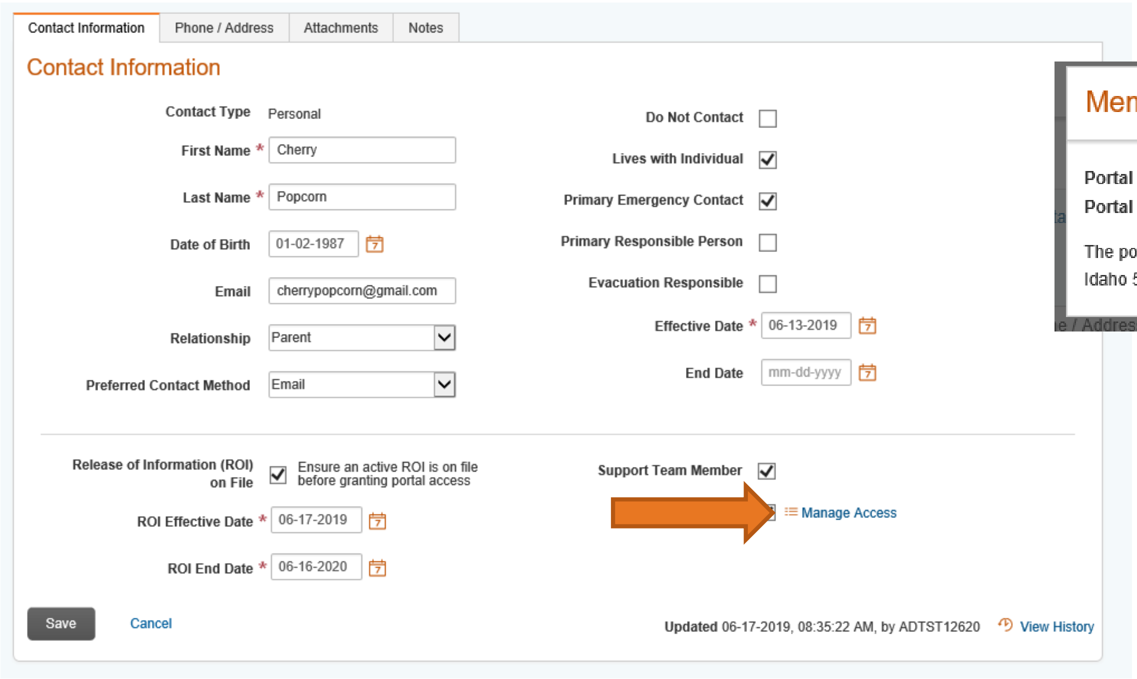
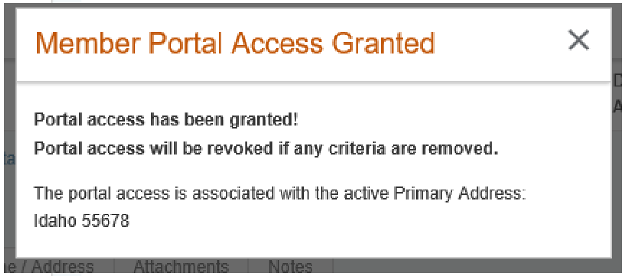
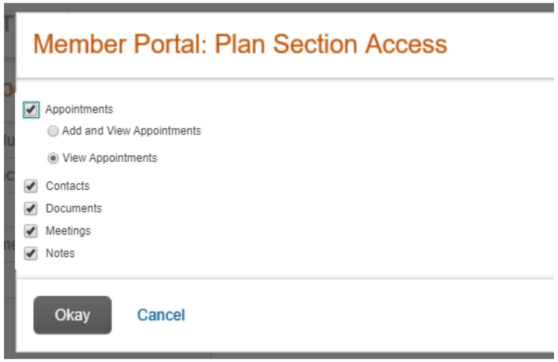
Member Contact Portal Access Controls







OSSM will display the “Portal Access Granted” information box if all criteria are present.

The TCC/Facilitator will click on the “Manage Access” link to indicate which sections of the portal to which each support team member will have access. The TCC/Facilitator will select Meetings, Contacts and/or Notes, which will display in the portal in addition to the PDF of the PCSP.

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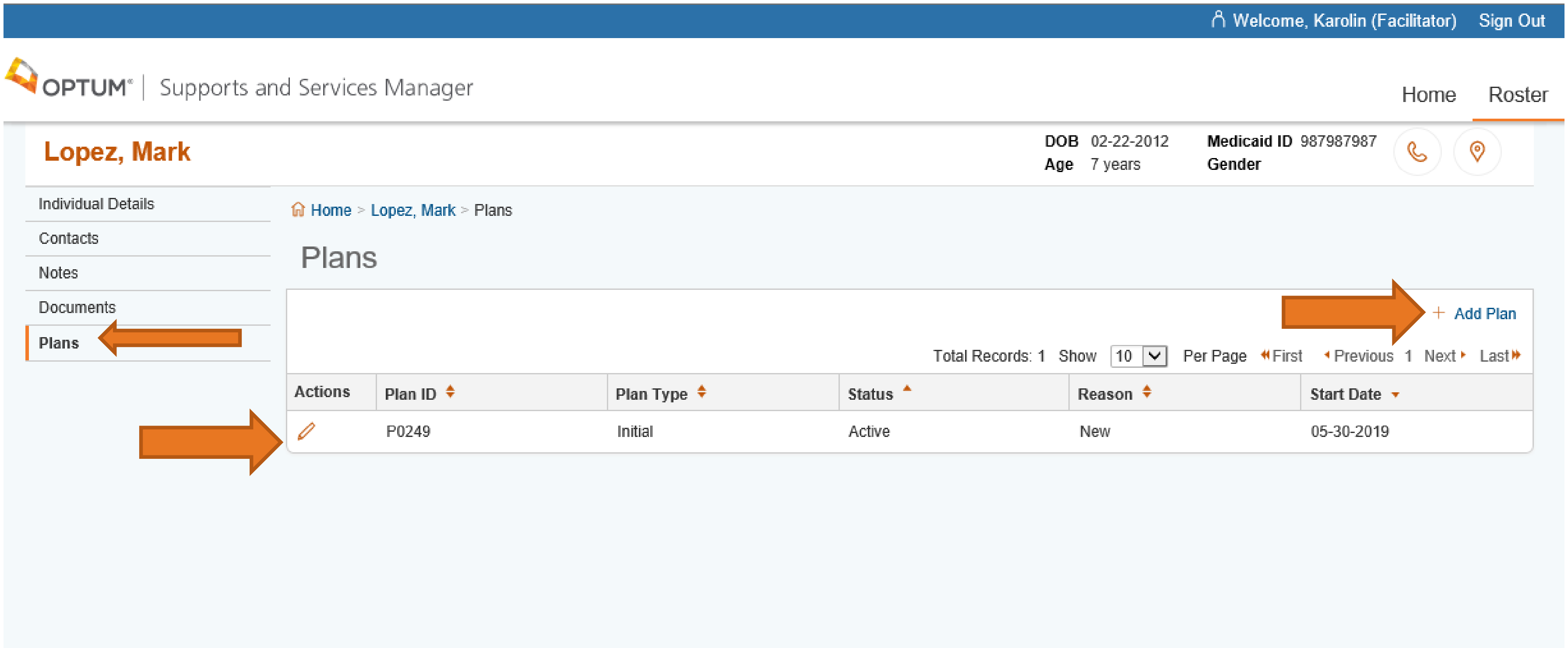
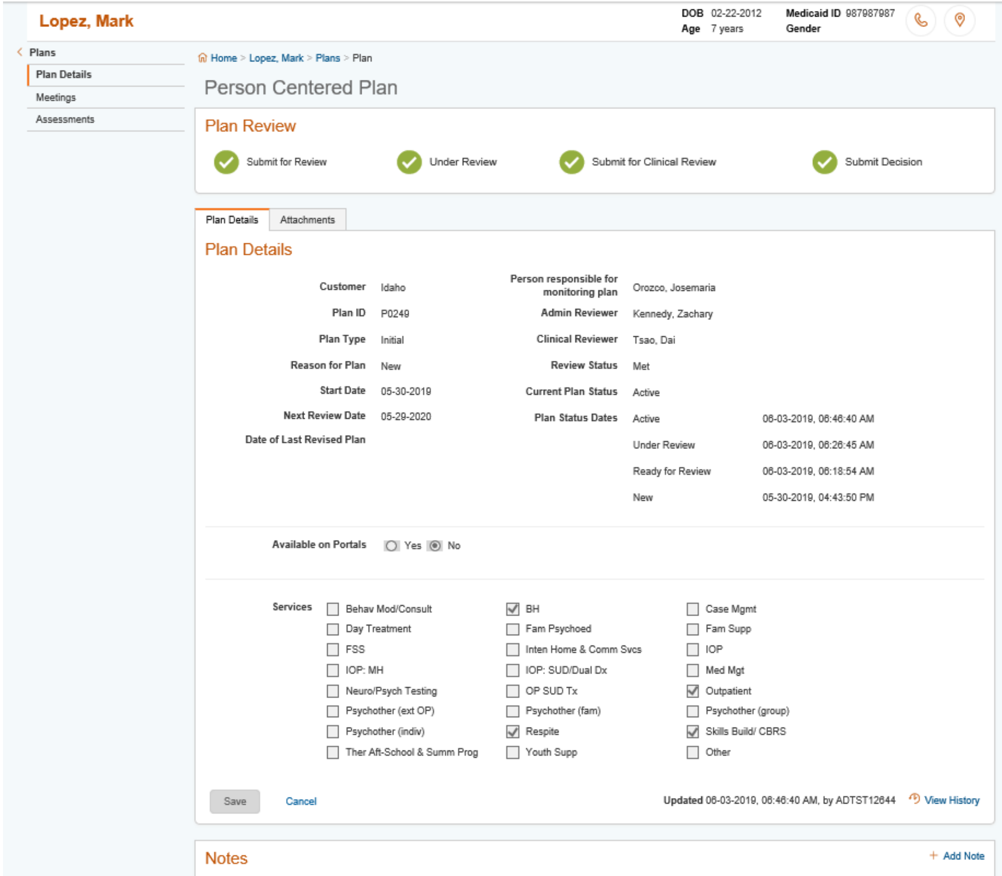
Member Plans List



The TCC/Facilitator clicks on the member's Plans section and sees a list of existing plans submitted for review, if there are any. The TCC/Facilitator can click on the pencil icon to view one of the plans or the Add Plan link to add a new plan.

Member Plans Details



Basic details about the plan are entered, including the type of plan, date range, the last plan review date, and the services requested on the plan (You must enter at least one service). The rest of the information will automatically be populated as the plan is created.

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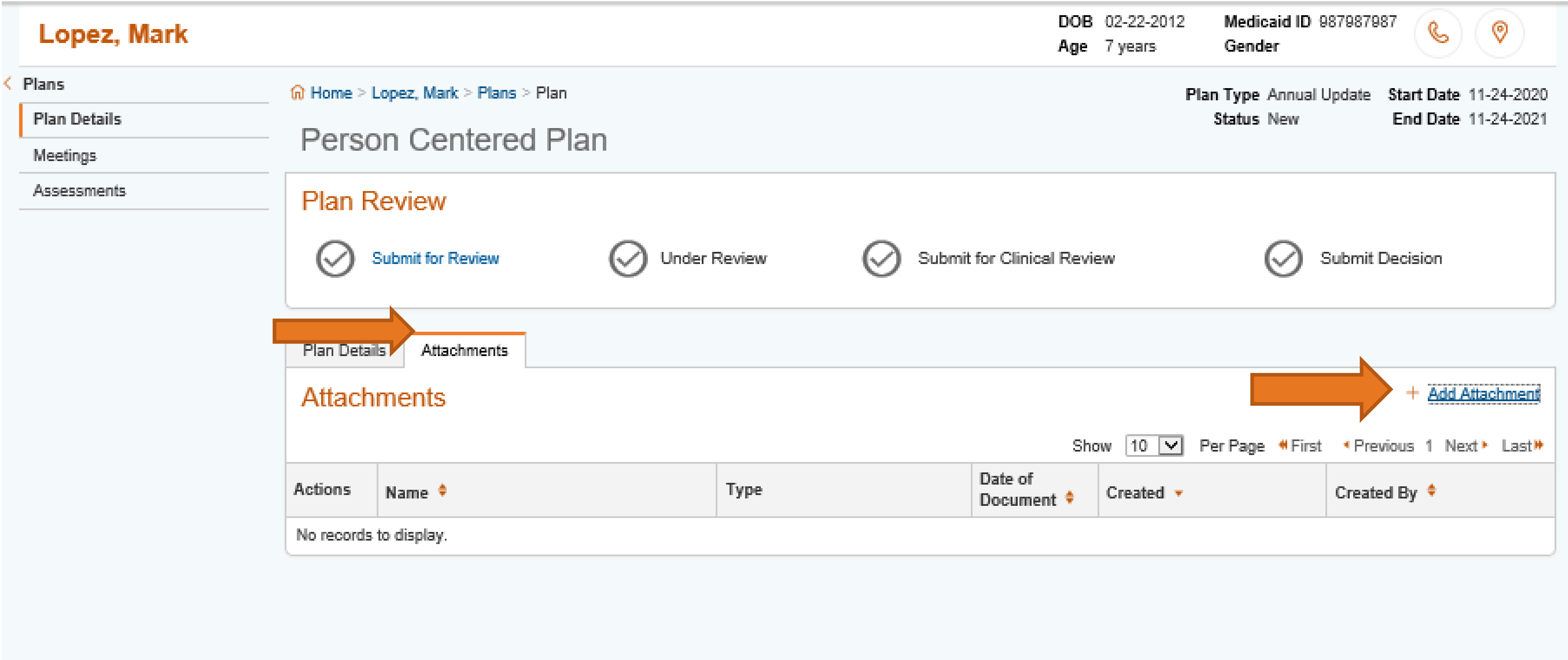
Member Plan PDF Attachment



The TCC/Facilitator then goes to the Attachments tab and can add a new PCSP in the PDF format. The TCC/Facilitator clicks Add Attachment from this page, at the right.

