

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



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# Idaho OSSM Links

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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

# Browser Requirements

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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

# OSSM Roles

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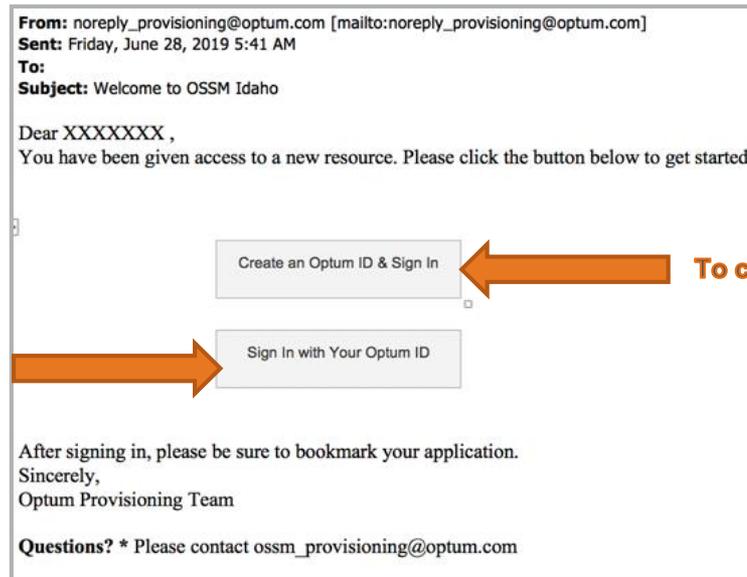
- OSSM is used only by Optum and the TCC/Facilitator. The TCC/Facilitator will utilize OSSM to submit the PCSP (person-centered service plan).
- Members/families, other support team members, and treatment providers use the “Portal” which you will grant them access to via OSSM (once the ROI/PCSP OSSM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

# OSSM User

TARGETED CARE  
COORDINATOR/FACILITATOR

# 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.

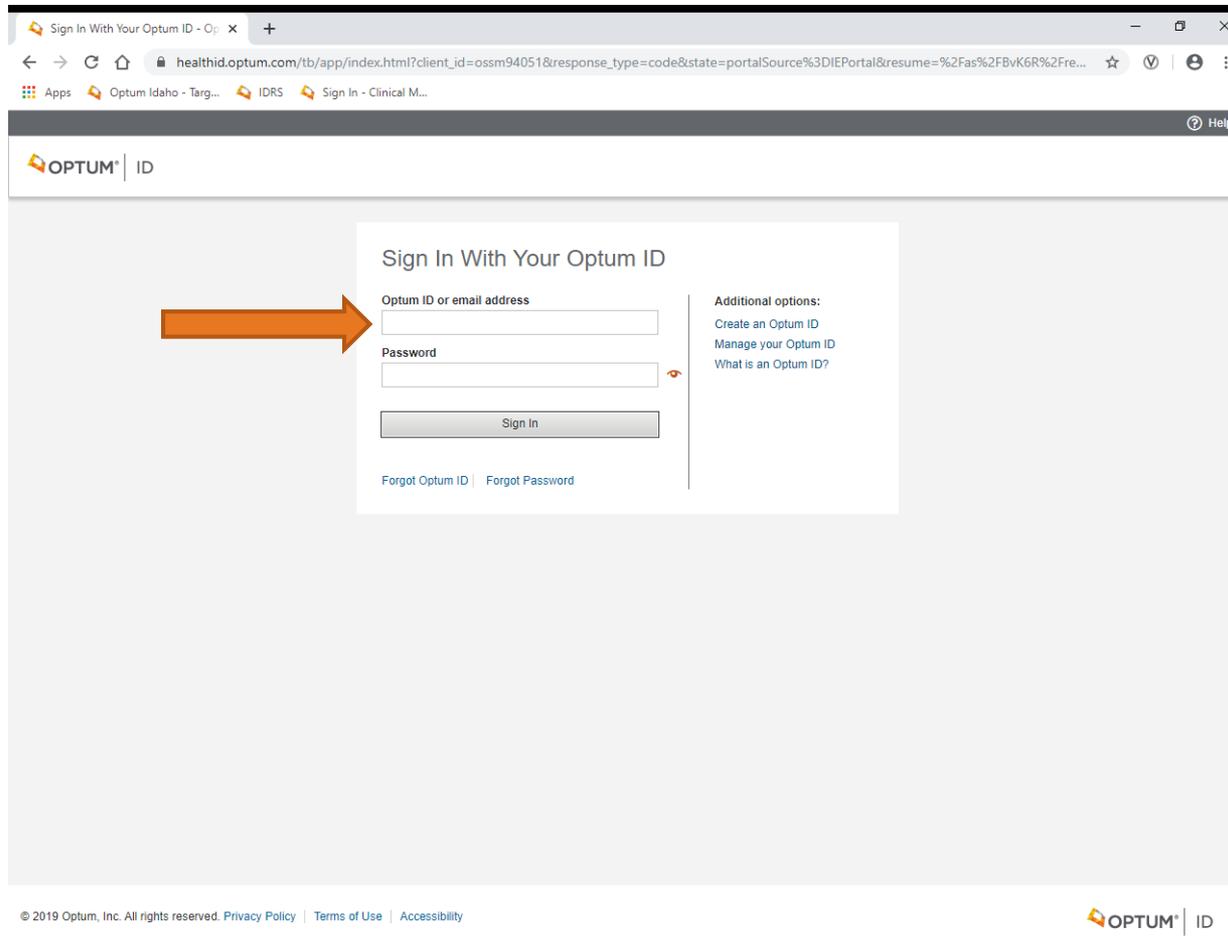


To log in with an existing Optum ID

To create a new Optum ID

- 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.

# OSSM Login Page



The screenshot shows a web browser window with the URL `healthid.optum.com/tb/app/index.html?client_id=ossm94051&response_type=code&state=portalSource%3DIEPortal&resume=%2Fas%2FBvK6R%2Fre...`. The page title is "Sign In With Your Optum ID". The form contains the following elements:

- Header: OPTUM® | ID
- Section Title: Sign In With Your Optum ID
- Input Field: Optum ID or email address (with an orange arrow pointing to it)
- Input Field: Password (with an eye icon for visibility toggle)
- Button: Sign In
- Additional options:
  - [Create an Optum ID](#)
  - [Manage your Optum ID](#)
  - [What is an Optum ID?](#)
- Footer: © 2019 Optum, Inc. All rights reserved. [Privacy Policy](#) | [Terms of Use](#) | [Accessibility](#)

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

# Facilitator Dashboard

The dashboard features a blue header with the user name 'Welcome, Karolin (Facilitator)' and a 'Sign Out' link. Below the header, the 'OPTUM' logo and 'Supports and Services Manager' are on the left, while 'Home' and 'Roster' are on the right. The main content area is divided into several widgets:

- Additional Information:** A text box with the heading 'Need Help or Have Questions?' and a link to an 'FAQ Document'.
- Search All Members (C360):** A search form with fields for 'First Name', 'Last Name', 'Medicaid ID', and 'Date of Birth', along with 'Search' and 'Clear' buttons.
- Review Decision:** A bar chart for the period 'June 6th - 12th, 2019' showing 0 'Met' and 1 'Not Met'.
- Support Team Access Expiring:** A bar chart showing 0 expirations for June, July, August, and September.
- Plans Ending:** A bar chart showing 0 plans ending for June, July, August, and September.
- Appointments:** A section for 'Wednesday June 12, 2019' stating 'No appointments scheduled for today.'

At the bottom of the dashboard, there is a copyright notice: '© 2019 Optum, Inc. All rights reserved. | Optum Clinical Manager (OCM) Std. Edition | Staging Environment Version 1.0.1.b5aaff7.939 (06-12-2019)'.