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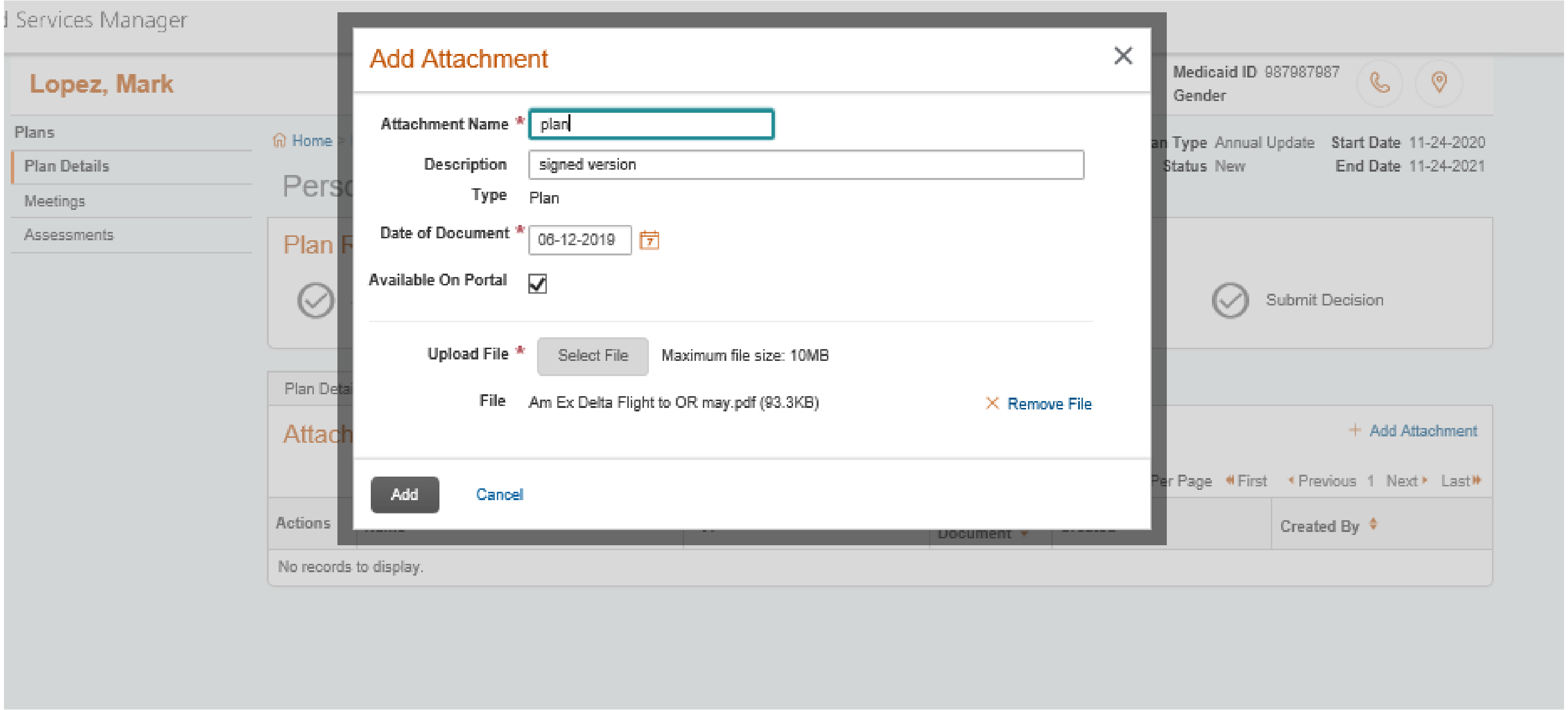
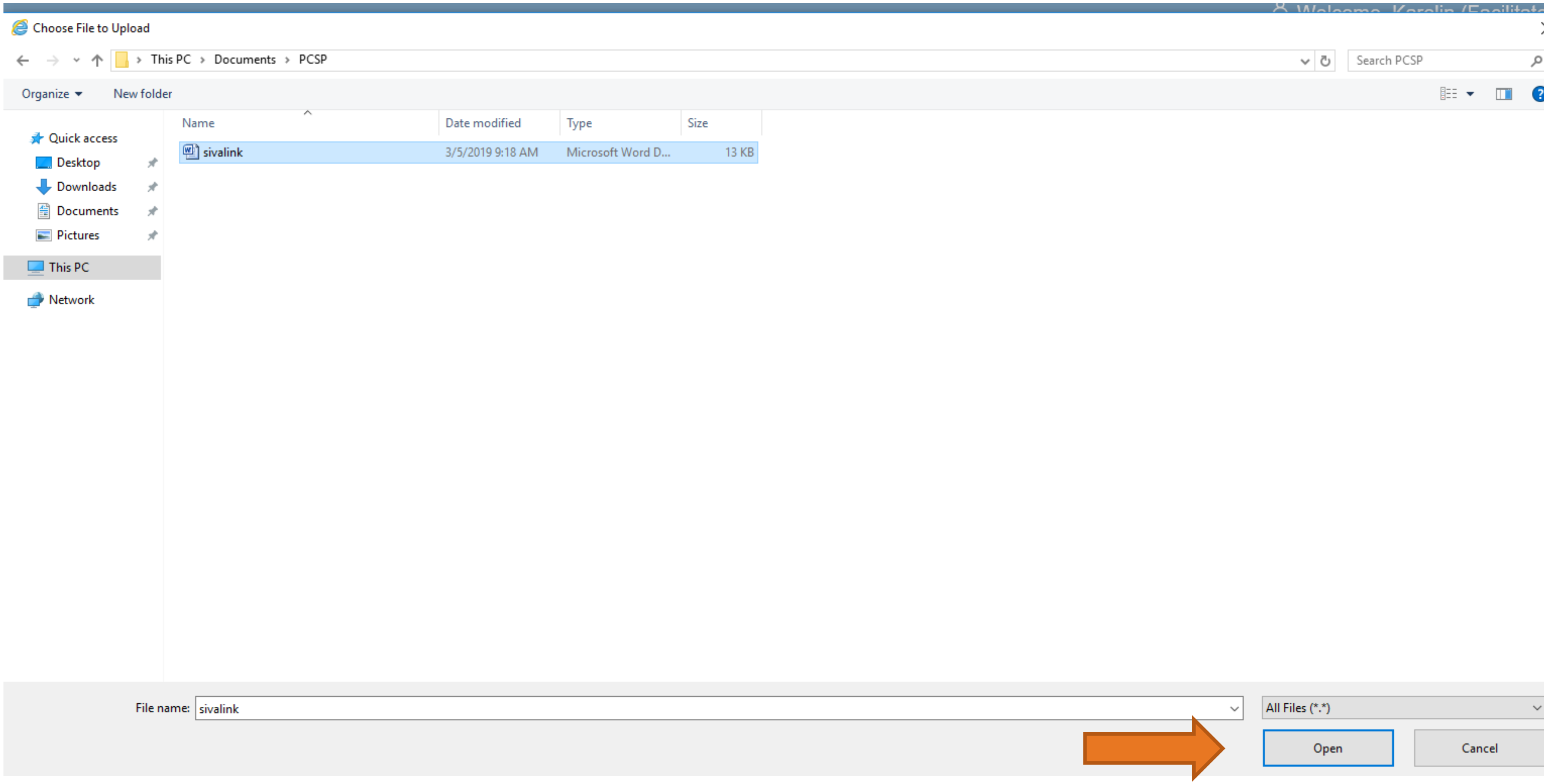
Member Plan Add PDF Attachment



After the TCC/Facilitator clicks Add Attachment, the screen above pops up and the TCC/Facilitator names the document, may describe its contents, and clicks Select File to upload the PDF file.

Click Available On Portal to make it viewable in the portal; however, the plan will not be available on the portal until the plan has met CFR Review.

Member Plan Add PDF Attachment



After clicking Select File, OSSM displays the user's desktop files. The user navigates to the folder where the PCSP document resides and then clicks on the document and clicks Open at the bottom of the screen to select.

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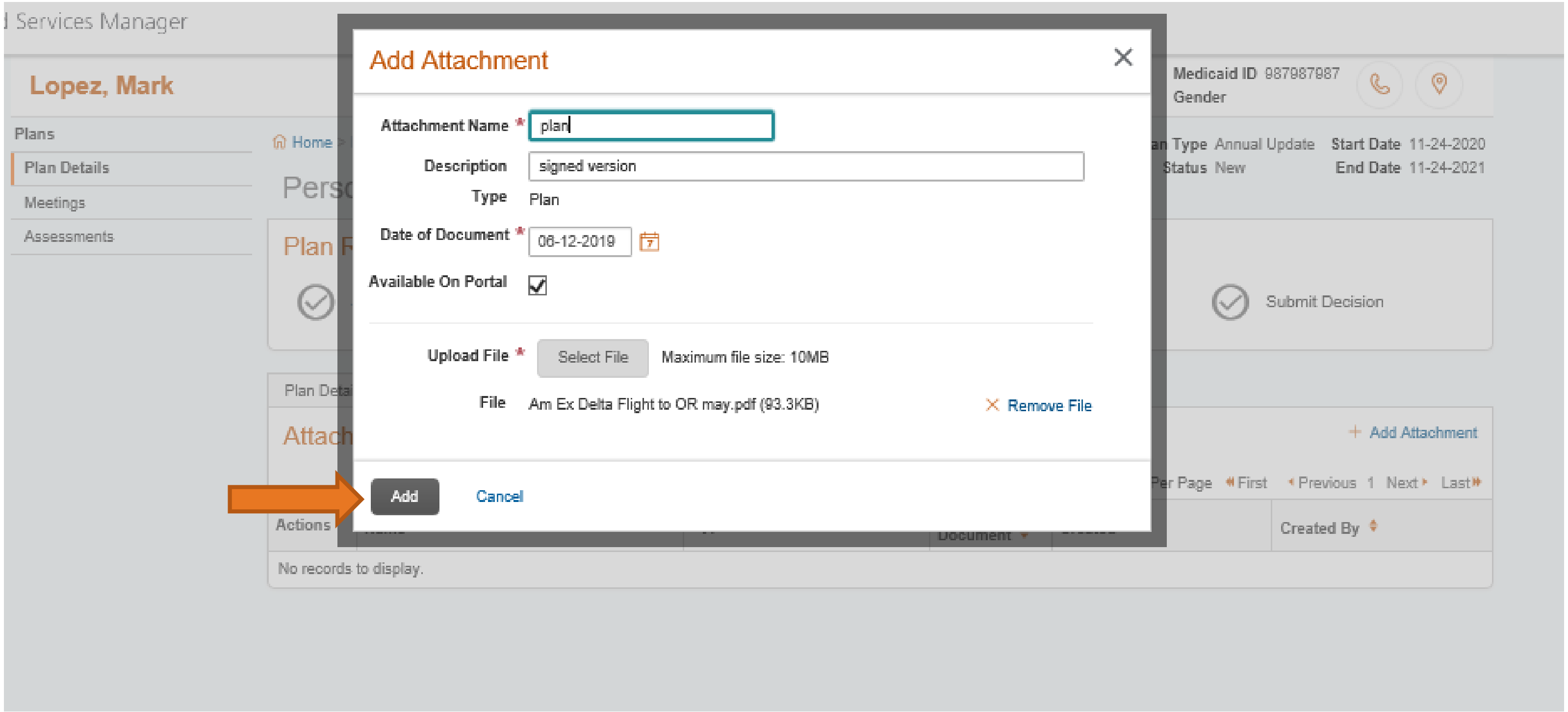
Member Plan Add PDF Attachment



After the TCC/Facilitator selects the PDF file and is returned to this screen, the user clicks Add to save the plan in the PDF format.

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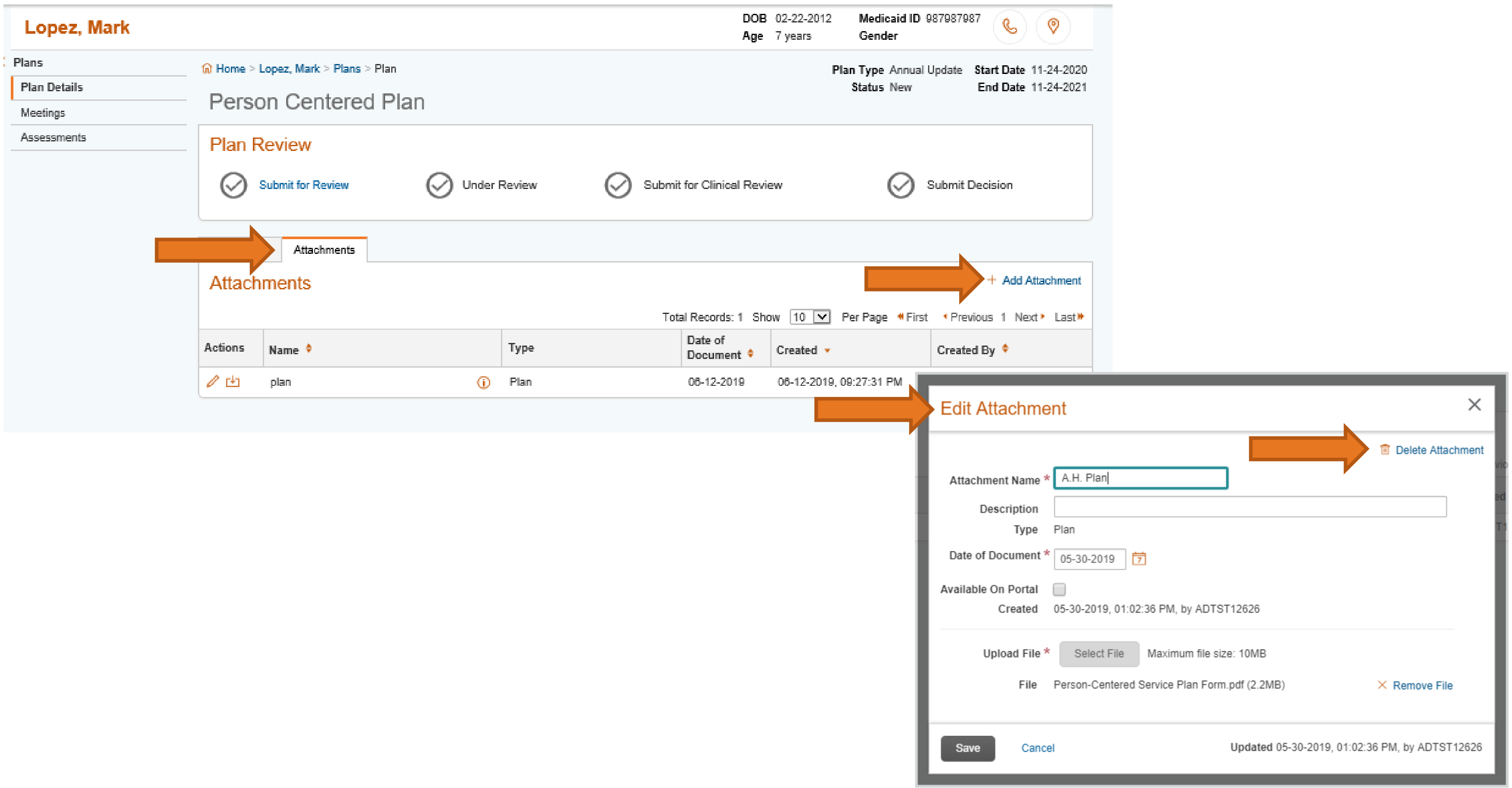
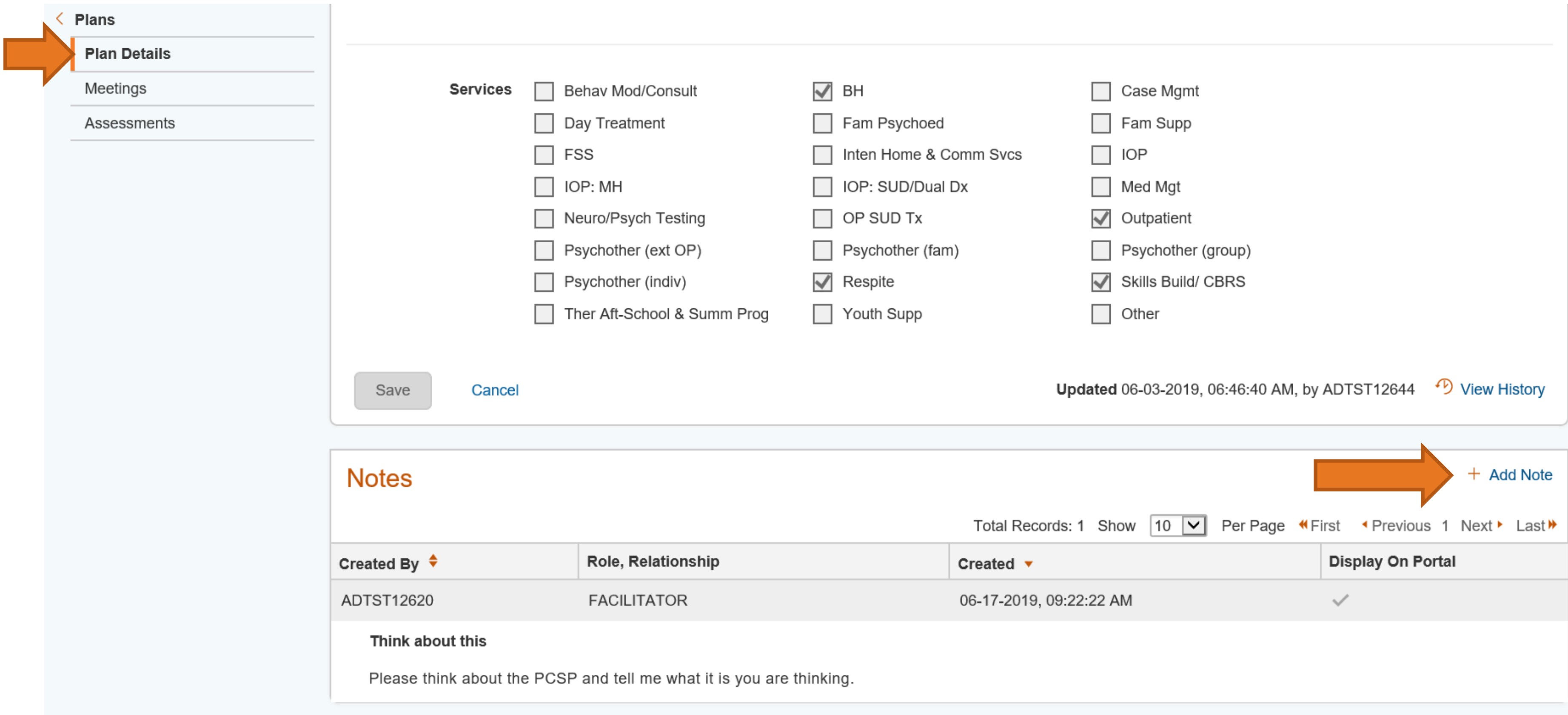
Member Plan PDF Attachment



The attached document is now visible in the Attachments list view. The TCC/Facilitator can add or remove a document if necessary, until it is submitted for review.

Member Plan Notes



TCCs/Facilitators may add and view notes about a plan (optional). To access Notes in the plan, navigate to the Plan Details page and scroll to the bottom of the page. To add a Note, click Add Note.

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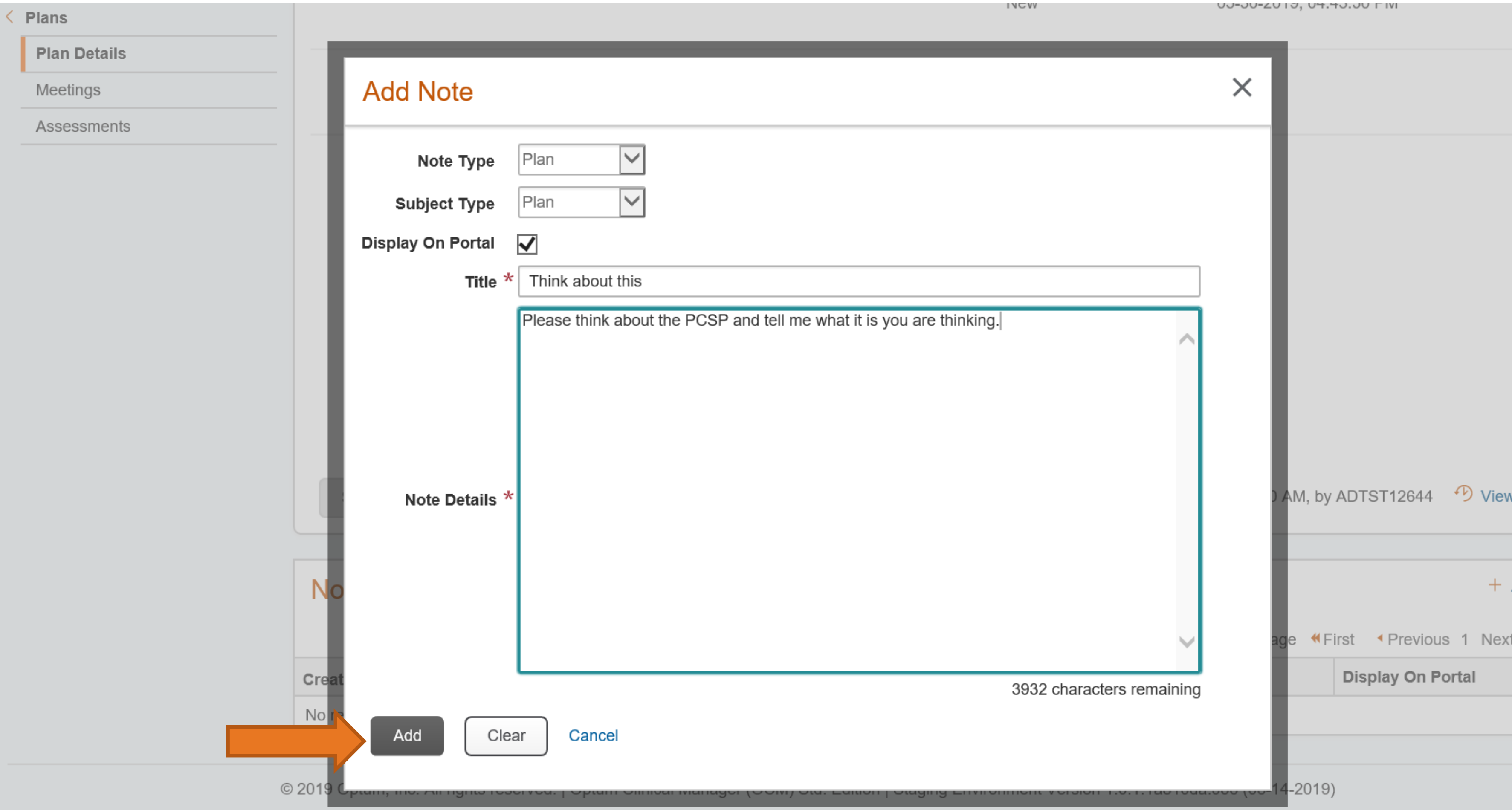
Member Plan Notes



The TCC/Facilitator enters the note about a plan. Each note has a Title and descriptive text. The TCC/Facilitator can decide if the note is to be displayed on the portal or not by clicking on the Display on Portal checkbox. When done, click Add to save the note.

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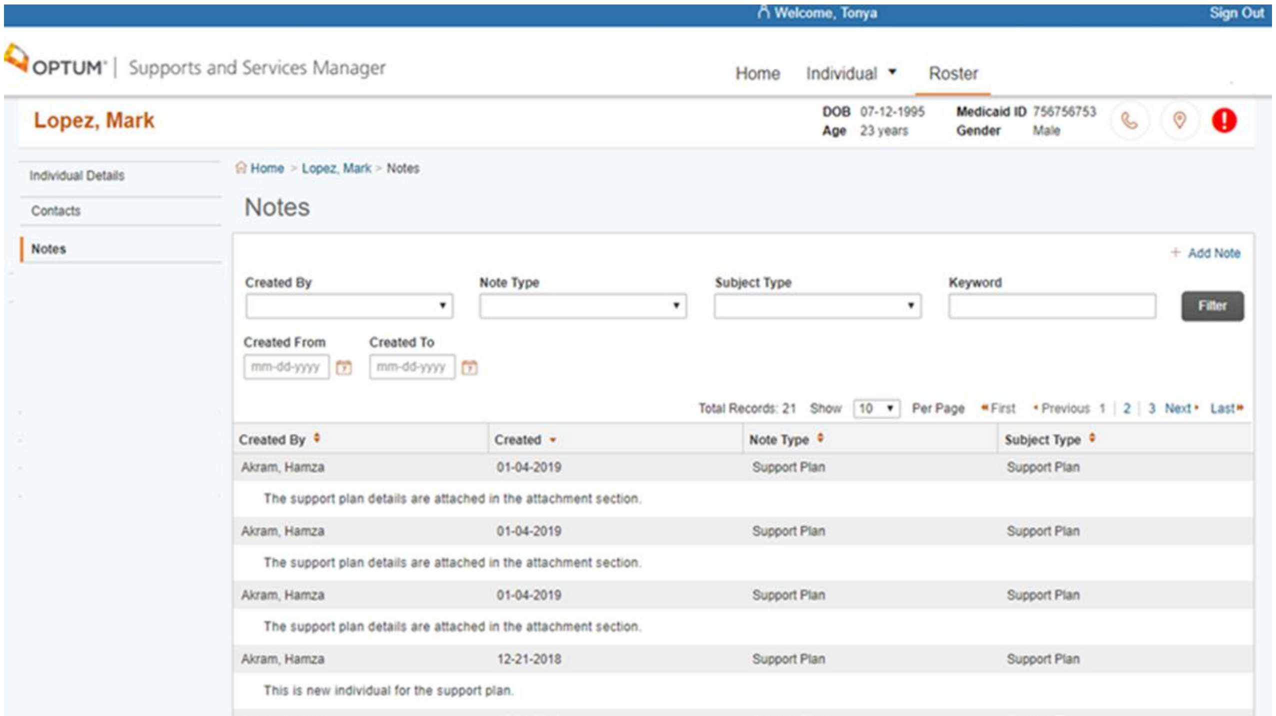
Member Notes



Notes can be entered in other parts of the member's record as well, such as in Contacts. To view all notes written for a member, regardless of where in OSSM, the TCC/Facilitator can navigate to the Notes page in the member record and click the Notes page. Only notes added to the Plan can be shared in the portal.

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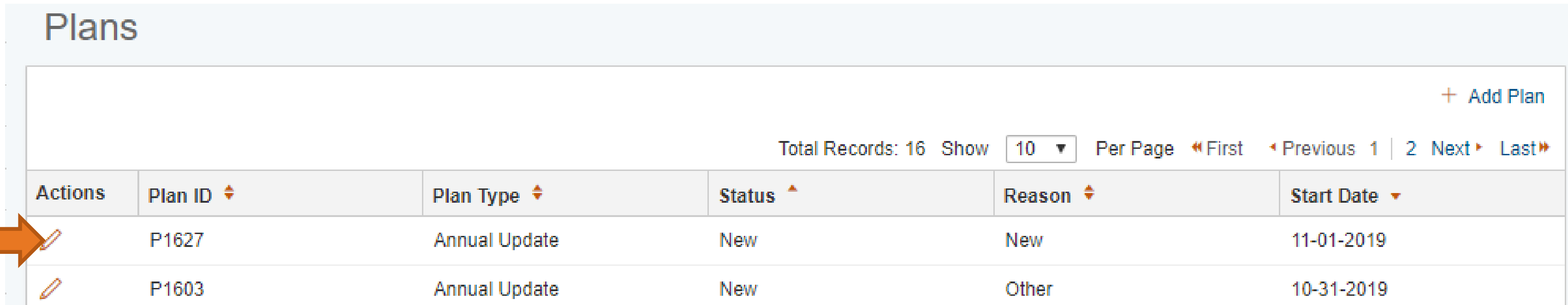
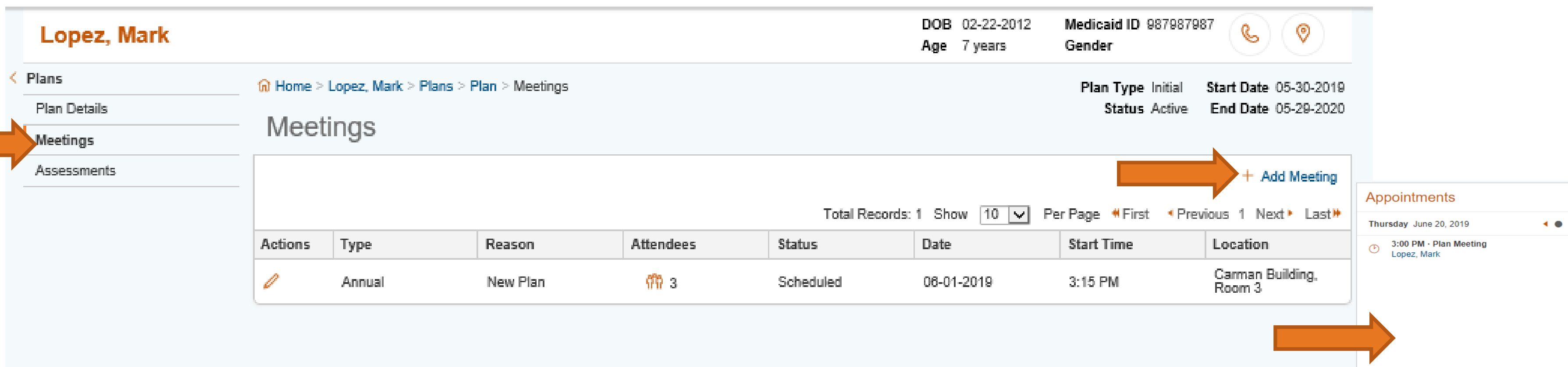
Meetings





TCCs/Facilitators use the Meetings feature to document the Child and Family Team meeting, which Optum reviews with the person-centered service plan. Select the plan that has been saved. Click on Meetings. Click on Add Meeting. These meetings are available in the portal for users to see and will also appear in your OSSM Dashboard in the Appointments Widget.

A documented meeting date within the previous 90 days is required to submit a PCSP in OSSM; please document meetings to reflect interactions with the Child and Family Team.

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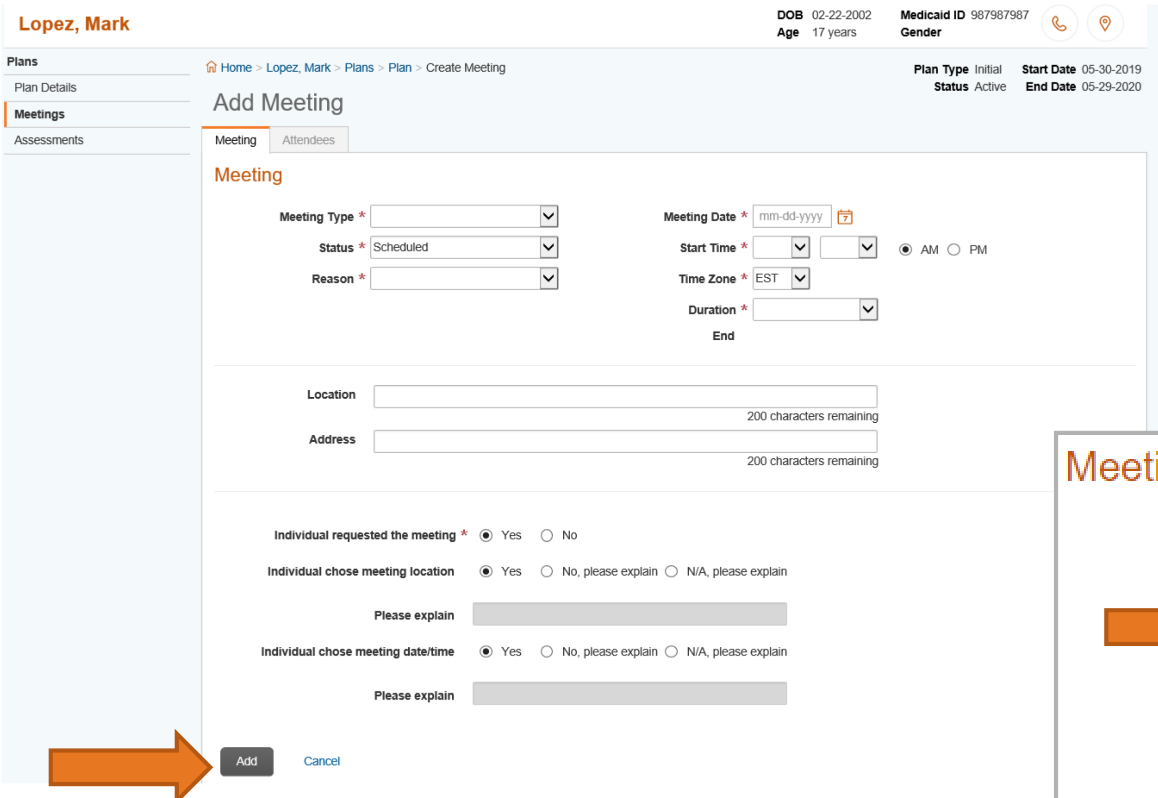
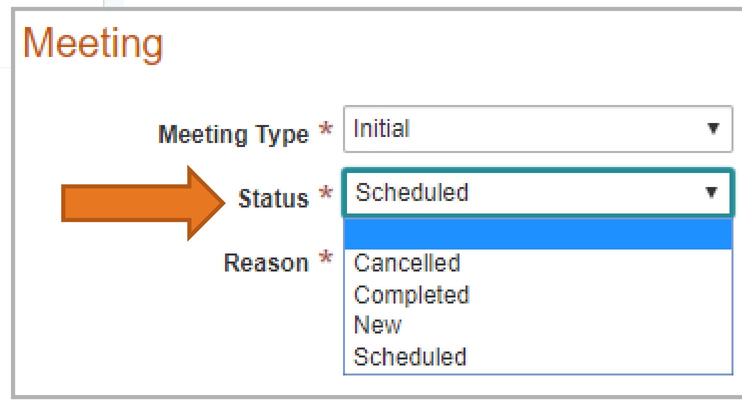
Add New Meeting

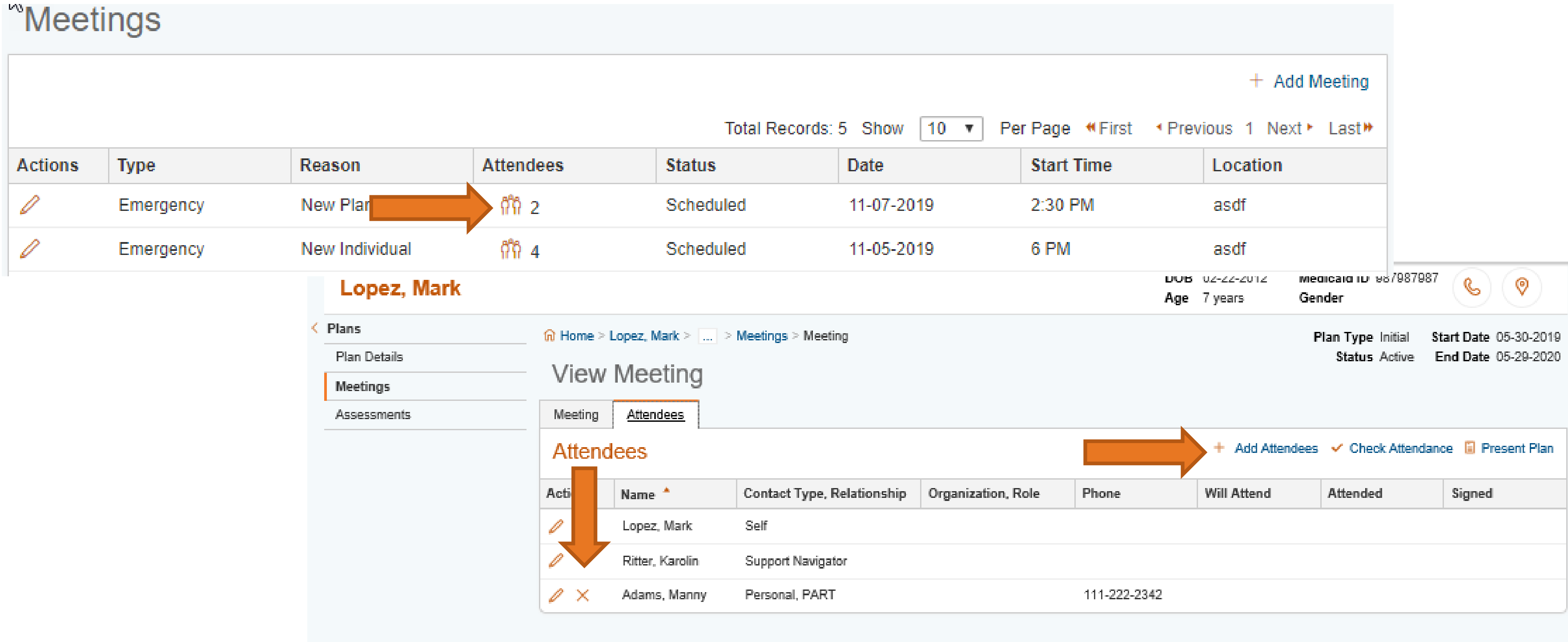




The TCC/Facilitator completes the meeting details page, above, and indicates in the section at the bottom of the screen whether they have met CFR requirements to have the meeting date, time, and location at the direction of the member. Click Add to save the meeting.