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

# Member Search

The screenshot displays the Optum Supports and Services Manager dashboard. At the top, a blue navigation bar contains the user's name 'Welcome, Karolin (Facilitator)' and a 'Sign Out' link. Below this, the 'OPTUM' logo and 'Supports and Services Manager' are on the left, while 'Home' and 'Roster' are on the right. The main content area features several widgets: 'Additional Information' with a 'Need Help or Have Questions?' section and a 'FAQ Document' link; 'Search All Members (C360)' with input fields for First Name, Last Name, Medicaid ID, and Date of Birth, and 'Search' and 'Clear' buttons; 'Review Decision' showing a bar chart for 'June 6th - 12th, 2019' with 0 'Met' and 1 'Not Met'; 'Support Team Access Expiring' with a monthly bar chart showing 0 for Jun, Jul, Aug, and Sep; 'Plans Ending' with a similar monthly bar chart showing 0 for Jun, Jul, Aug, and Sep; and 'Appointments' for 'Wednesday June 12, 2019' showing 'No appointments scheduled for today.' At the bottom, a copyright notice reads: '© 2019 Optum, Inc. All rights reserved. | Optum Clinical Manager (OCM) Std. Edition | Staging Environment Version 1.0.1.b5aaff7.939 (06-12-2019)'. An orange arrow points from the 'Additional Information' widget to the 'Search All Members (C360)' widget.

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

Welcome, Karolin (Facilitator) Sign Out

OPTUM® | Supports and Services Manager Home Roster

Home > Search All Members (C360)

**Search All Members (C360)**

First Name \*  
Annie

Last Name \*  
Kitchen

Medicaid ID \*  
1234567889

Date of Birth \*  
01-05-2001

Show 50 Per Page First Previous Next Last

Actions	First Name	Last Name	ID	ID Type	Date of Birth
	Annie	Kitchen	1234567889	MedicaidID	01/05/2005

**Add Member to Roster?**

Do you want to make yourself the primary roster owner for this individual?

Submit Cancel

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

**OPTUM** | Supports and Services Manager Welcome, Karolin (Facilitator) Sign Out

**Lopez, Mark** DOB 02-22-2012 **Medicaid ID** 987987987  
Age 7 years **Gender** Male

**Individual Details** Home Lopez, Mark

Contacts  
Notes  
Documents  
Plans

## Individual Records

Individual Information | Individual Identifier | Customer

### Individual Information

<b>Name</b>	Lopez, Mark	<b>Individual ID Type</b>	Medicaid ID
<b>Preferred Name</b>		<b>ID</b>	987987987
<b>Gender</b>	Male	<b>Date of Birth</b>	02-22-2012

### Address & Preferences

Address | Phone | Email | Languages + Add Address

Actions	Address	Type	New Fiscal County Name	Updated	Active
	640 Willow Way, Ammon, ID, Bonneville, 83400	Alt Primary Address	Bonneville		

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 screenshot displays the 'Member Details' interface. At the top, a navigation bar shows 'Welcome, Karolin (Facilitator)' and 'Sign Out'. Below this, a sidebar on the left contains 'Individual Details' and 'Core Individual Records'. The main content area is titled 'Core Individual Records' and shows 'Customer' information for 'Lopez, Mark'. A table lists customer records with columns for 'Customer', 'Start Date', 'End Date', and 'Active'. Below the table is the 'Contact & Preferences' section, with the 'Email' tab selected. This section contains a table of email records with columns for 'Email', 'Email Type', 'Preferred', 'Effective Date', 'End Date', and 'Updated'. An orange arrow points to a pencil icon in the top left corner. Another orange arrow points to the 'Email' tab. A third orange arrow points to the 'Email' input field. Two orange arrows point to the 'Effective Date' and 'End Date' fields. A final orange arrow points to the 'Save' button.

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

## Additional Information

### Need Help or Have Questions?

Optum will respond to complete Person-Centered Service Plans within 5 business days. Please see the FAQs below for additional information. If you have a question not addressed in the FAQs, please contact your Regional Network Manager.

## Search All Members (C360)

First Name \*

Last Name \*

Medicaid ID \*

## Review Decision

June 11th - 17th, 2019



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.

# Roster List View

First Name

Last Name

Individual ID

Date of Birth

Stability

Risk Tier

Home > Roster

## Roster

Individuals Notes

Total Records: 8 Show  Per Page   1

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

**Lopez, Mark** DOB 02-22-2002 Medicaid ID 987987987 Age 17 years Gender Male

Home > Lopez, Mark

### Core Individual Records

Individual Information | Individual Identifier | Customer

#### Individual Information

Name	Lopez, Mark	Individual ID Type	Medicaid ID
Preferred Name		ID	987987987
Gender	Male	Date of Birth	02-22-2002

### Contact & Preferences

Address | Phone | Email | Languages

#### Address

+ Add Address

Actions	Address	Type	New Fiscal County Name	Updated	Active
	840 Willow Way, Ammon, ID, Bonneville, 83400	Alt Primary Address	Bonneville		<input checked="" type="checkbox"/>

### Individual Eligibility

Funding Eligibility

#### Funding Eligibility

+ Add Eligibility

Show 10 Per Page First Previous 1 Next Last

Actions	Eligibility Type	Status	Status Date	Customer	Start Date	End Date	Created
No records to display.							

### Roster Information

Individual Roster | Roster History

#### Individual Roster

+ New Roster Item

Total Records: 4 Show 10 Per Page First Previous 1 Next Last

Actions	User	Role	Work Queue	Risk Tier	Stability	Primary	Updated	Active
	Karolin Ritter	FACILITATOR				<input checked="" type="checkbox"/>	06-17-2019	<input checked="" type="checkbox"/>
	Josemaria Orozoo	FACILITATOR					06-13-2019	<input checked="" type="checkbox"/>
	Melissa Fernandes	FACILITATOR					06-07-2019	<input checked="" type="checkbox"/>
	Vitoria Martins	ADMIN_REVIEWER					06-07-2019	<input checked="" type="checkbox"/>

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.

# Roster View from Within Member Record

## Roster Information

[Individual Roster](#) [Roster History](#)

### Individual Roster

[+ New Roster Item](#)

Total Records: 2 Show  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.

# Roster Maintenance

**Roster Information**

Individual Roster | Roster History

**Individual Roster**

Total Records: 4 Show 10 Per Page First Previous 1 Next Last

**+ New Roster Item**

Actions	User	Role	Work Queue	Risk Tier	Stability	Primary	Updated	Active
<input checked="" type="radio"/> User ID: <input type="text" value="ADTST12620"/> <input type="button" value="Q"/> <input type="radio"/> Work Queue: <input type="text" value="Work Queue Name"/>						<input type="checkbox"/> Primary		
				<input type="text" value="06-03-2019"/> <input type="button" value="C"/>			<input type="text" value="mm-dd-yyyy"/> <input type="button" value="C"/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	Updated 06-12-2019, 09:03:39 PM, by SYSTEM							
<input type="button" value="Pencil"/>	Josemaria Orozoo	FACILITATOR				<input checked="" type="checkbox"/>	06-04-2019	<input checked="" type="checkbox"/>
<input type="button" value="Pencil"/>	Melissa Fernandes	FACILITATOR				<input type="checkbox"/>	06-07-2019	<input checked="" type="checkbox"/>
<input type="button" value="Pencil"/>	Vitoria Martins	ADMIN_REVIEWER				<input type="checkbox"/>	06-07-2019	<input checked="" type="checkbox"/>

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

# Member Contacts List

**OPTUM** | Supports and Services Manager

Welcome, Karolin (Facilitator) Sign Out

Home Roster

**Lopez, Mark**

DOB 02-22-2012 Medicaid ID 987987987  
Age 7 years Gender Male

Individual Details  
**Contacts**  
Notes  
Documents  
Plans

Home > Lopez, Mark > Contacts

### Contacts

+ Add Contact

Status: Active Contact Type: All Total Records: 1 Show 10 Per Page First Previous 1 Next Last

Name	Contact Type, Relationship	Support Team	Portal Access	Organization	Phone/Email	Active
Adams, Manny	Personal, Parent	✓	✓		111-222-2342 mannyadams@gmail.com	✓

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.