- When selecting the meeting Status, choosing **New** or **Scheduled** will allow the option to add additional attendees.
- Choosing **Cancelled** or **Completed** will <u>not</u> allow for the option to add additional attendees.

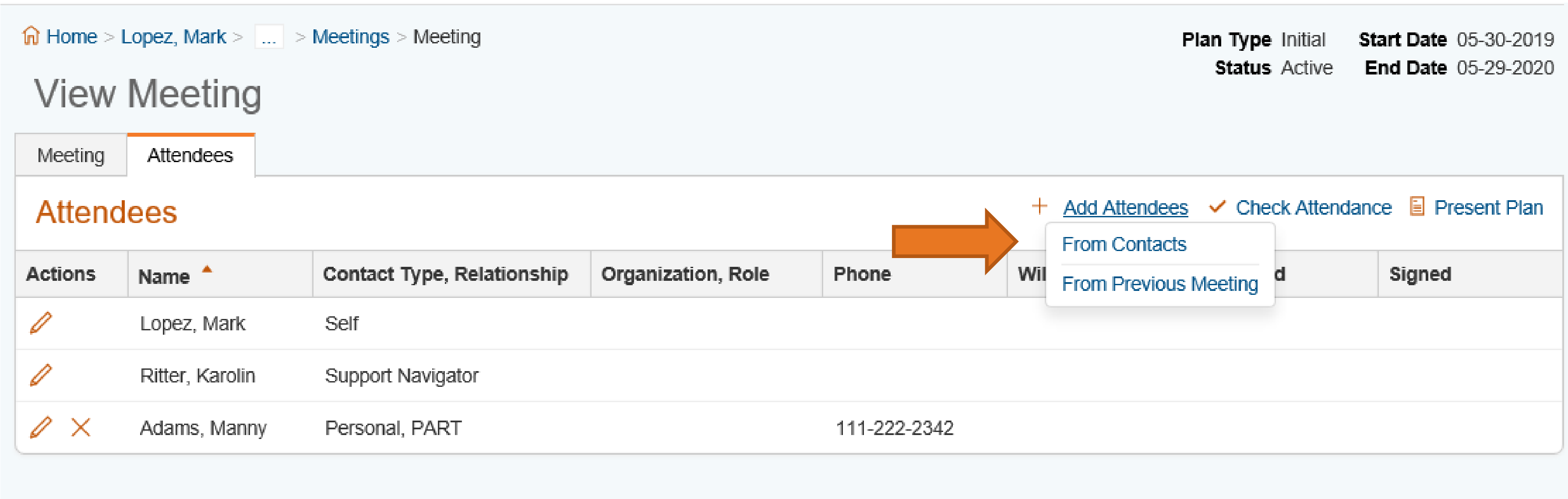
Meeting Attendees



After saving the meeting, click on the attendees symbol. Click on Add Attendees to attach members of the Child and Family Team that attended. In order to attach participants to the meeting, they must be set up as Contacts in the member's record. All meetings will appear in the portal as well. TCCs/Facilitators can track who is invited and who has confirmed, who attended and how, and whether the PCSP was given to them at this time and by what method (paper copy, emailed, mailed etc.).

When a meeting is created, the TCC/Facilitator and member are automatically included as attendees and other CFT members have to be added. To remove an attendee from the meeting, click the "X" next to their name. If the member did not attend the CFT meeting, please state that in the PCSP and provide a brief explanation.

Adding a Meeting Attendee



Click on Add Attendees to add participants to the CFT meeting. Select either From Contacts or From a Previous Meeting.

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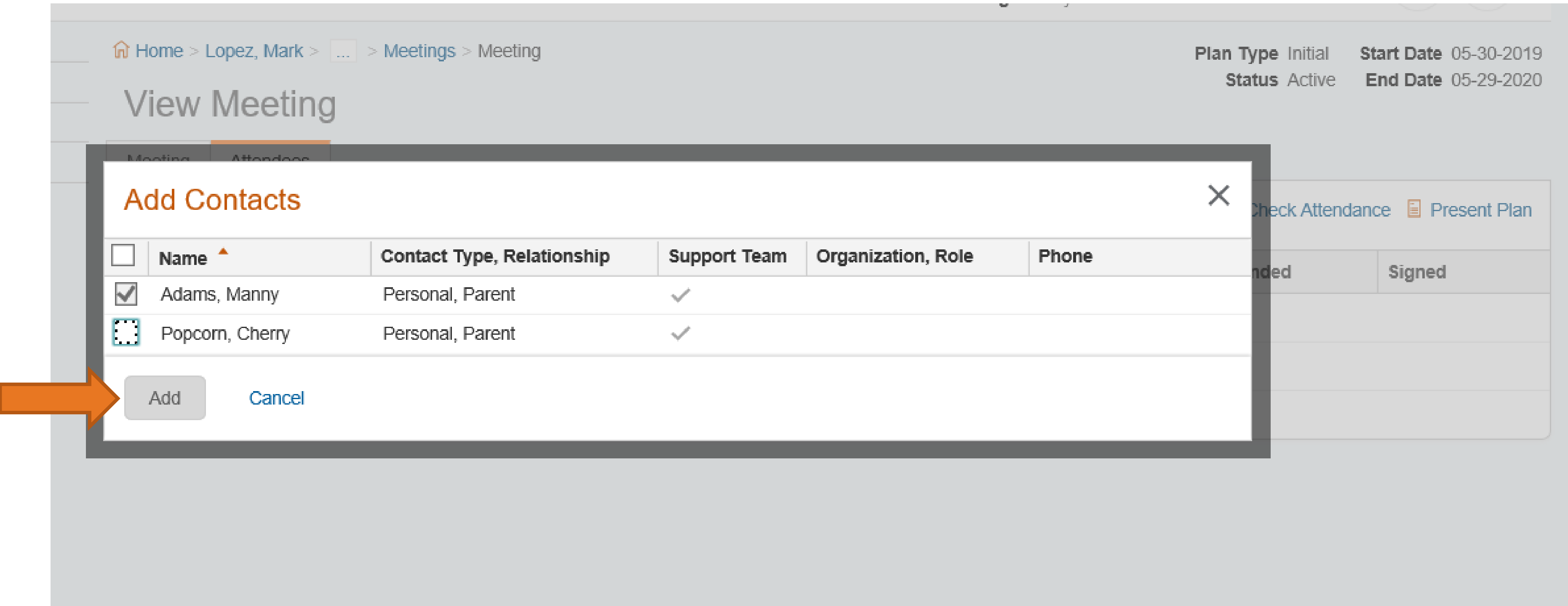
Select Meeting Attendees From Contacts



If you click From Contacts, the list of contacts attached to the member are displayed. Click the checkbox beside each contact name that you wish to add to the meeting. Click Add to save the selections.

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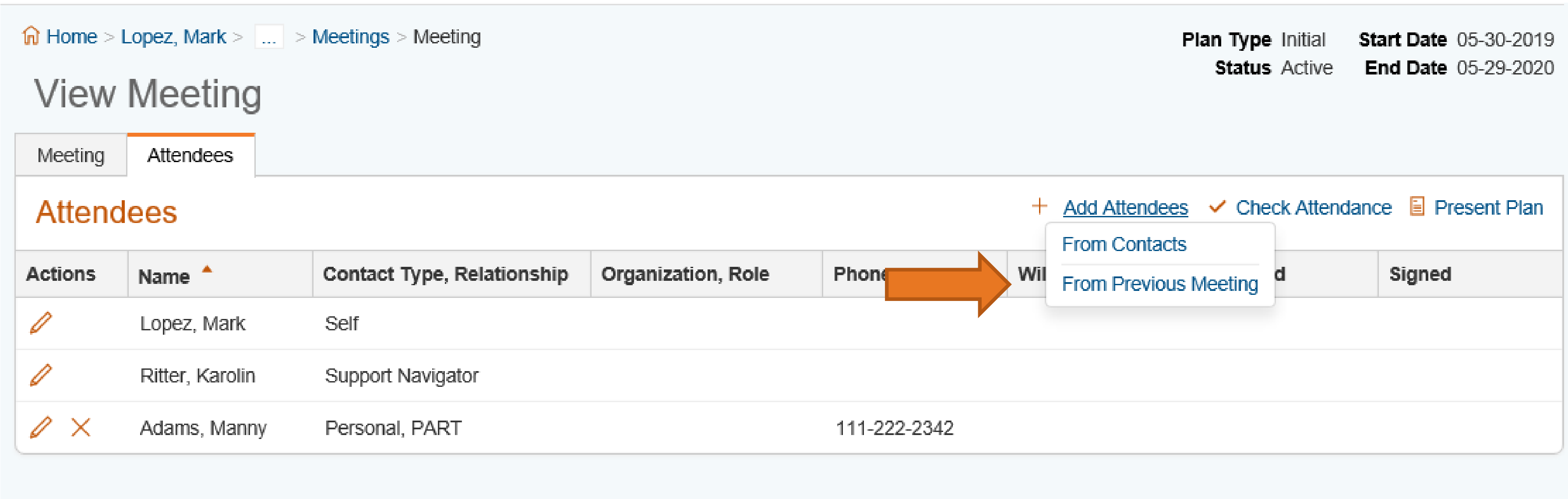
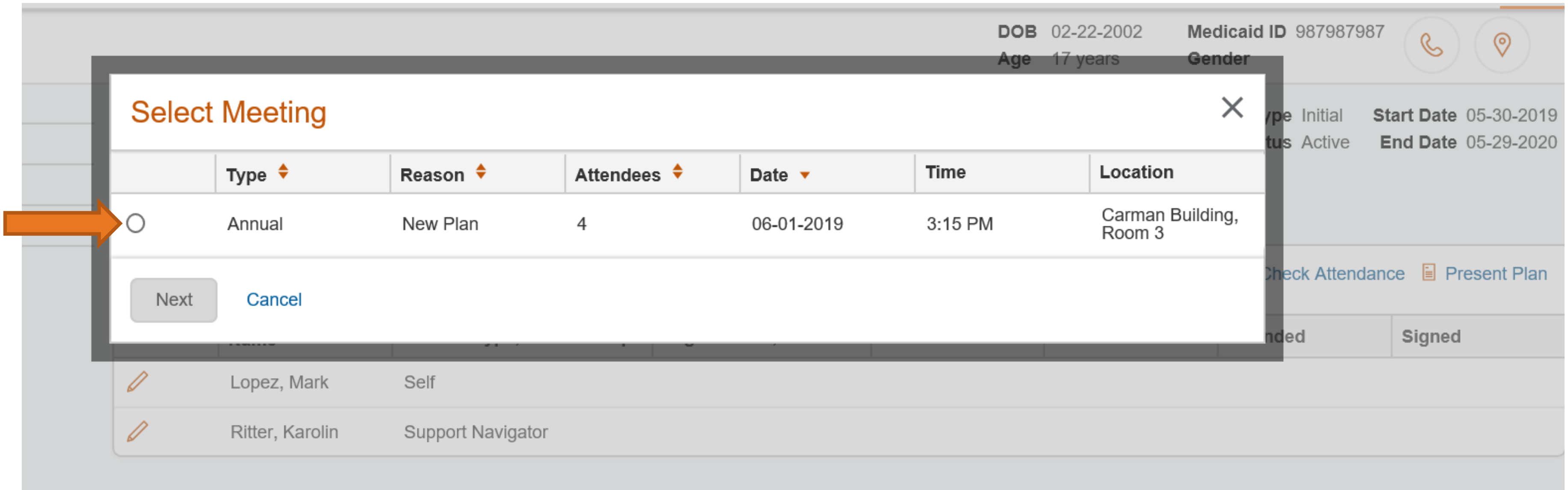
Adding a Meeting Attendee



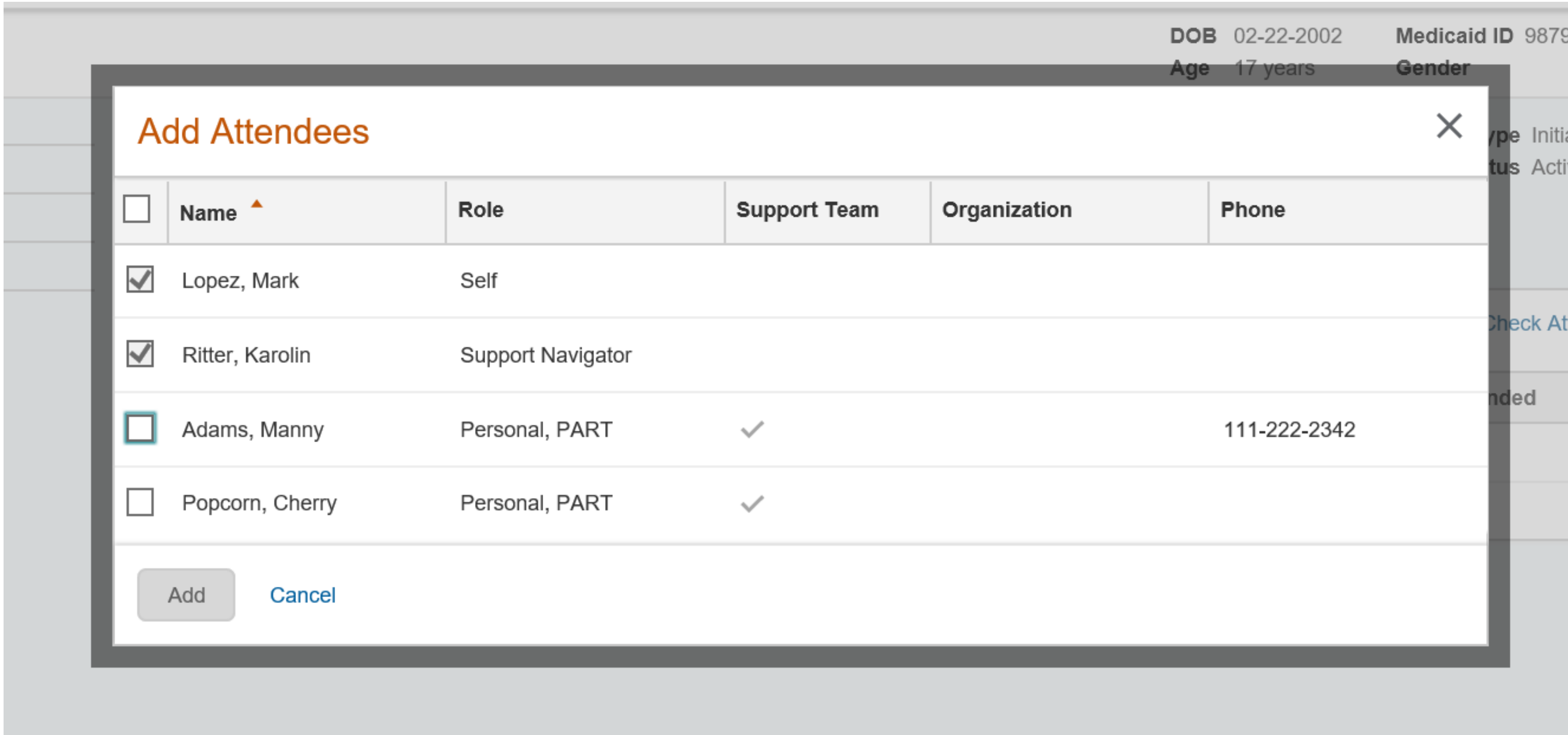
If you clicked **From Previous Meeting**, the **Select Meeting** box will pop up, shown on the next page.

Select Meeting Attendees From Previous Meeting



If you clicked **From Previous Meeting**, the **Select Meeting** pop up will appear. The TCC/Facilitator can select which meeting they wish to copy attendees from by clicking on the radio button beside the meeting record. OSSM will copy the attendees from the selected meeting into the current meeting.

Select Attendees From Previous Meeting



The meeting attendees from the prior meeting are displayed. Click **Add** to add all check marked attendees or click on the checkmark boxes beside each name to select or de-select.