# Add New Contact

Home > Lopez, Mark > Contacts

## Contacts

+ Add Contact

Status: Active | Contact Type: All | Total Records: 4 | Show: 10 | Per Page: First | Previous: 1

Name	Contact Type, Relationship	Support Team	Portal Access	Organization	Phone/Email	
Adams, Manny	Personal, Parent	✓	✓		111-222-2342 mannyadams@gmail.com	✓

### Add Contact

Contact Information | Phone / Address | Attachments | Notes

#### Contact Information

Contact Type: Personal

Do Not Contact

Lives with Individual

Primary Emergency Contact

Primary Responsible Person

Evacuation Responsible

Effective Date: mm-dd-yyyy

End Date: mm-dd-yyyy

Release of Information (ROI) on File  Ensure an active ROI is on file before granting portal access

Support Team Member

Portal Access  Manage Access

ROI Effective Date: mm-dd-yyyy

ROI End Date: mm-dd-yyyy

Add Cancel

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

**Lopez, Mark** DOB 02-22-2002 Medicaid ID 987987987  
Age 17 years Gender

Home > Lopez, Mark > Contacts > Add Contact

**Add Contact**

Contact Information | Phone / Address | Attachments | Notes

**Contact Information**

Contact Type: Personal

First Name \*

Last Name \*

Date of Birth

Email

Relationship

Preferred Contact Method

Do Not Contact

Lives with Individual

Primary Emergency Contact

Primary Responsible Person

Evacuation Responsible

Effective Date \*

End Date

Release of Information (ROI) on File  Ensure an active ROI is on file before granting portal access

ROI Effective Date

ROI End Date

Support Team Member

Portal Access  Manage Access

**Add** [Cancel](#)

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

Contact Information | Phone / Address | Attachments | Notes

### Contact Information

Contact Type	Personal	Do Not Contact	<input type="checkbox"/>
First Name *	<input type="text" value="Cherry"/>	Lives with Individual	<input checked="" type="checkbox"/>
Last Name *	<input type="text" value="Popcorn"/>	Primary Emergency Contact	<input checked="" type="checkbox"/>
Date of Birth	<input type="text" value="01-02-1987"/>	Primary Responsible Person	<input type="checkbox"/>
Email	<input type="text" value="cherry popcorn@gmail.com"/>	Evacuation Responsible	<input type="checkbox"/>
Relationship	<input type="text" value="Parent"/>	Effective Date *	<input type="text" value="06-13-2019"/>
Preferred Contact Method	<input type="text" value="Email"/>	End Date	<input type="text" value="mm-dd-yyyy"/>

---

Release of Information (ROI) on File	<input checked="" type="checkbox"/> Ensure an active ROI is on file before granting portal access	Support Team Member	<input checked="" type="checkbox"/>
ROI Effective Date *	<input type="text" value="06-17-2019"/>	Portal Access	<input checked="" type="checkbox"/> <a href="#">Manage Access</a>
ROI End Date *	<input type="text" value="06-16-2020"/>		

Updated 06-17-2019, 08:35:22 AM, by ADTST12620 [View History](#)

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.

# Member Contact ROI/PCSP OSSM Consent for Portal Access

Contact Information

Phone / Address

Attachments

Notes

## Contact Information

Contact Type Personal

First Name \* Manny

Last Name \* Adams

Date of Birth 02-01-1980

Email mannyadams@gmail.com

## Edit Contact

Contact Information

Phone / Address

Attachments

Notes

### Phone

+ Add Phone

Show 10 Per Page First Previous 1 Next Last

Actions	Phone	Extension	Type	Preferred	Active
No records to display.					

## Edit Contact

Contact Information

Phone / Address

Attachments

Notes

### Phone

+ Add Phone

Show 10 Per Page First Previous 1 Next Last

Actions	Phone	Extension	Type	Preferred	Active
No records to display.					

+ Add Address

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

Type	Active
Primary	✓

### Address

+ Add Address

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

Actions	Address	Type	Active
	<p>Address Type * <input type="text"/></p> <p>City / Town * <input type="text"/></p> <p>Country * UNITED STATES</p> <p>Address Line 1 * <input type="text"/></p> <p>County <input type="text"/></p> <p>Zip Code * <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>State * <input type="text"/></p> <p>Effective Date mm-dd-yyyy</p> <p>End Date mm-dd-yyyy</p>		

421 East Ave, Boise, ID, 55678 Primary ✓

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.

# Member Contact ROI/PCSP OSSM Consent for Portal Access

Release of Information (ROI) on File  Ensure an active ROI is on file before granting portal access

Support Team Member

ROI Effective Date \* 06-03-2019

Portal Access  [Manage Access](#)

ROI End Date \* 06-02-2020

Save Cancel

Updated 06-03-2019, 06:05:06 AM, by ADTST12620 [View History](#)

Support Team Access Expiring

Month	Count
Jun	0
Jul	0
Aug	1
Sep	0

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

Release of Information (ROI) on File  Ensure an active ROI is on file before granting portal access

Support Team Member

ROI Effective Date \* 06-03-2019

ROI End Date \* 06-02-2020

Portal Access  Manage Access

Updated 06-03-2019, 06:05:06 AM, by ADTST12

Save Cancel

### Member Portal Access Criteria

To grant portal access please ensure the contact has all the following details and criteria:

- An Active Primary Phone Number ✕
- An Email Address ☑
- Is a Support Team Member ☑
- Active Release of Information (ROI) ☑

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).

# Member Contact Portal Access Controls

Contact Information | Phone / Address | Attachments | Notes

### Contact Information

Contact Type: Personal  Do Not Contact

First Name: \* Cherry  Lives with Individual

Last Name: \* Popcorn  Primary Emergency Contact

Date of Birth: 01-02-1987  Primary Responsible Person

Email: cherrypopcorn@gmail.com  Evacuation Responsible

Relationship: Parent  Effective Date: \* 06-13-2019

Preferred Contact Method: Email  End Date: mm-dd-yyyy

---

Release of Information (ROI) on File  Ensure an active ROI is on file before granting portal access

ROI Effective Date: \* 06-17-2019

ROI End Date: \* 06-16-2020

Support Team Member  [Manage Access](#)

Updated 06-17-2019, 08:35:22 AM, by ADTST12620

### Member Portal Access Granted

Portal access has been granted!  
Portal access will be revoked if any criteria are removed.

The portal access is associated with the active Primary Address:  
Idaho 55678

### Member Portal: Plan Section Access

- Appointments
  - Add and View Appointments
  - View Appointments
- Contacts
- Documents
- Meetings
- Notes

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.

# Member Plans List

The screenshot displays the OPTUM Supports and Services Manager interface. At the top right, a user is logged in as 'Welcome, Karolin (Facilitator)' with a 'Sign Out' link. The main header shows 'OPTUM® | Supports and Services Manager' and navigation links for 'Home' and 'Roster'. The member's name 'Lopez, Mark' is prominently displayed, along with their 'DOB 02-22-2012', 'Age 7 years', 'Medicaid ID 987987987', and 'Gender'. A sidebar on the left contains navigation options: 'Individual Details', 'Contacts', 'Notes', 'Documents', and 'Plans', with 'Plans' selected and highlighted by an orange arrow. The main content area is titled 'Plans' and shows a breadcrumb trail 'Home > Lopez, Mark > Plans'. Below this, there is a table with one record. The table has columns for 'Actions', 'Plan ID', 'Plan Type', 'Status', 'Reason', and 'Start Date'. The record shows a pencil icon in the 'Actions' column, 'P0249' in 'Plan ID', 'Initial' in 'Plan Type', 'Active' in 'Status', 'New' in 'Reason', and '05-30-2019' in 'Start Date'. An orange arrow points to the pencil icon. Above the table, there is a '+ Add Plan' link with an orange arrow pointing to it. The table also includes pagination controls: 'Total Records: 1', 'Show 10', 'Per Page', and navigation arrows for 'First', 'Previous', 'Next', and 'Last'.