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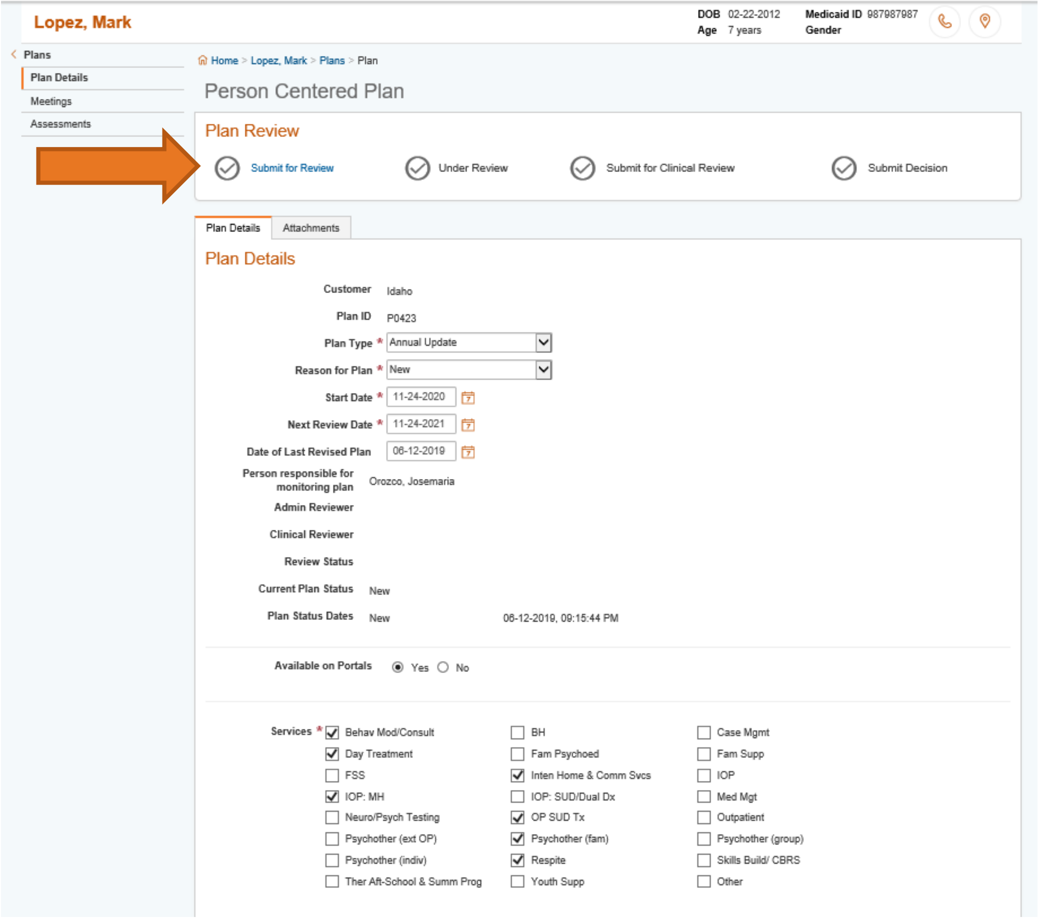
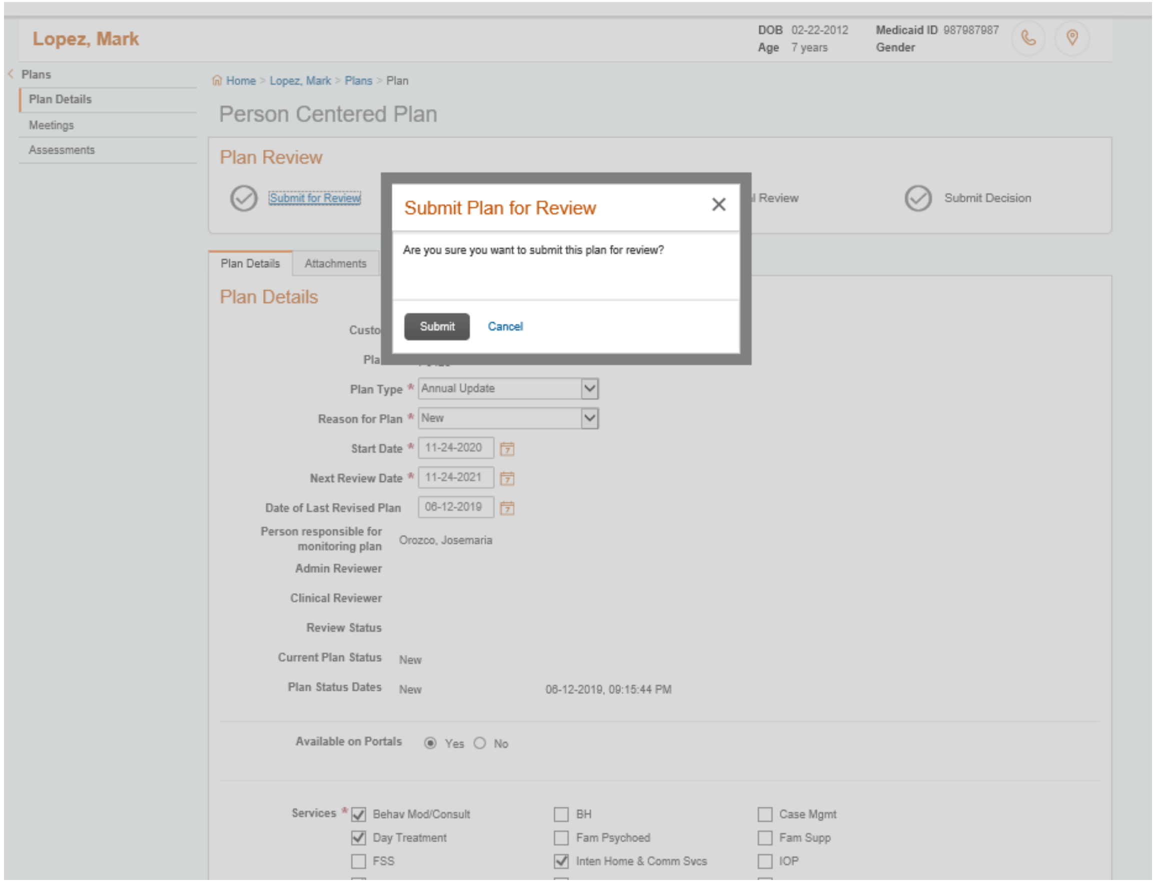
Submitting the Plan for Review



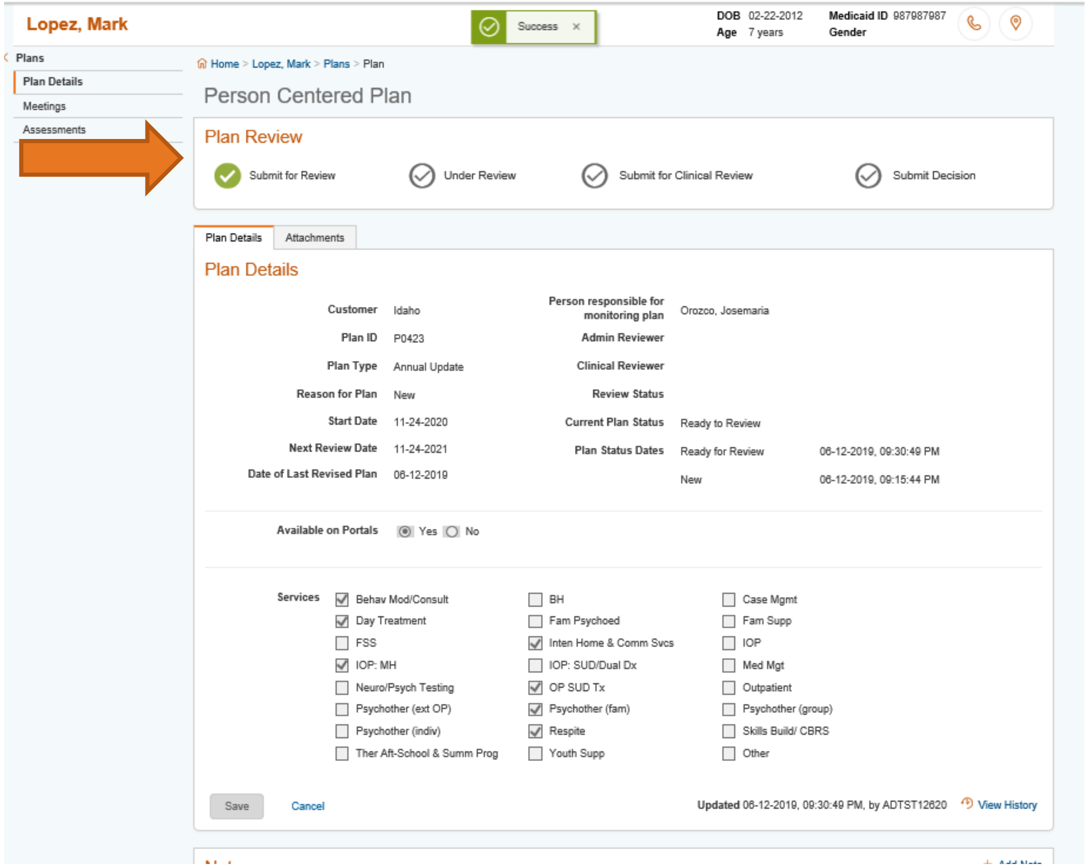
Once the TCC/Facilitator has attached the PDF of the plan to the system, it can be submitted for review. The user navigates to the Plan Details page and clicks on the words “**Submit for Review**” at the top of the screen (checkmark will be grey at this time).

Submitting the Plan for Review



The TCC/Facilitator is prompted to confirm they want to submit the plan for review. If they select Submit, the plan will become read only and the plan will enter the Review Queue.

Plan is Submitted for Review



Once the plan is submitted for review, the green checkmark appears beside the **Submit for Review** in the Plan Review box. You will notice that the Current Plan Status is now “Ready to Review”. This means that the plan is waiting in the Plan Review Queue for an Optum Admin Reviewer to select it for review. (Note: Optum has 5 business days to review PCSPs.)

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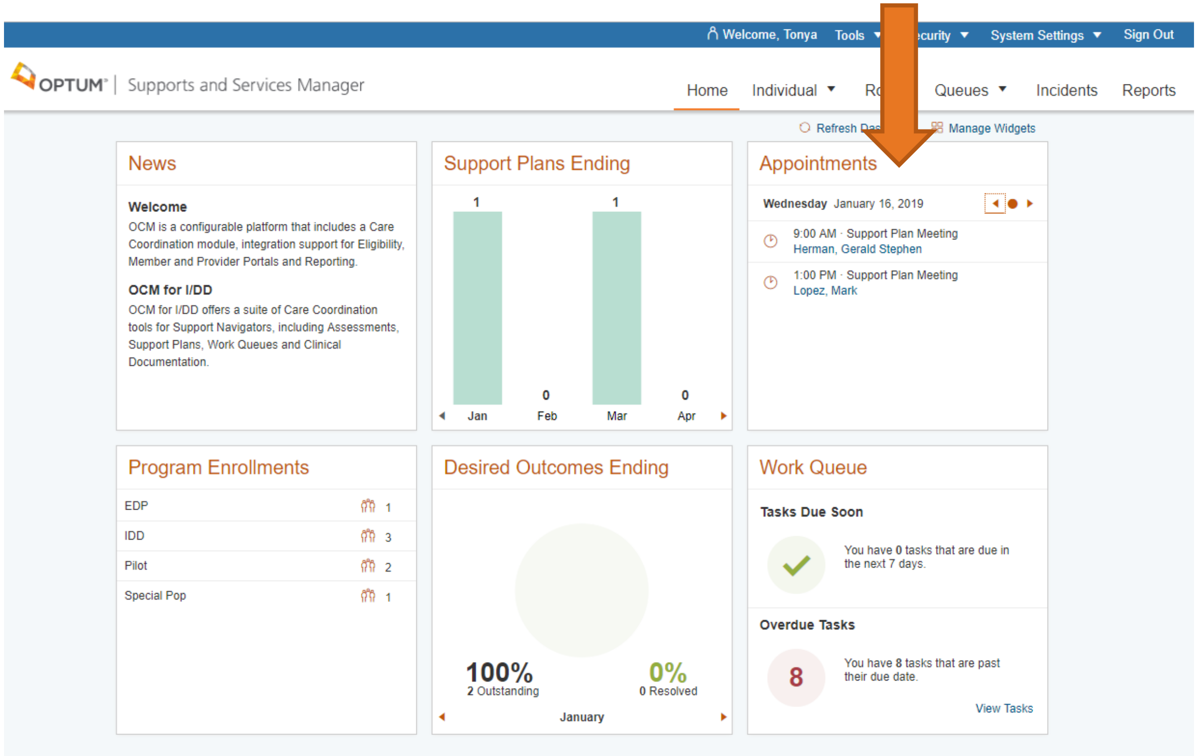
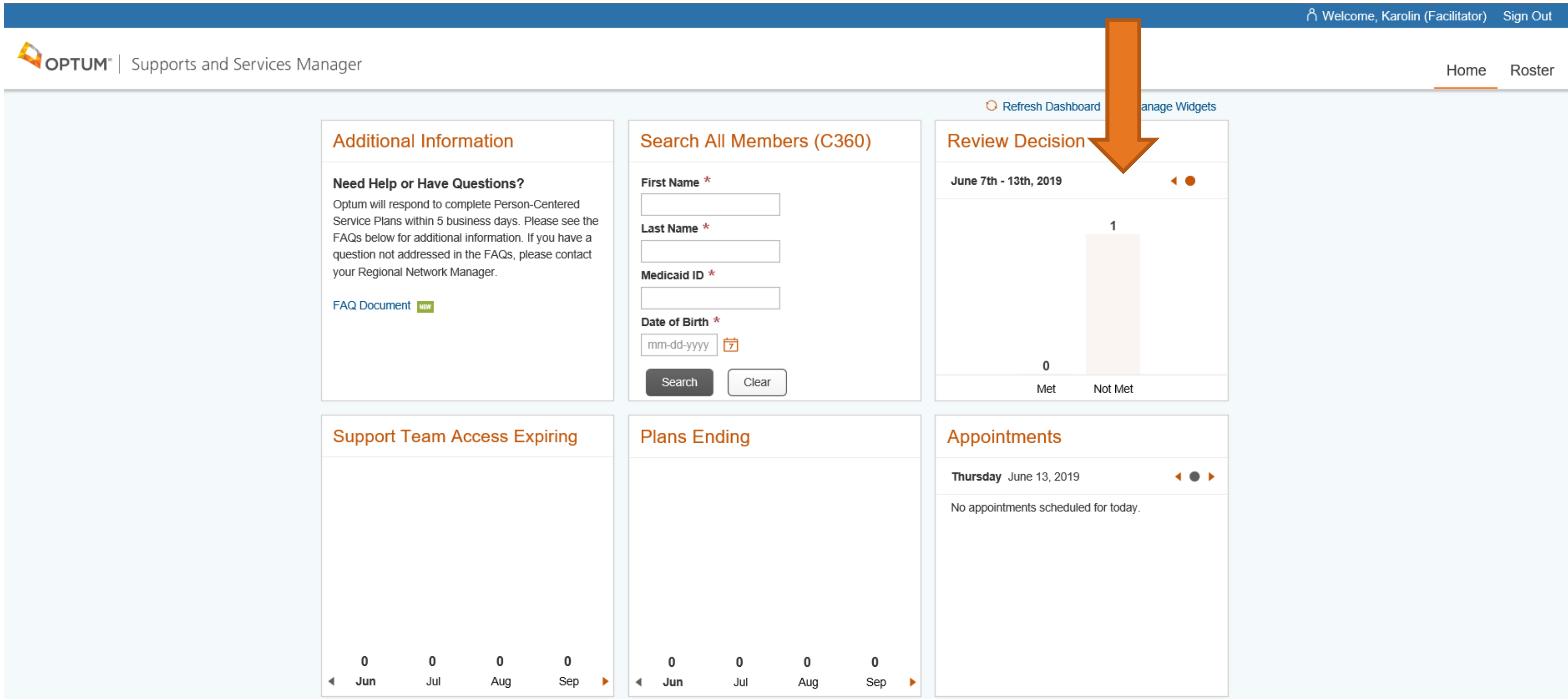
Meeting Reminders Widget



The TCC/Facilitator can see today's meetings on the main dashboard under Appointments. The user can scroll back and forth by day to see other appointments and can click on the clock symbol to open the meeting details or on the member name to open the member's record.

Checking on the Status of the Reviews



The TCC/Facilitator can check back in to OSSM periodically to see the outcome of the review. **(Note: Optum has 5 business days to review PCSPs.)** There will be a dashboard of review decisions made in the last week for the user to see, and the TCC/Facilitator can click on the graph's bars to drill down to the plan to see the CFR Review and if the decision is Met or Not Met.

Once the plan has met CFR Review criteria, then the plan is automatically published to the portal for those granted access. At this point, the plan can no longer be edited; a new plan record with a new attached PCSP in the PDF format must be submitted if there are any revisions.