**Lopez, Mark** DOB 02-22-2012 Medicaid ID 987987987  
Age 7 years Gender

Home > Lopez, Mark > Plans

### Plans

Total Records: 1 Show  Per Page ◀ First ◀ Previous 1 Next ▶ Last ▶ [+ Add Plan](#)

Actions	Plan ID	Plan Type	Status	Reason	Start Date
	P0249	Initial	Active	New	05-30-2019

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

**Lopez, Mark**
DOB 02-22-2012  
Age 7 years
Medicaid ID 987987987  
Gender

- Plans
- Plan Details**
- Meetings
- Assessments

Home > Lopez, Mark > Plans > Plan

## Person Centered Plan

**Plan Review**

Submit for Review
 Under Review
 Submit for Clinical Review
 Submit Decision

Plan Details
Attachments

### Plan Details

Customer	Idaho	Person responsible for monitoring plan	Orozco, Josemaria
Plan ID	P0249	Admin Reviewer	Kennedy, Zachary
Plan Type	Initial	Clinical Reviewer	Tsao, Dai
Reason for Plan	New	Review Status	Met
Start Date	05-30-2019	Current Plan Status	Active
Next Review Date	05-29-2020	Plan Status Dates	Active 06-03-2019, 06:46:40 AM
Date of Last Revised Plan			Under Review 06-03-2019, 06:26:45 AM
			Ready for Review 06-03-2019, 06:18:54 AM
			New 05-30-2019, 04:43:50 PM

Available on Portals  Yes  No

Services

<input type="checkbox"/> Behav Mod/Consult	<input checked="" type="checkbox"/> BH	<input type="checkbox"/> Case Mgmt
<input type="checkbox"/> Day Treatment	<input type="checkbox"/> Fam Psychoed	<input type="checkbox"/> Fam Supp
<input type="checkbox"/> FSS	<input type="checkbox"/> Inten Home & Comm Svcs	<input type="checkbox"/> IOP
<input type="checkbox"/> IOP: MH	<input type="checkbox"/> IOP: SUD/Dual Dx	<input type="checkbox"/> Med Mgt
<input type="checkbox"/> NeuroPsych Testing	<input type="checkbox"/> OP SUD Tx	<input checked="" type="checkbox"/> Outpatient
<input type="checkbox"/> Psychother (ext OP)	<input type="checkbox"/> Psychother (fam)	<input type="checkbox"/> Psychother (group)
<input type="checkbox"/> Psychother (indiv)	<input checked="" type="checkbox"/> Respite	<input checked="" type="checkbox"/> Skills Build/ CBRS
<input type="checkbox"/> Ther Aft-School & Summ Prog	<input type="checkbox"/> Youth Supp	<input type="checkbox"/> Other

Save
Cancel

Updated 06-03-2019, 06:46:40 AM, by ADTST12844 [View History](#)

Notes [+ Add Note](#)

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.

# Member Plan PDF Attachment

The screenshot displays the Optum member plan interface for Mark Lopez. At the top, the member's name 'Lopez, Mark' is shown on the left, and personal information including DOB (02-22-2012), Age (7 years), Medicaid ID (987987987), and Gender is on the right. A navigation breadcrumb trail reads 'Home > Lopez, Mark > Plans > Plan'. The main heading is 'Person Centered Plan'. Below this, a 'Plan Review' section contains four status buttons: 'Submit for Review', 'Under Review', 'Submit for Clinical Review', and 'Submit Decision', each with a checkmark icon. The 'Attachments' tab is selected, indicated by an orange arrow pointing to it. The 'Attachments' section features a '+ Add Attachment' button, also highlighted with an orange arrow. Below the button is a table with columns for 'Actions', 'Name', 'Type', 'Date of Document', 'Created', and 'Created By'. The table currently shows 'No records to display.' and includes pagination controls for 'Show 10 Per Page' and navigation buttons for 'First', 'Previous 1', 'Next', and 'Last'.

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.

# Member Plan Add PDF Attachment

Services Manager

**Lopez, Mark**

Plans

- Plan Details
- Meetings
- Assessments

Home

Person

Plan F

Medicaid ID 987987987

Gender

Plan Type Annual Update Start Date 11-24-2020

Status New End Date 11-24-2021

Submit Decision

Upload File \* Select File Maximum file size: 10MB

File Am Ex Delta Flight to OR may.pdf (93.3KB) Remove File

Add Cancel

Per Page First Previous 1 Next Last

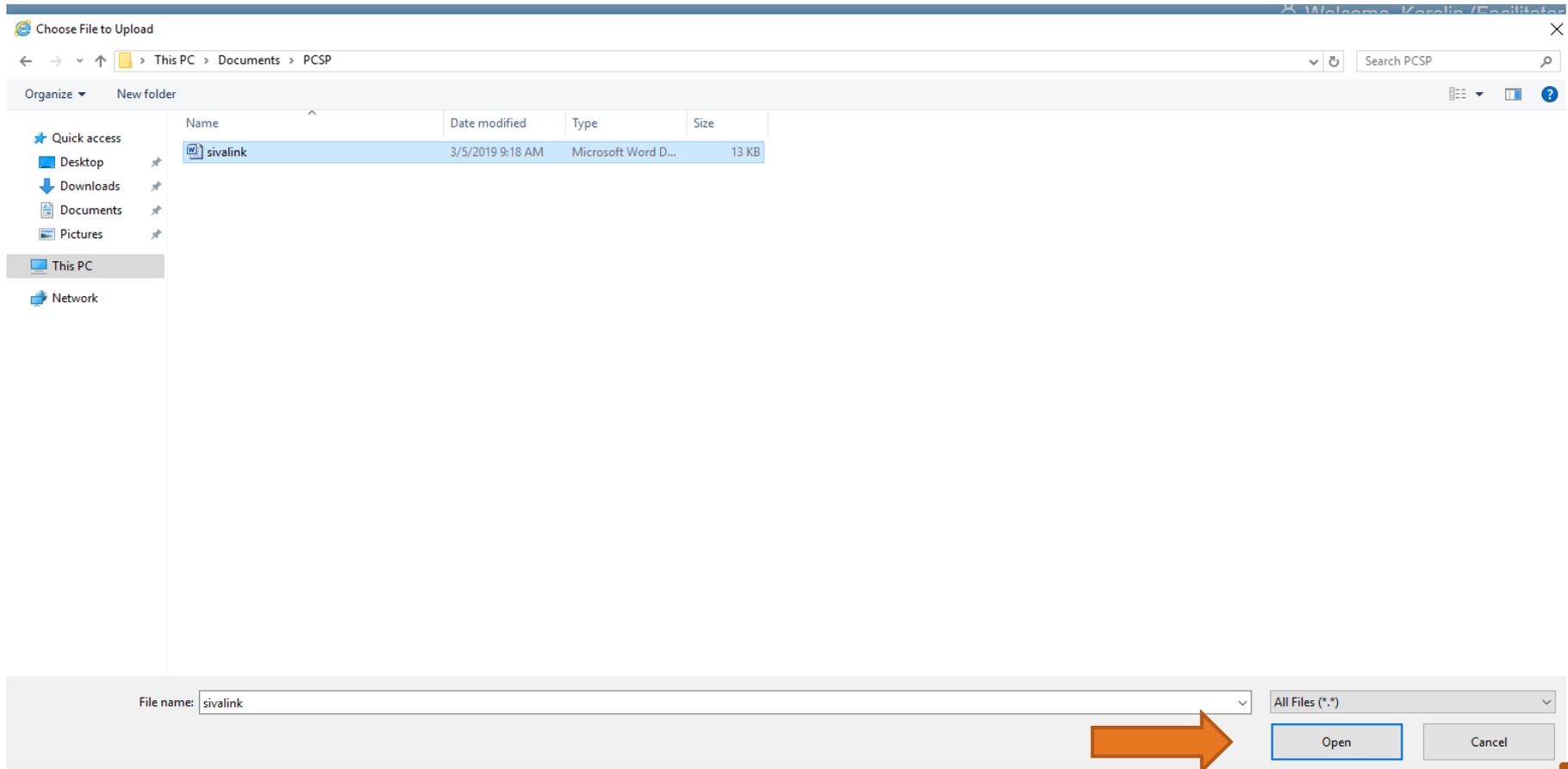
Created By

No records to display.

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.

# Member Plan Add PDF Attachment

The screenshot shows a web application interface for a 'Services Manager'. A modal window titled 'Add Attachment' is open, allowing a user to add a PDF attachment to a plan. The modal contains the following fields and options:

- Attachment Name \***: A text input field containing the text 'plan'.
- Description**: A text input field containing the text 'signed version'.
- Type**: A dropdown menu with 'Plan' selected.
- Date of Document \***: A date picker showing '06-12-2019'.
- Available On Portal**: A checked checkbox.
- Upload File \***: A section with a 'Select File' button and the text 'Maximum file size: 10MB'. Below this, a file named 'Am Ex Delta Flight to OR may.pdf (93.3KB)' is listed with a 'Remove File' link.
- Buttons**: 'Add' and 'Cancel' buttons are located at the bottom left of the modal.

An orange arrow points to the 'Add' button. The background shows a plan for 'Lopez, Mark' with details like 'Medicaid ID 987987987', 'Status New', and 'End Date 11-24-2021'. A 'Submit Decision' button is also visible in the background.

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.

# Member Plan PDF Attachment

The screenshot displays the 'Person Centered Plan' interface for Lopez, Mark. The top navigation bar includes the member's name, DOB (02-22-2012), Age (7 years), Medicaid ID (987987987), and Gender. The plan details show 'Plan Type: Annual Update', 'Status: New', 'Start Date: 11-24-2020', and 'End Date: 11-24-2021'. The 'Plan Review' section has four steps: 'Submit for Review', 'Under Review', 'Submit for Clinical Review', and 'Submit Decision', all marked with checkmarks. The 'Attachments' section is highlighted with an orange arrow, showing a table with one attachment named 'plan' of type 'Plan', dated '06-12-2019'. An orange arrow points from the 'Add Attachment' button to the 'Edit Attachment' modal. The modal contains fields for 'Attachment Name' (A.H. Plan), 'Description', 'Type' (Plan), 'Date of Document' (05-30-2019), and 'Available On Portal' (checkbox). It also shows the file 'Person-Centered Service Plan Form.pdf (2.2MB)' and a 'Delete Attachment' button. The modal is updated on '05-30-2019, 01:02:36 PM, by ADTST12626'.

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

< Plans

**Plan Details**

Meetings

Assessments

**Services**

<input type="checkbox"/> Behav Mod/Consult	<input checked="" type="checkbox"/> BH	<input type="checkbox"/> Case Mgmt
<input type="checkbox"/> Day Treatment	<input type="checkbox"/> Fam Psychoed	<input type="checkbox"/> Fam Supp
<input type="checkbox"/> FSS	<input type="checkbox"/> Inten Home & Comm Svcs	<input type="checkbox"/> IOP
<input type="checkbox"/> IOP: MH	<input type="checkbox"/> IOP: SUD/Dual Dx	<input type="checkbox"/> Med Mgt
<input type="checkbox"/> Neuro/Psych Testing	<input type="checkbox"/> OP SUD Tx	<input checked="" type="checkbox"/> Outpatient
<input type="checkbox"/> Psychother (ext OP)	<input type="checkbox"/> Psychother (fam)	<input type="checkbox"/> Psychother (group)
<input type="checkbox"/> Psychother (indiv)	<input checked="" type="checkbox"/> Respite	<input checked="" type="checkbox"/> Skills Build/ CBRS
<input type="checkbox"/> Ther Aft-School & Summ Prog	<input type="checkbox"/> Youth Supp	<input type="checkbox"/> Other

Updated 06-03-2019, 06:46:40 AM, by ADTST12644 [View History](#)

**Notes** [+ Add Note](#)

Total Records: 1 Show  Per Page [◀ First](#) [◀ Previous](#) 1 [Next ▶](#) [Last ▶](#)

Created By	Role, Relationship	Created	Display On Portal
ADTST12620	FACILITATOR	06-17-2019, 09:22:22 AM	✓

**Think about this**

Please think about the PCSP and tell me what it is you are thinking.

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.

# Member Plan Notes

**Add Note** [X]

**Note Type** Plan [v]

**Subject Type** Plan [v]

**Display On Portal**

**Title \*** Think about this

**Note Details \*** Please think about the PCSP and tell me what it is you are thinking.

3932 characters remaining

**Add** **Clear** **Cancel**

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.

# Member Notes



OPTUM® | Supports and Services Manager

Welcome, Tonya Sign Out

Home Individual Roster

**Lopez, Mark** DOB 07-12-1995 Medical ID 756756753  
Age 23 years Gender Male

Individual Details Home > Lopez, Mark > Notes

Contacts

Notes

Notes

+ Add Note

Created By Note Type Subject Type Keyword Filter

Created From Created To

mm-dd-yyyy mm-dd-yyyy

Total Records: 21 Show 10 Per Page First Previous 1 | 2 | 3 Next Last

Created By	Created	Note Type	Subject Type
Akram, Hamza	01-04-2019	Support Plan	Support Plan
The support plan details are attached in the attachment section.			
Akram, Hamza	01-04-2019	Support Plan	Support Plan
The support plan details are attached in the attachment section.			
Akram, Hamza	01-04-2019	Support Plan	Support Plan
The support plan details are attached in the attachment section.			
Akram, Hamza	12-21-2018	Support Plan	Support Plan
This is new individual for the support plan.			
Akram, Hamza	12-21-2018	Support Plan	Support Plan

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.

# Meetings

### Plans

[+ Add Plan](#)

Total Records: 16 Show  Per Page [◀ First](#) [◀ Previous 1](#) | [2](#) [Next ▶](#) [Last ▶](#)

Actions	Plan ID	Plan Type	Status	Reason	Start Date
	P1627	Annual Update	New	New	11-01-2019
	P1603	Annual Update	New	Other	10-31-2019

### Lopez, Mark

DOB 02-22-2012    Medicaid ID 987987987  
Age 7 years    Gender

Home > Lopez, Mark > Plans > Plan > Meetings

Plan Type Initial    Start Date 05-30-2019  
Status Active    End Date 05-29-2020

### Meetings

[+ Add Meeting](#)

Total Records: 1 Show  Per Page [◀ First](#) [◀ Previous 1](#) [Next ▶](#) [Last ▶](#)

Actions	Type	Reason	Attendees	Status	Date	Start Time	Location
	Annual	New Plan	3	Scheduled	06-01-2019	3:15 PM	Carman Building, Room 3

#### Appointments

Thursday June 20, 2019

- 3:00 PM - Plan Meeting Lopez, Mark

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.

# Add New Meeting

**Lopez, Mark** DOB 02-22-2002 Age 17 years Medicaid ID 987987987 Gender

Home > Lopez, Mark > Plans > Plan > Create Meeting

Plan Type Initial Status Active Start Date 05-30-2019 End Date 05-29-2020

## Add Meeting

Meeting Attendees

**Meeting**

Meeting Type \*  Meeting Date \*

Status \*  Start Time \*    AM  PM

Reason \*  Time Zone \*  Duration \*

Location  200 characters remaining

Address  200 characters remaining

Individual requested the meeting \*  Yes  No

Individual chose meeting location  Yes  No, please explain  N/A, please explain

Please explain

Individual chose meeting date/time  Yes  No, please explain  N/A, please explain

Please explain

**Add** [Cancel](#)

**Meeting**

Meeting Type \*

 Status \*

Reason \*

- Cancelled
- Completed
- New
- Scheduled

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 not allow for the option to add additional attendees.