TCC/Facilitator User

Other Functions in OSSM

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Submitting a Revised, New or Amended Plan

If you wish to enter a new or revised plan for the member, you may go through the Add Plan steps again starting on page 27 in this document. Once you submit the new plan and it is marked as Met CFR Review requirements:

- The plan status of the prior active plan will turn to Deactivated
- The plan review status of the new plan will be Met
- The plan status of the new plan will be Active and the attached PCSP will be visible on the portal (to those granted access)

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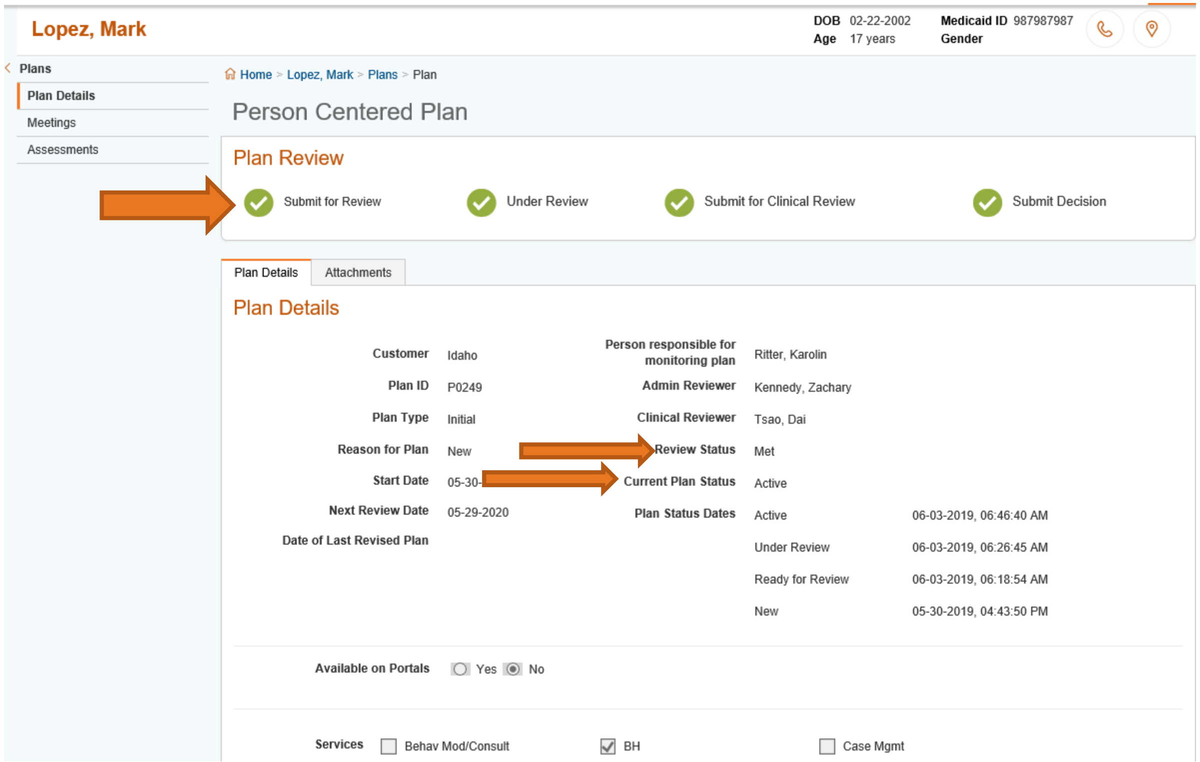
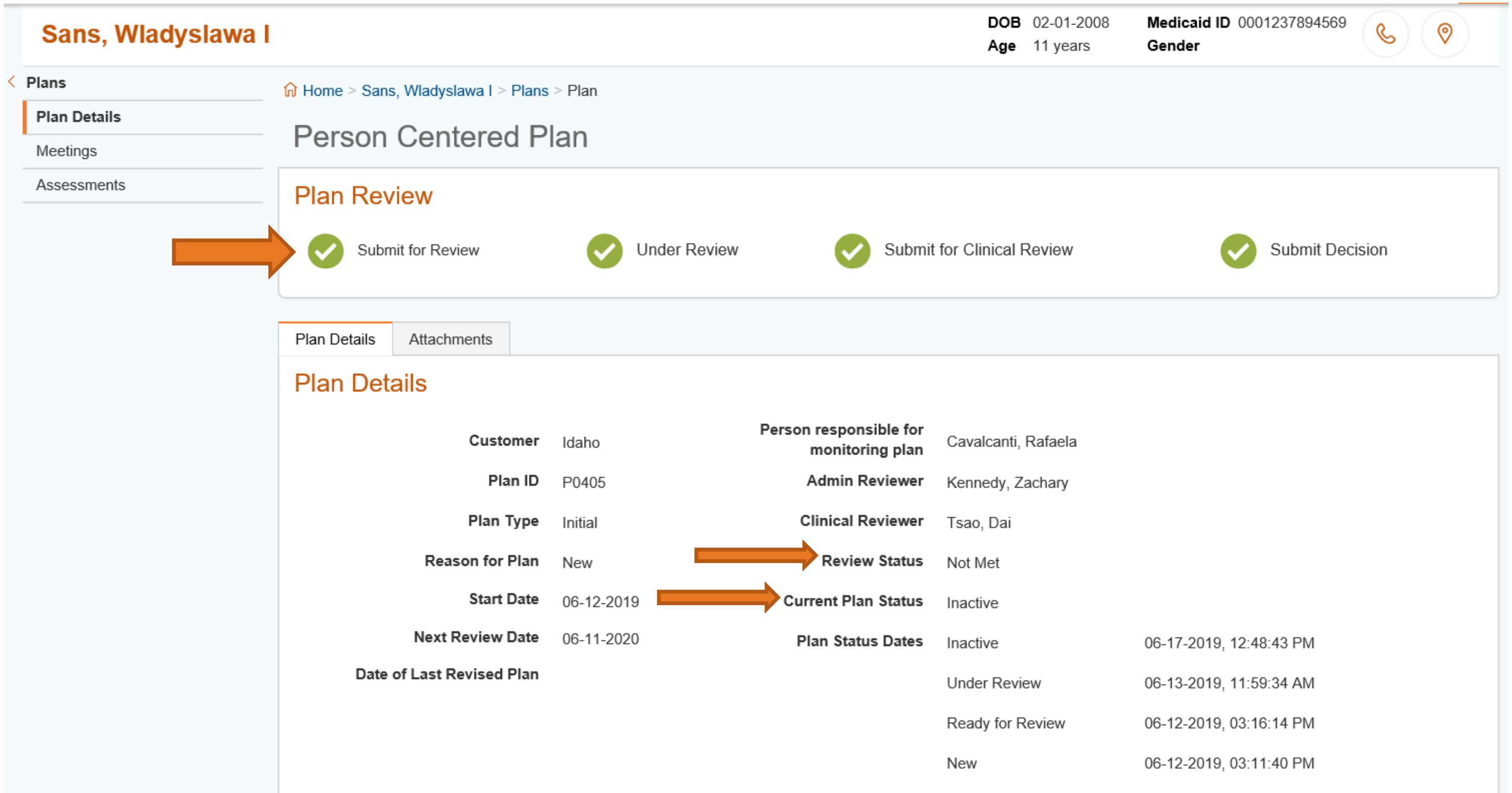
Plan has Met CFR Review Criteria



Once a plan has been submitted for review by the TCC/Facilitator, it will be reviewed and if it has met the CFR Review criteria, the following occurs:

- All Plan Review steps will have a green check mark
- The Review Status changes to **Met**
- The Current Plan Status changes to **Active**
- The plan details will not be able to be edited; however, the TCC/Facilitator can still add notes and meetings
- The plan PDF will be visible now in the portal to those granted access

Plan Does Not Meet CFR Review Criteria



If the submitted plan does not meet CFR Review criteria, the following occurs:

- All Plan Review steps will have a green check mark
- The Review Status will be **Not Met**
- The Current Plan Status will be **Inactive**
- The plan will NOT be visible in the portal

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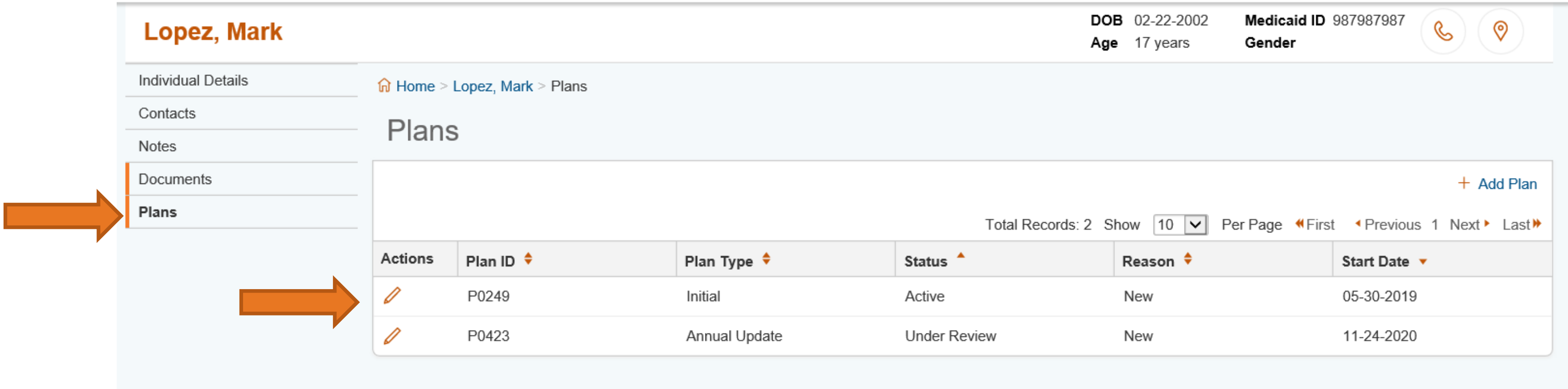
Plans and Statuses



TCCs/Facilitators can see the list of PCSPs for a member by clicking on the Plans section within the member's record. The list of plans that are in progress or have been submitted for review are listed above. You can see the plan ID assigned to each plan, the current status of the plan, and the start date of the plan. Click on the pencil beside the plan ID to open the record and attached plan. The most recent plans are at the top of the list.

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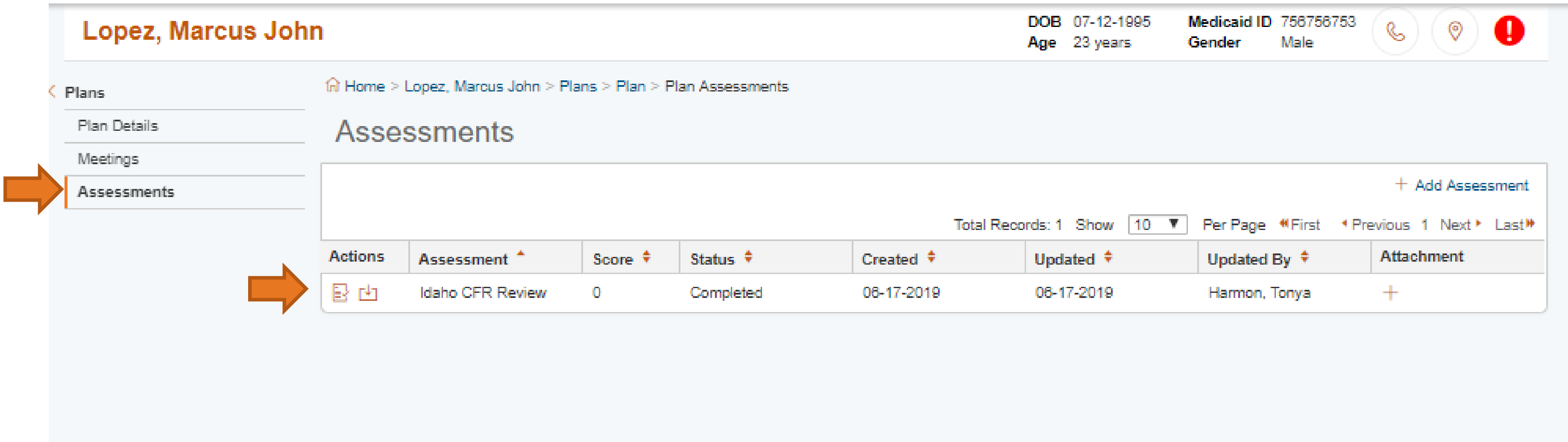
View CFR Review



The CFR Review can be viewed by the TCC/Facilitator from within the Plan. From within the member's Plan record, click on Assessments, then on the icon to the left of the Idaho CFR Review record shown above. You can view it on screen with the first icon or click the second icon to download it to a PDF.

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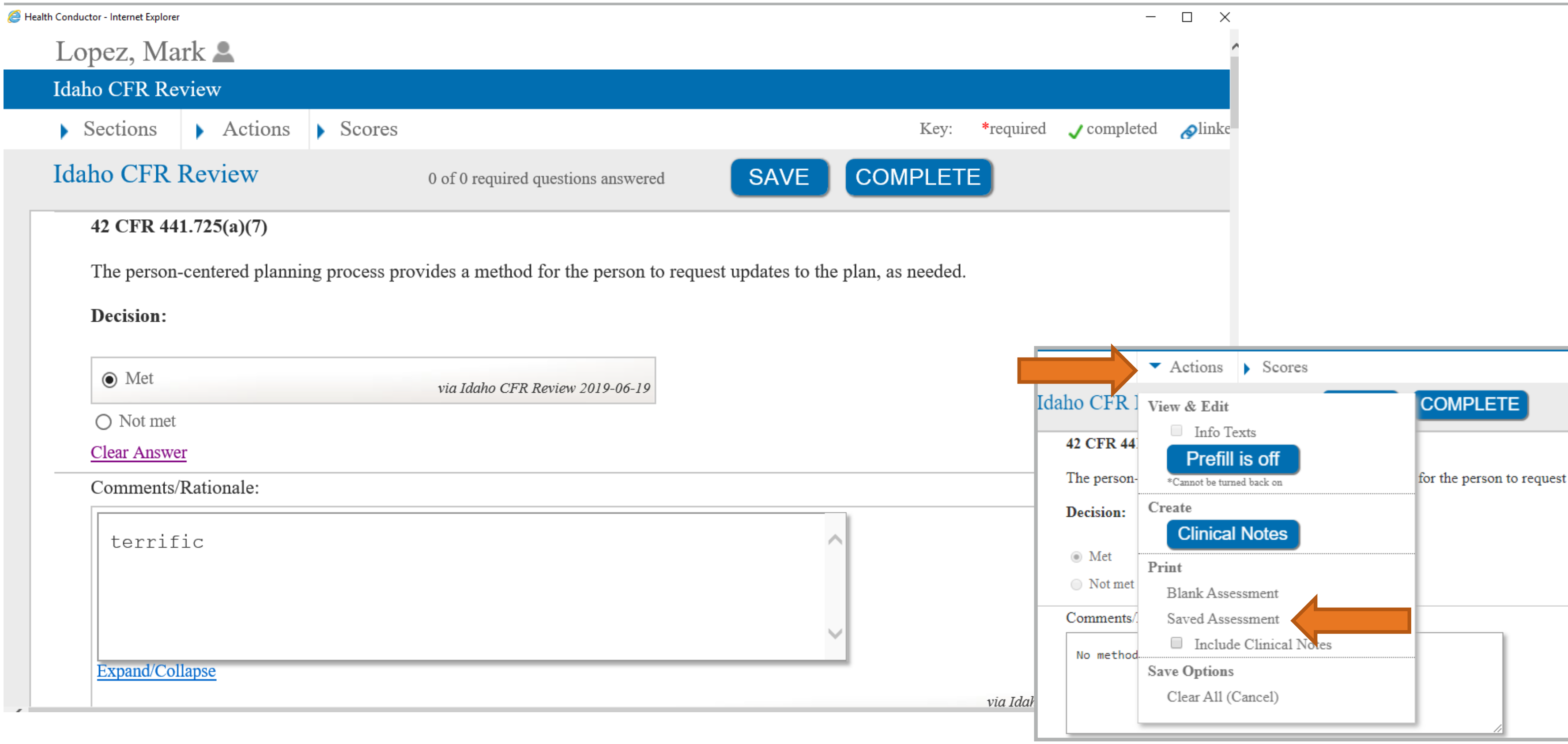
View CFR Review/Printing



When you click on the first icon to view the CFR Review, a window opens up and displays the review details.

To Print the CFR Review, select the Actions dropdown and choose Saved Assessment. The CFR Review will appear in a new window with a Print option.