# Meeting Attendees

Meetings

[+ Add Meeting](#)

Total Records: 5 Show  Per Page [◀ First](#) [◀ Previous](#) 1 [Next](#) [▶ Last ▶](#)

Actions	Type	Reason	Attendees	Status	Date	Start Time	Location
	Emergency	New Plan	2	Scheduled	11-07-2019	2:30 PM	asdf
	Emergency	New Individual	4	Scheduled	11-05-2019	6 PM	asdf

**Lopez, Mark** DOB 02-22-2012 Age 7 years [Phone](#) [Location](#)

Medical ID 867987987 Plan Type Initial Start Date 05-30-2019  
Status Active End Date 05-29-2020

[Home](#) > [Lopez, Mark](#) > [Meetings](#) > Meeting

### View Meeting

Meeting Attendees

[+ Add Attendees](#) [✓ Check Attendance](#) [Present Plan](#)

Actions	Name	Contact Type, Relationship	Organization, Role	Phone	Will Attend	Attended	Signed
	Lopez, Mark	Self					
	Ritter, Karolin	Support Navigator					
	Adams, Manny	Personal, PART		111-222-2342			

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

Home > Lopez, Mark > ... > Meetings > Meeting

Plan Type Initial Start Date 05-30-2019  
Status Active End Date 05-29-2020

## View Meeting

Meeting Attendees

**Attendees**

+ Add Attendees ✓ Check Attendance Present Plan

Actions	Name ^	Contact Type, Relationship	Organization, Role	Phone	Will	Signed
	Lopez, Mark	Self				
	Ritter, Karolin	Support Navigator				
	Adams, Manny	Personal, PART		111-222-2342		



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

# Select Meeting Attendees From Contacts

Home > Lopez, Mark > ... > Meetings > Meeting

Plan Type Initial Start Date 05-30-2019  
Status Active End Date 05-29-2020

## View Meeting

### Add Contacts

<input type="checkbox"/>	Name ^	Contact Type, Relationship	Support Team	Organization, Role	Phone
<input checked="" type="checkbox"/>	Adams, Manny	Personal, Parent	✓		
<input checked="" type="checkbox"/>	Popcorn, Cherry	Personal, Parent	✓		

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.

# Adding a Meeting Attendee

Home > Lopez, Mark > ... > Meetings > Meeting

Plan Type Initial Start Date 05-30-2019  
Status Active End Date 05-29-2020

## View Meeting

Meeting Attendees

**Attendees** + Add Attendees ✓ Check Attendance Present Plan

Actions	Name ^	Contact Type, Relationship	Organization, Role	Phone	Will	Signed
	Lopez, Mark	Self				
	Ritter, Karolin	Support Navigator				
	Adams, Manny	Personal, PART		111-222-2342		

An orange arrow points from the 'Phone' column header to the 'Will' column header. A dropdown menu is open over the 'Will' column, showing 'From Contacts' and 'From Previous Meeting' options.

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

# Select Meeting Attendees From Previous Meeting

DOB 02-22-2002 Medicaid ID 987987987  
Age 17 years Gender

**Select Meeting** [X]

	Type	Reason	Attendees	Date	Time	Location
<input type="radio"/>	Annual	New Plan	4	06-01-2019	3:15 PM	Carman Building, Room 3

Next Cancel

Initial Start Date 05-30-2019  
Active End Date 05-29-2020

Check Attendance Present Plan

Signed

Lopez, Mark Self  
Ritter, Karolin Support Navigator

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

DOB 02-22-2002    Medicaid ID 98798  
Age 17 years    Gender

## Add Attendees

<input type="checkbox"/>	Name ▲	Role	Support Team	Organization	Phone
<input checked="" type="checkbox"/>	Lopez, Mark	Self			
<input checked="" type="checkbox"/>	Ritter, Karolin	Support Navigator			
<input type="checkbox"/>	Adams, Manny	Personal, PART	✓		111-222-2342
<input type="checkbox"/>	Popcorn, Cherry	Personal, PART	✓		

[Cancel](#)

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.

# Submitting the Plan for Review

**Lopez, Mark** DOB 02-22-2012 Medicaid ID 987987687  
Age 7 years Gender

Home > Lopez, Mark > Plans > Plan

### Person Centered Plan

#### Plan Review

Submit for Review  Under Review  Submit for Clinical Review  Submit Decision

Plan Details Attachments

#### Plan Details

Customer Idaho  
Plan ID P0423  
Plan Type \* Annual Update  
Reason for Plan \* New  
Start Date \* 11-24-2020  
Next Review Date \* 11-24-2021  
Date of Last Revised Plan 06-12-2019  
Person responsible for monitoring plan Orozoo, Josemaria  
Admin Reviewer  
Clinical Reviewer  
Review Status  
Current Plan Status New  
Plan Status Dates New 06-12-2019, 09:15:44 PM

Available on Portals  Yes  No

Services \*  Behav Mod/Consult  BH  Case Mgmt  
 Day Treatment  Fam Psychoed  Fam Supp  
 FSS  Inten Home & Comm Svcs  IOP  
 IOP: MH  IOP: SUD/Dual Dx  Med Mgt  
 Neuro/Psych Testing  OP SUD Tx  Outpatient  
 Psychother (ext OP)  Psychother (fam)  Psychother (group)  
 Psychother (indiv)  Respite  Skills Build/ CBRS  
 Ther AR-School & Summ Prog  Youth Supp  Other

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 screenshot displays a web interface for managing a 'Person Centered Plan' for 'Lopez, Mark'. The user's profile information at the top right includes DOB (02-22-2012), Age (7 years), Medicaid ID (987987987), and Gender. The left sidebar shows navigation options: Plans, Plan Details (selected), Meetings, and Assessments. The main content area is titled 'Person Centered Plan' and features a 'Plan Review' section with a 'Submit for Review' button and a 'Submit Decision' button. A modal dialog box titled 'Submit Plan for Review' is centered on the screen, asking 'Are you sure you want to submit this plan for review?' with 'Submit' and 'Cancel' buttons. Below the dialog, the 'Plan Details' form is visible, containing fields for Plan Type (Annual Update), Reason for Plan (New), Start Date (11-24-2020), Next Review Date (11-24-2021), Date of Last Revised Plan (06-12-2019), and Person responsible for monitoring plan (Orozco, Josemaria). The form also includes sections for Admin Reviewer, Clinical Reviewer, Review Status, Current Plan Status (New), Plan Status Dates (New, 06-12-2019, 09:15:44 PM), Available on Portals (Yes selected), and a list of Services with checkboxes for Behav Mod/Consult, Day Treatment, FSS, BH, Fam Psychoed, Inten Home & Comm Svcs, Case Mgmt, Fam Supp, and IOP.