Portal User

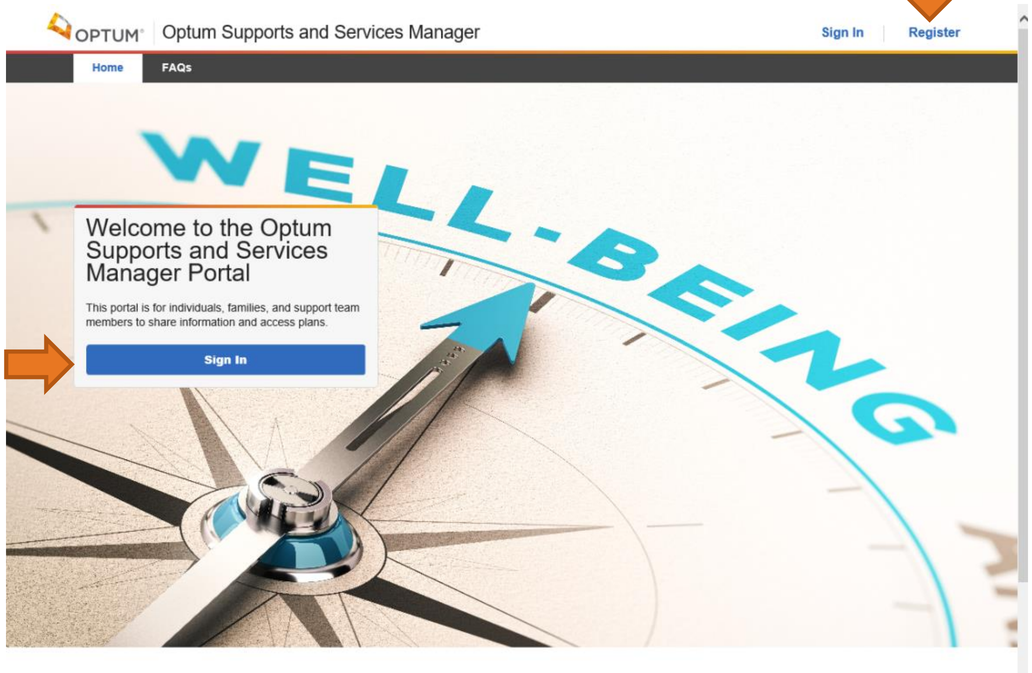
OSSM Portal

OPTUM®

Portal User: Idaho Portal Link and Sign-In Landing Page

Access to the OSSM Portal:

- Visit optumidaho.com > For Members > OSSM Portal for person-centered service plans (https://ossmportal.optum.com/en/home)



The portal user will click on the Sign In link in the blue box to enter the portal. Any technical or access issues should be sent to the TCC/Facilitator.

New portal users may select Register or the Sign In to create an Optum ID.

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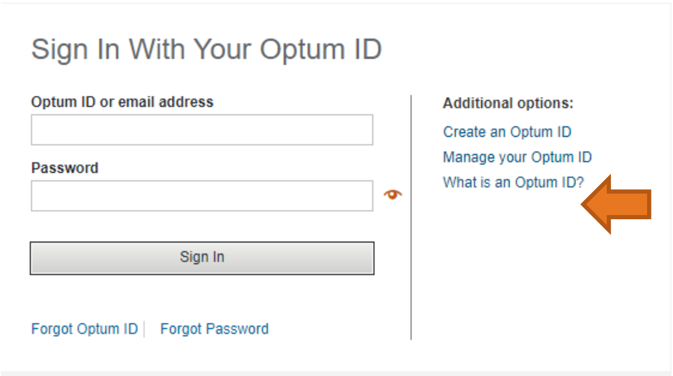
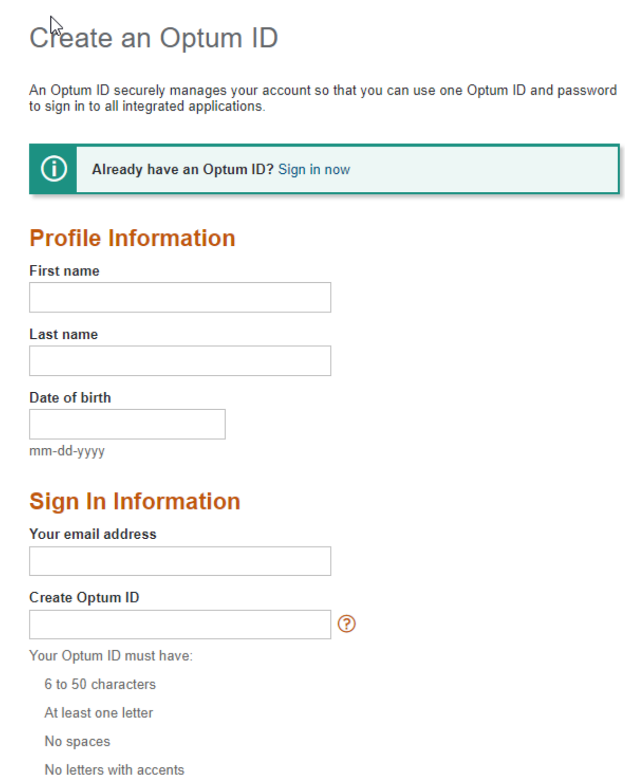
Portal User: Creating an Optum ID





The portal user is required to create an Optum ID to view content for which they have been granted access.

The portal user's first name, last name, and email must match what was entered by the TCC/Facilitator when the contact was created in OSSM. Portal users and the TCC/Facilitator may need to coordinate this contact information to ensure that it is accurate between the portal and how it reflects in OSSM.

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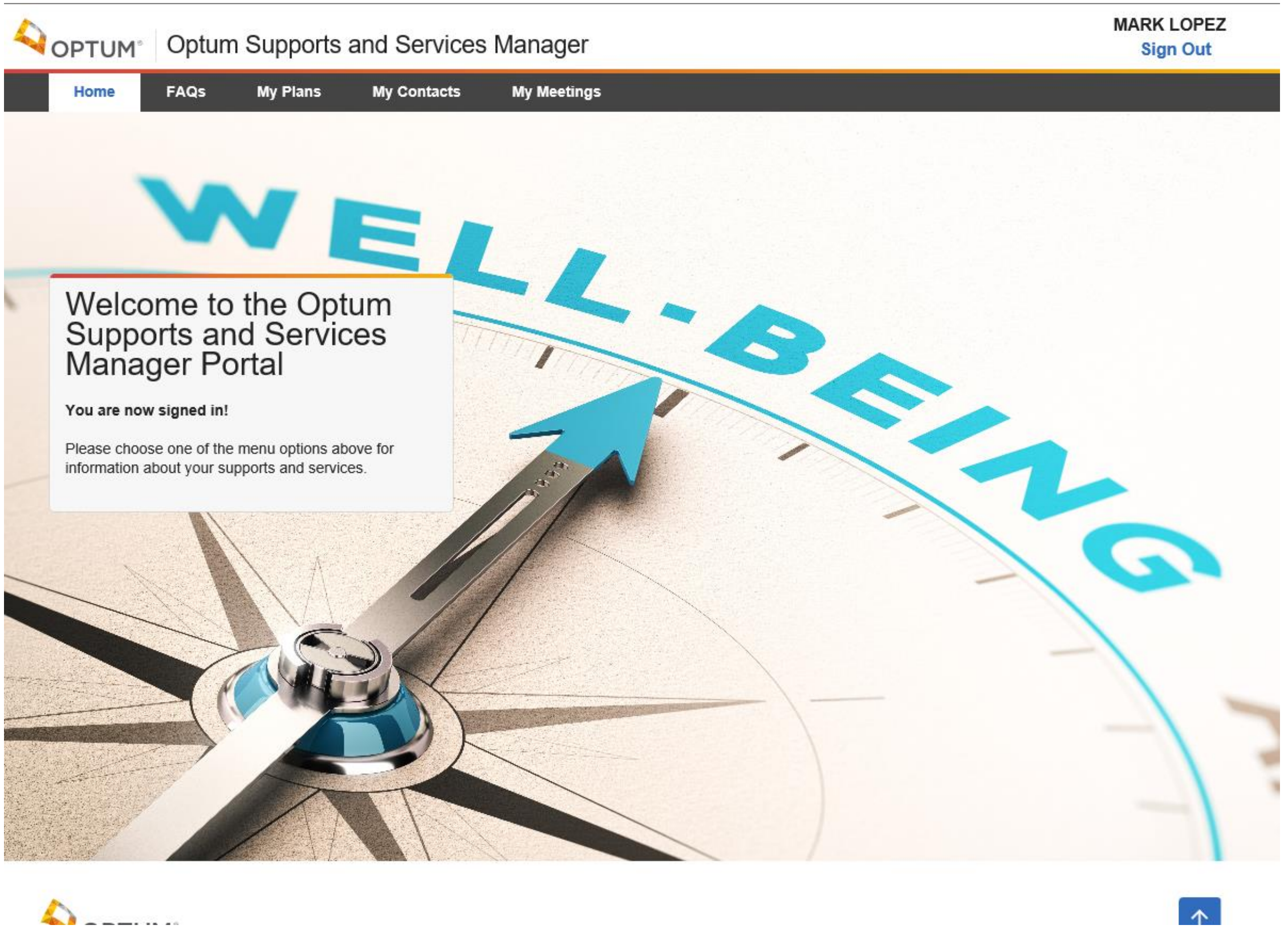
Portal User: Portal Sign-In Page After Signing In



Once the member/family has successfully signed in, they will see this message. The User will click on **FAQs**, **My Plans**, **My Contacts** or **My Meetings** to see more information.

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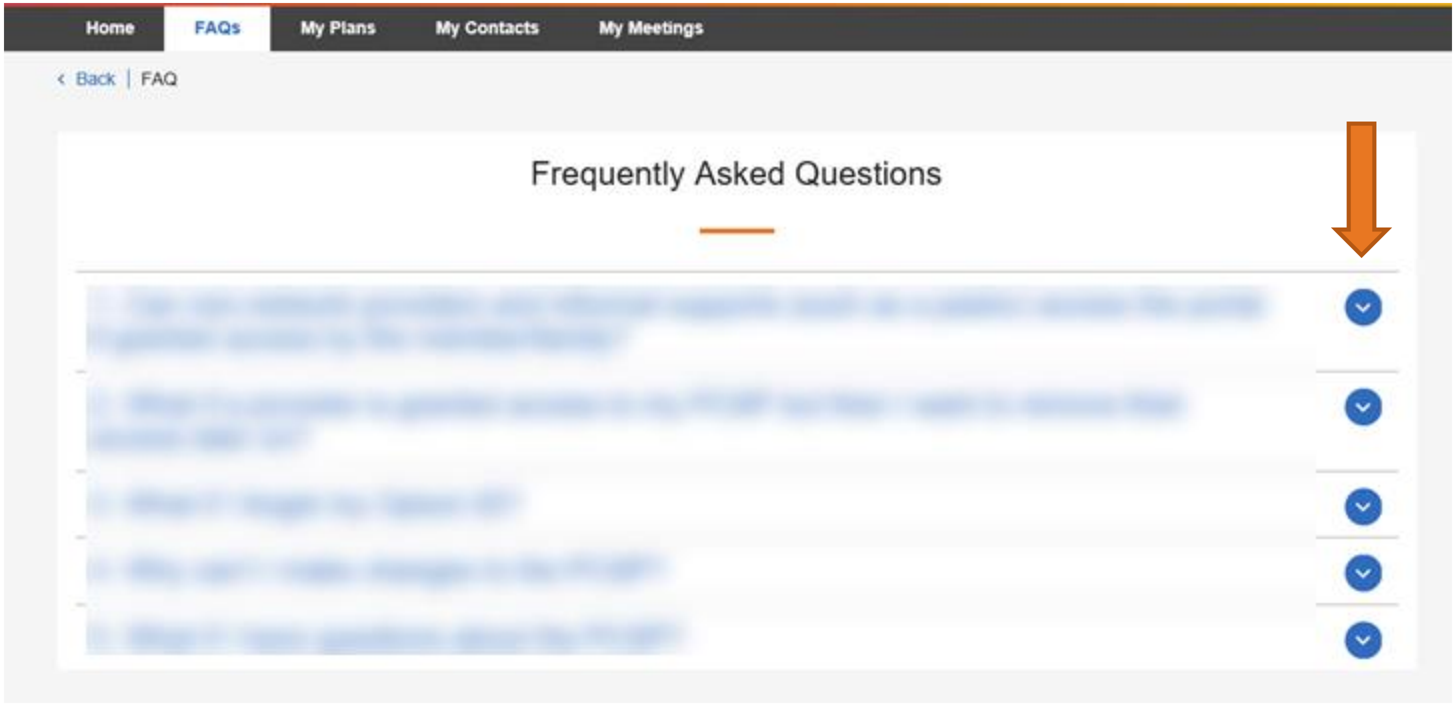
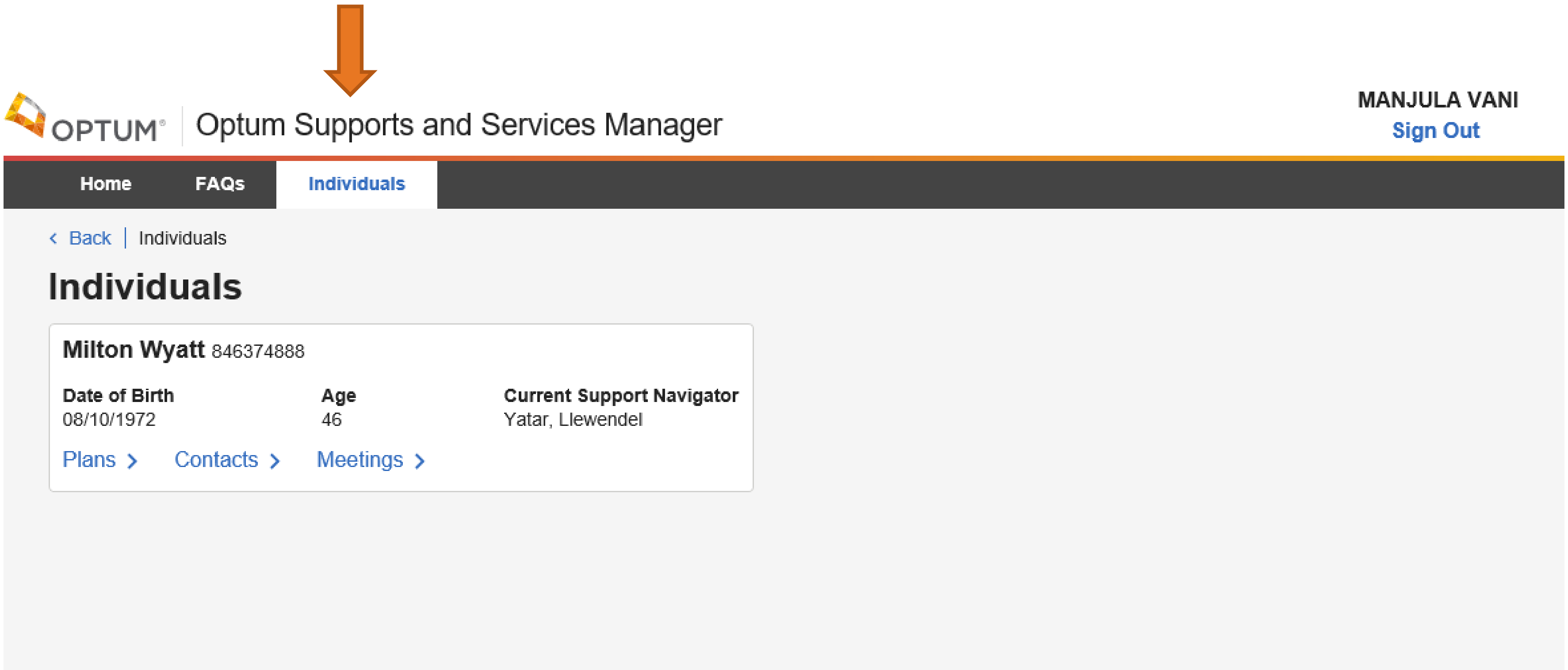
Portal User: Portal FAQs and Responses



The portal user clicks on the **FAQs** to see Frequently Asked Questions. The portal user clicks on the blue dot with the arrow to see responses to a question.

Portal User: Non Member Portal User Individuals Page



The non-member portal user will see an option **Individuals** on their menu bar**.** The user can click on **Individuals** to see information about the member records to which they have been granted access. If the user is a support team member or family member, they will see all members to which they have been granted access.

In order to gain access to a member's record, the member or their primary responsible person must sign and submit an ROI/PCSP OSSM Consent to the TCC/Facilitator in order to permit access to the member record.

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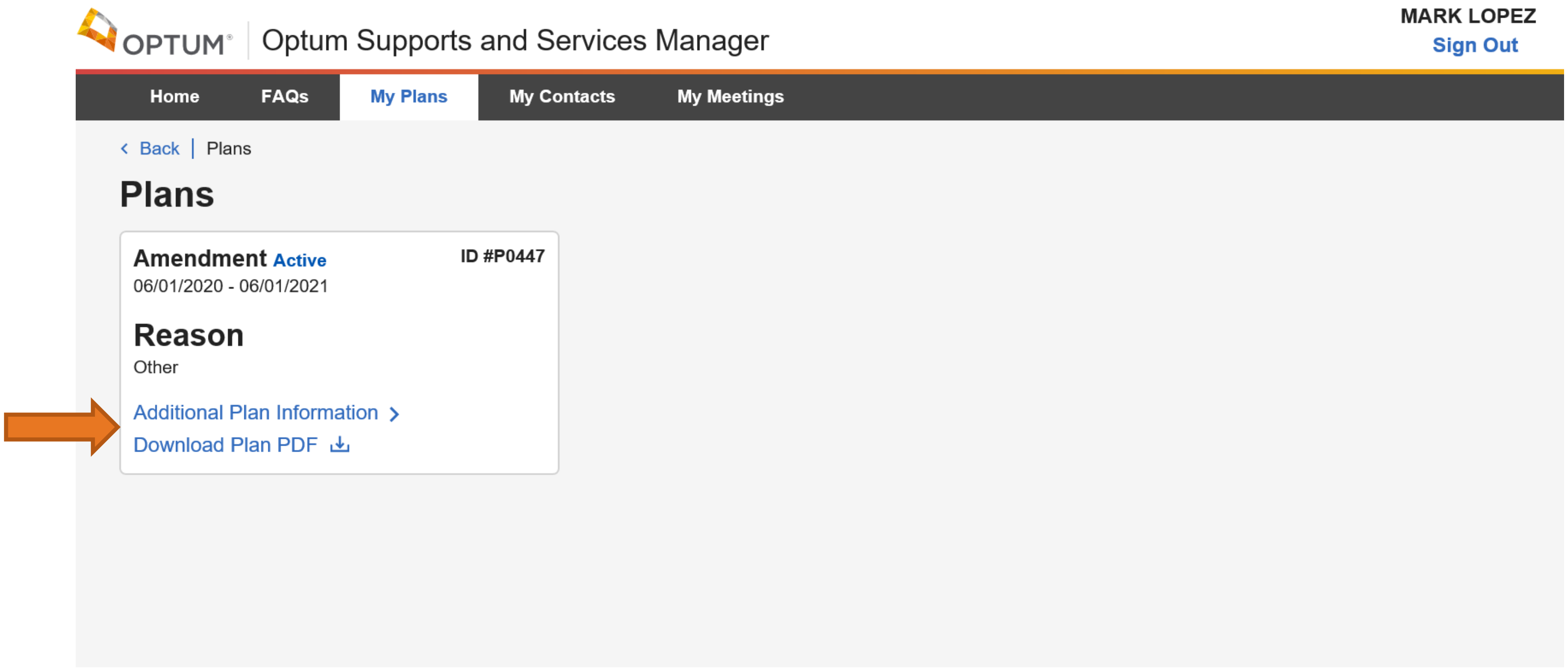
Portal User: Portal/My Plans



The member can see their plans by first clicking on **My Plans** and then **Download Plan PDF** or **Additional Information** to see meetings, notes, and contacts.

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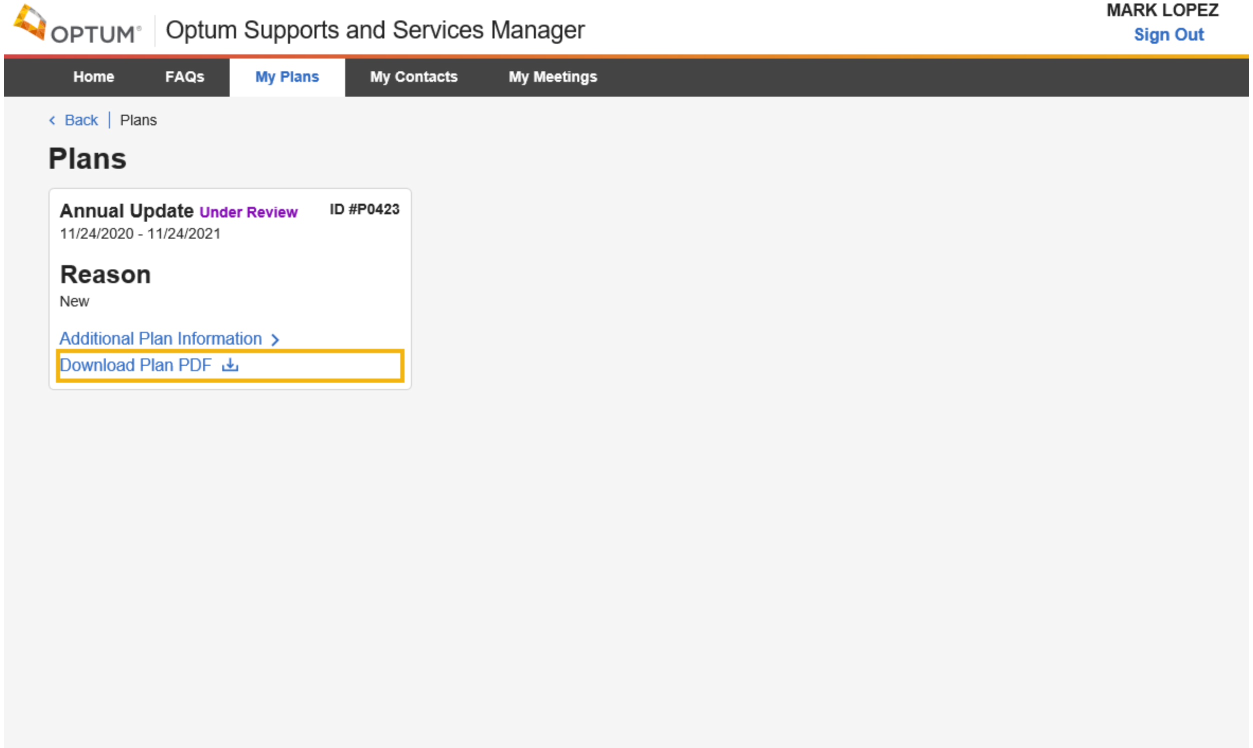
Portal User: Download PCSP PDF



The portal user can click on **Save**, **Save As** or **Save and Open** and the PCSP PDF will be saved to the desktop.

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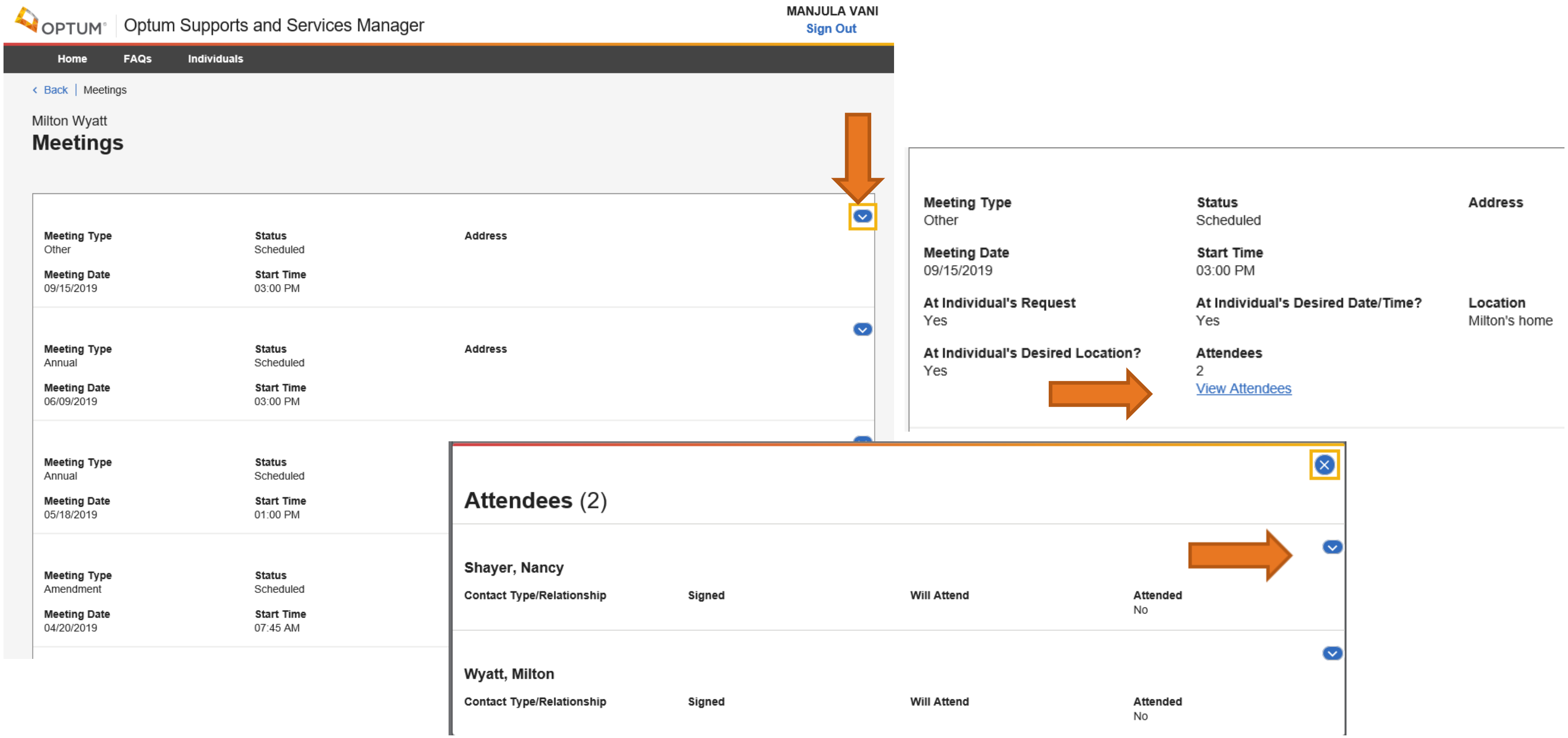
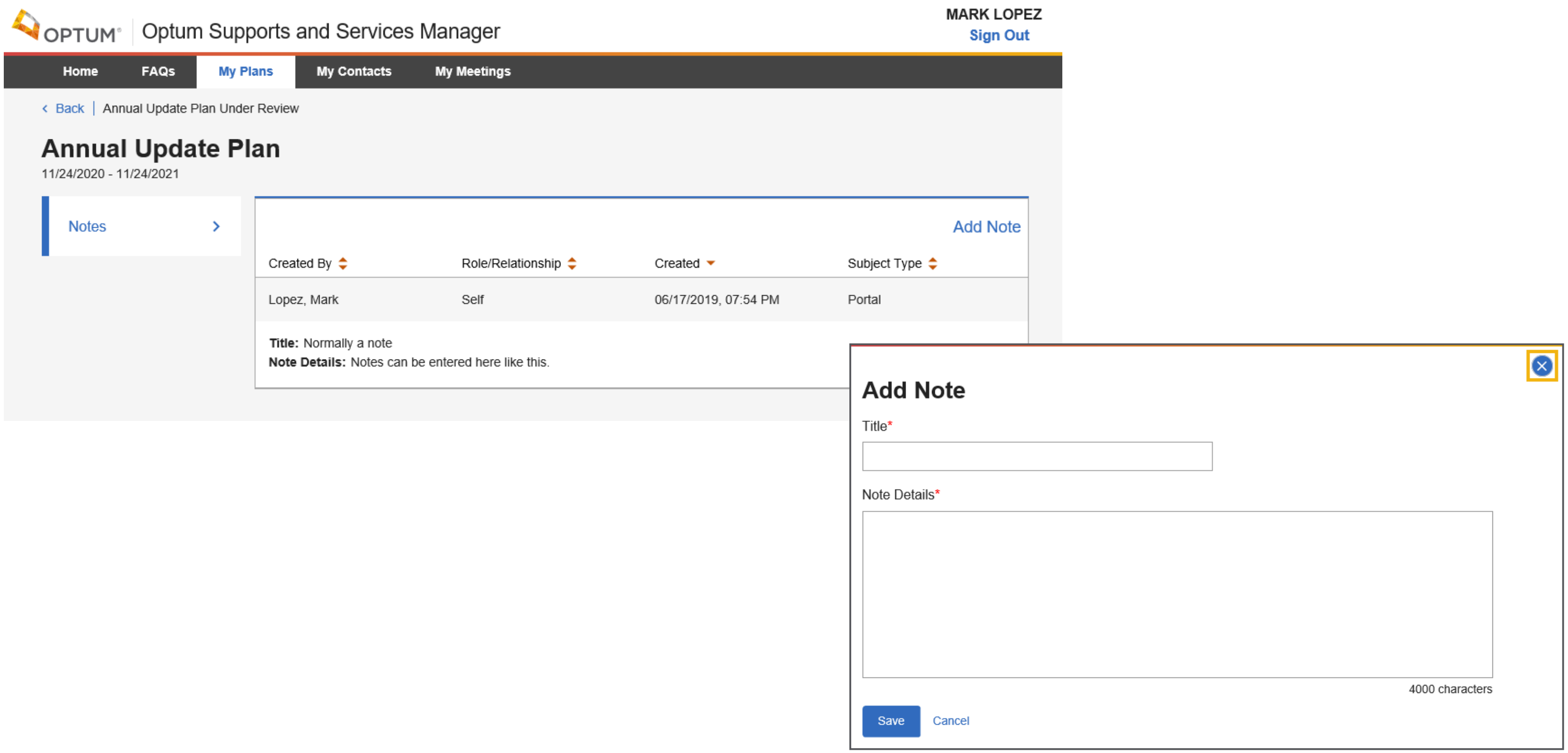
Portal User: Portal / Individuals / Meetings



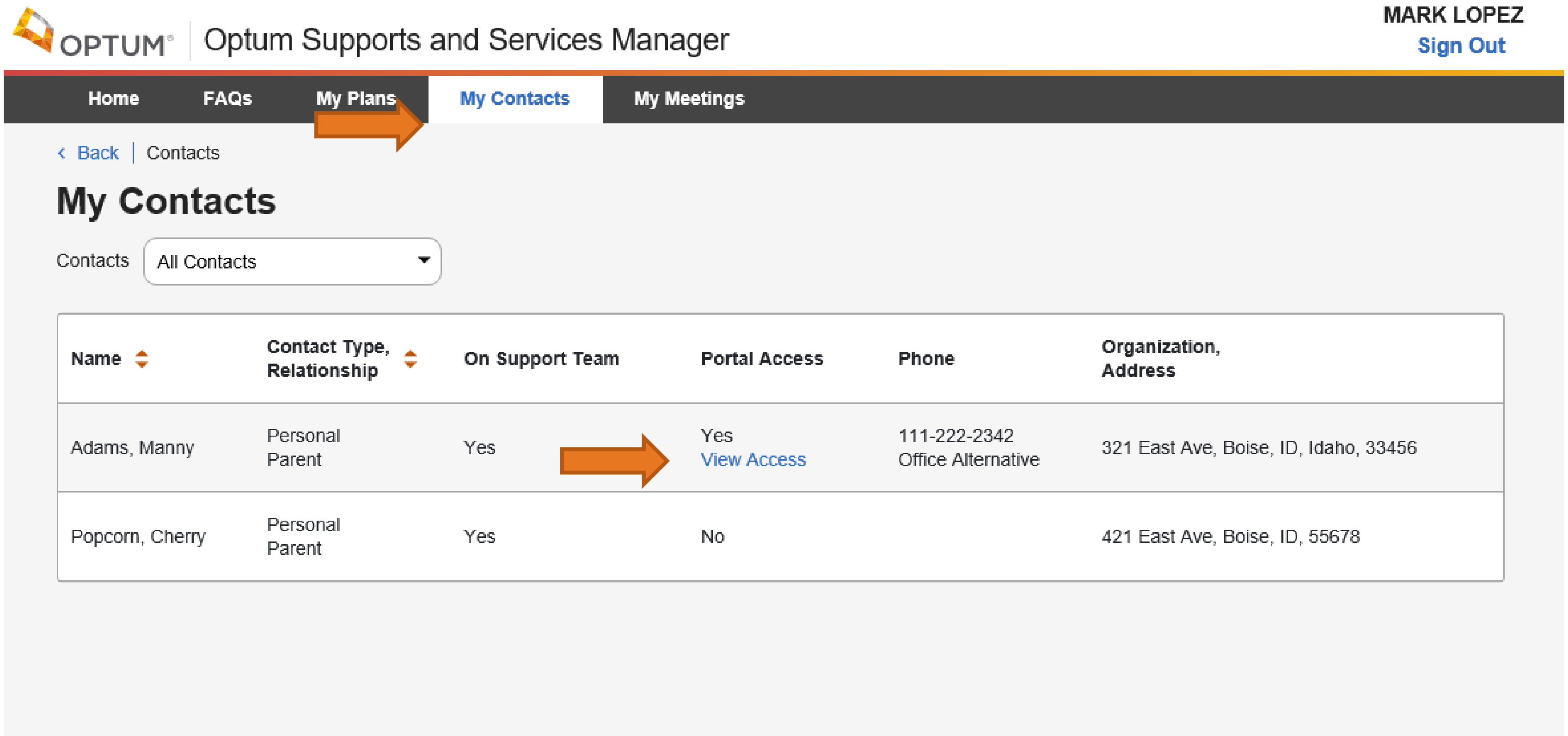
Portal users can see a list of meetings in chronological order. Clicking on the blue dot with the arrow inside to the right of the meeting will display additional meeting details. Clicking on the View Attendees link in the meeting details page will display details about people invited to the meeting. Clicking on the blue dot with the arrow inside in the Attendee record will display more information about the person's attendance.

Portal User: Portal/My Plans/Additional Information/Notes



Portal users can see a list of notes written related to the plan. The user can see the notes if they navigate to **My Plans**, then within the desired plan click on **Additional Information** and then **Notes**. Clicking on the Add Note link will allow the user to enter a new note. Once it is saved, it will be read-only. All users in the portal and the TCC/Facilitator will be able to see the notes.

Portal User: Portal/My Contacts



Portal users can see a list of the member's contacts in alphabetical order. The member clicks on **My Contacts** from within the portal. The user can click on **View Access** to see the details of the contact's portal access – whether they can see the member's meetings, contacts and notes.

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