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

**Lopez, Mark** Success DOB 02-22-2012 Age 7 years Medicaid ID 987987987 Gender

Plans Home > Lopez, Mark > Plans > Plan

Plan Details  
Meetings  
Assessments

**Person Centered Plan**

**Plan Review**

Submit for Review  Under Review  Submit for Clinical Review  Submit Decision

**Plan Details** Attachments

**Plan Details**

Customer	Idaho	Person responsible for monitoring plan	Orozco, Josemaria
Plan ID	P0423	Admin Reviewer	
Plan Type	Annual Update	Clinical Reviewer	
Reason for Plan	New	Review Status	
Start Date	11-24-2020	Current Plan Status	Ready to Review
Next Review Date	11-24-2021	Plan Status Dates	Ready for Review 06-12-2019, 09:30:49 PM
Date of Last Revised Plan	06-12-2019	New	06-12-2019, 09:15:44 PM

Available on Portals  Yes  No

Services

<input checked="" type="checkbox"/> Behav Mod/Consult	<input type="checkbox"/> BH	<input type="checkbox"/> Case Mgmt
<input checked="" type="checkbox"/> Day Treatment	<input type="checkbox"/> Fam Psychoed	<input type="checkbox"/> Fam Supp
<input type="checkbox"/> FSS	<input checked="" type="checkbox"/> Inten Home & Comm Svcs	<input type="checkbox"/> IOP
<input checked="" type="checkbox"/> IOP: MH	<input type="checkbox"/> IOP: SUD/Dual Dx	<input type="checkbox"/> Med Mgt
<input type="checkbox"/> Neuro/Psych Testing	<input checked="" type="checkbox"/> OP SUD Tx	<input type="checkbox"/> Outpatient
<input type="checkbox"/> Psychother (ext OP)	<input checked="" type="checkbox"/> Psychother (fam)	<input type="checkbox"/> Psychother (group)
<input type="checkbox"/> Psychother (indiv)	<input checked="" type="checkbox"/> Respite	<input type="checkbox"/> Skills Build/ CBRS
<input type="checkbox"/> Ther Alt-School & Summ Prog	<input type="checkbox"/> Youth Supp	<input type="checkbox"/> Other

Save Cancel Updated 06-12-2019, 09:30:49 PM, by ADTST12620 [View History](#)

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.)

# Meeting Reminders Widget

The screenshot displays the OPTUM Supports and Services Manager dashboard. The top navigation bar includes 'Welcome, Tonya', 'Tools', 'Security', 'System Settings', and 'Sign Out'. The main navigation menu contains 'Home', 'Individual', 'Queues', 'Incidents', and 'Reports'. The dashboard features several widgets:

- News:** A 'Welcome' message and a section for 'OCM for IDD'.
- Support Plans Ending:** A bar chart showing 1 plan ending in January and 1 plan ending in March.
- Appointments:** A widget for 'Wednesday, January 16, 2019' listing two meetings: '9:00 AM - Support Plan Meeting' for Herman, Gerald Stephen and '1:00 PM - Support Plan Meeting' for Lopez, Mark. An orange arrow points to the clock icon in the top right of this widget.
- Program Enrollments:** A table listing enrollment counts for EDP (1), IDD (3), Pilot (2), and Special Pop (1).
- Desired Outcomes Ending:** A circular gauge showing 100% (2 Outstanding) and 0% (0 Resolved) for January.
- Work Queue:** A section for 'Tasks Due Soon' (0 tasks) and 'Overdue Tasks' (8 tasks).

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 screenshot shows the OPTUM Supports and Services Manager dashboard. At the top right, it says 'Welcome, Karolin (Facilitator) Sign Out'. Below that are 'Home' and 'Roster' links. The dashboard is divided into several widgets:

- Additional Information:** Contains a 'Need Help or Have Questions?' section with text about response times and a link to an 'FAQ Document'.
- Search All Members (C360):** A search form with fields for 'First Name', 'Last Name', 'Medicaid ID', and 'Date of Birth', along with 'Search' and 'Clear' buttons.
- Review Decision:** A bar chart for the week of June 7th - 13th, 2019. The chart shows 0 'Met' and 1 'Not Met'. An orange arrow points to this section.
- Support Team Access Expiring:** A calendar view showing 0 expirations for June, July, August, and September.
- Plans Ending:** A calendar view showing 0 plans ending for June, July, August, and September.
- Appointments:** A section for 'Thursday June 13, 2019' stating 'No appointments scheduled for today.'

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

# Submitting a Revised, New or Amended Plan

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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)

# Plan has Met CFR Review Criteria

**Lopez, Mark** DOB 02-22-2002 Medicaid ID 987987987  
Age 17 years Gender

Home > Lopez, Mark > Plans > Plan

Plans  
Plan Details  
Meetings  
Assessments

### Person Centered Plan

#### Plan Review

Submit for Review     Under Review     Submit for Clinical Review     Submit Decision

#### Plan Details

Customer	Idaho	Person responsible for monitoring plan	Ritter, Karolin
Plan ID	P0249	Admin Reviewer	Kennedy, Zachary
Plan Type	Initial	Clinical Reviewer	Tsao, Dai
Reason for Plan	New	Review Status	Met
Start Date	05-30	Current Plan Status	Active
Next Review Date	05-29-2020	Plan Status Dates	Active    06-03-2019, 06:46:40 AM
Date of Last Revised Plan			Under Review    06-03-2019, 06:26:45 AM
			Ready for Review    06-03-2019, 06:18:54 AM
			New    05-30-2019, 04:43:50 PM

Available on Portals  Yes  No

Services  Behav Mod/Consult  BH  Case Mgmt

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

**Sans, Wladyslawa I** DOB 02-01-2008 Medicaid ID 0001237894569 Age 11 years Gender

Home > Sans, Wladyslawa I > Plans > Plan

Person Centered Plan

Plan Review

Submit for Review Under Review Submit for Clinical Review Submit Decision

Plan Details Attachments

Plan Details

Customer	Idaho	Person responsible for monitoring plan	Cavalcanti, Rafaela
Plan ID	P0405	Admin Reviewer	Kennedy, Zachary
Plan Type	Initial	Clinical Reviewer	Tsao, Dai
Reason for Plan	New	Review Status	Not Met
Start Date	06-12-2019	Current Plan Status	Inactive
Next Review Date	06-11-2020	Plan Status Dates	Inactive 06-17-2019, 12:48:43 PM
Date of Last Revised Plan			Under Review 06-13-2019, 11:59:34 AM
			Ready for Review 06-12-2019, 03:16:14 PM
			New 06-12-2019, 03:11:40 PM

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

# Plans and Statuses

**Lopez, Mark** DOB 02-22-2002 Medicaid ID 987987987 Age 17 years Gender

Individual Details [Home > Lopez, Mark > Plans](#)

Contacts

Notes

Documents

**Plans**

[+ Add Plan](#)

Total Records: 2 Show  Per Page [◀ First](#) [◀ Previous](#) 1 [Next ▶](#) [Last ▶](#)

Actions	Plan ID	Plan Type	Status	Reason	Start Date
	P0249	Initial	Active	New	05-30-2019
	P0423	Annual Update	Under Review	New	11-24-2020

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.

# View CFR Review

**Lopez, Marcus John** DOB 07-12-1995 Medicaid ID 756756753 Age 23 years Gender Male

Home > Lopez, Marcus John > Plans > Plan > Plan Assessments

Assessments

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

Actions	Assessment	Score	Status	Created	Updated	Updated By	Attachment
 	Idaho CFR Review	0	Completed	08-17-2019	08-17-2019	Harmon, Tonya	+

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.

# View CFR Review/Printing

The screenshot shows a web browser window titled "Health Conductor - Internet Explorer" with a user profile for "Lopez, Mark". The main heading is "Idaho CFR Review". Below this are navigation tabs for "Sections", "Actions", and "Scores". A key indicates that a red asterisk (\*) denotes a required question and a green checkmark (✓) denotes a completed question. The current question is "42 CFR 441.725(a)(7)" with the text: "The person-centered planning process provides a method for the person to request updates to the plan, as needed." The decision options are "Met" (selected) and "Not met". A "Clear Answer" link is present. The "Comments/Rationale" section contains the word "terrific". A dropdown menu is open over the "Actions" tab, showing options: "View & Edit" (with "Info Texts" and "Prefill is off"), "Create" (with "Clinical Notes"), "Print" (with "Blank Assessment", "Saved Assessment", and "Include Clinical Notes"), and "Save Options" (with "Clear All (Cancel)").

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

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

Access to the OSSM Portal:

- Visit [optumidaho.com](https://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.

# Portal User: Creating an Optum ID

Sign In With Your Optum ID

Optum ID or email address

Password

Sign In

[Forgot Optum ID](#) | [Forgot Password](#)

Additional options:  
[Create an Optum ID](#)  
[Manage your Optum ID](#)  
[What is an Optum ID?](#)

## Create an Optum ID

An Optum ID securely manages your account so that you can use one Optum ID and password to sign in to all integrated applications.

 [Already have an Optum ID? Sign in now](#)

### Profile Information

First name

Last name

Date of birth

mm-dd-yyyy

### Sign In Information

Your email address

Create Optum ID

Your Optum ID must have:

6 to 50 characters

At least one letter

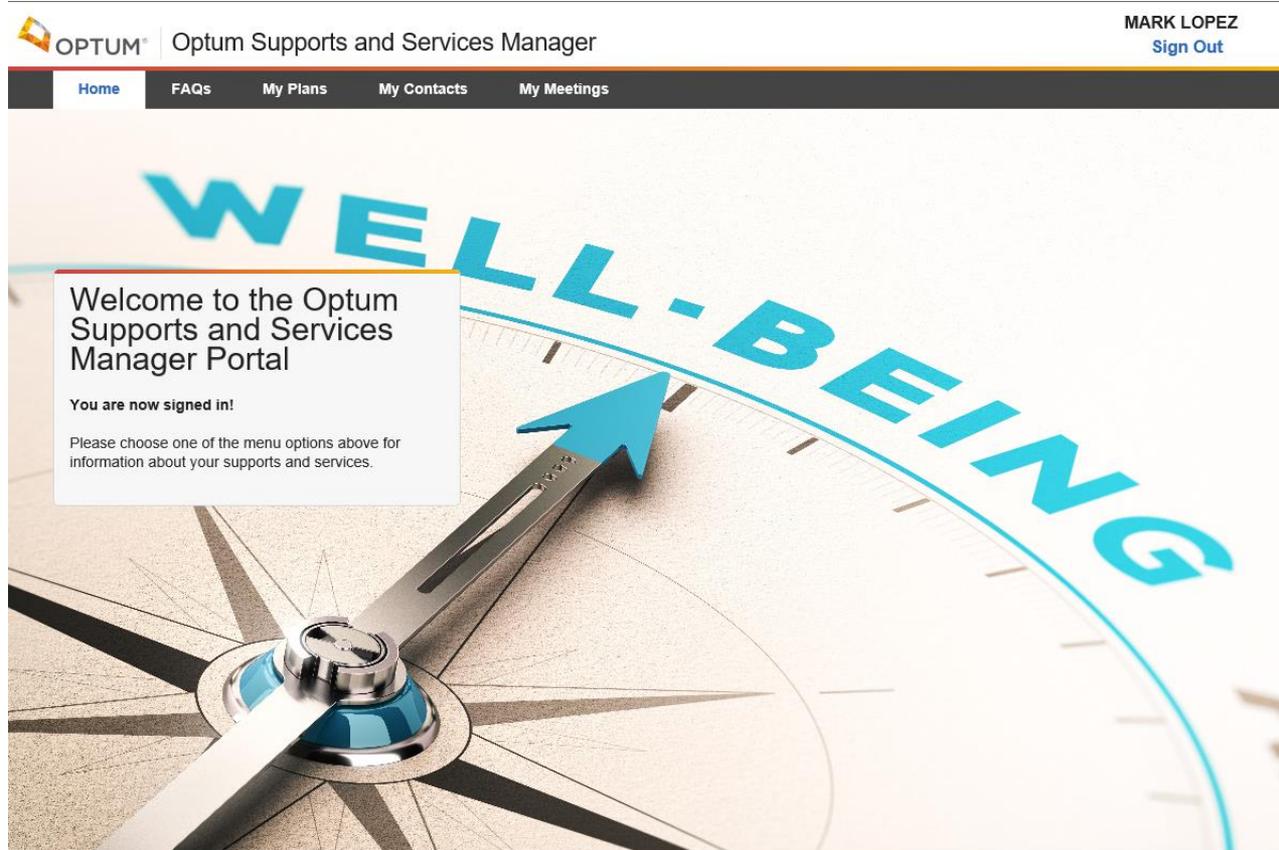
No spaces

No letters with accents

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

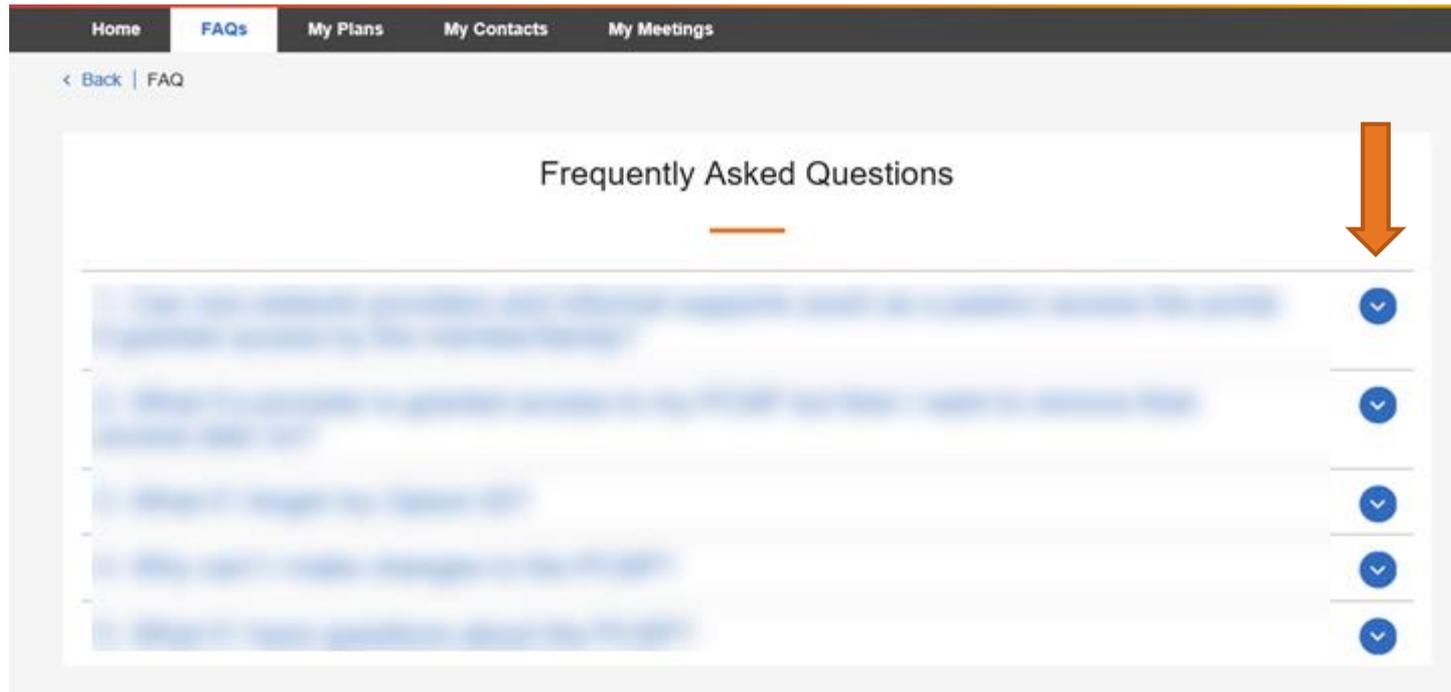
The portal user's first name, last name, and email must match what was entered by the TCC/Facilitator when the contact was created in OSSM. Portal users and the TCC/Facilitator may need to coordinate this contact information to ensure that it is accurate between the portal and how it reflects in OSSM.

# Portal User: Portal Sign-In Page After Signing In



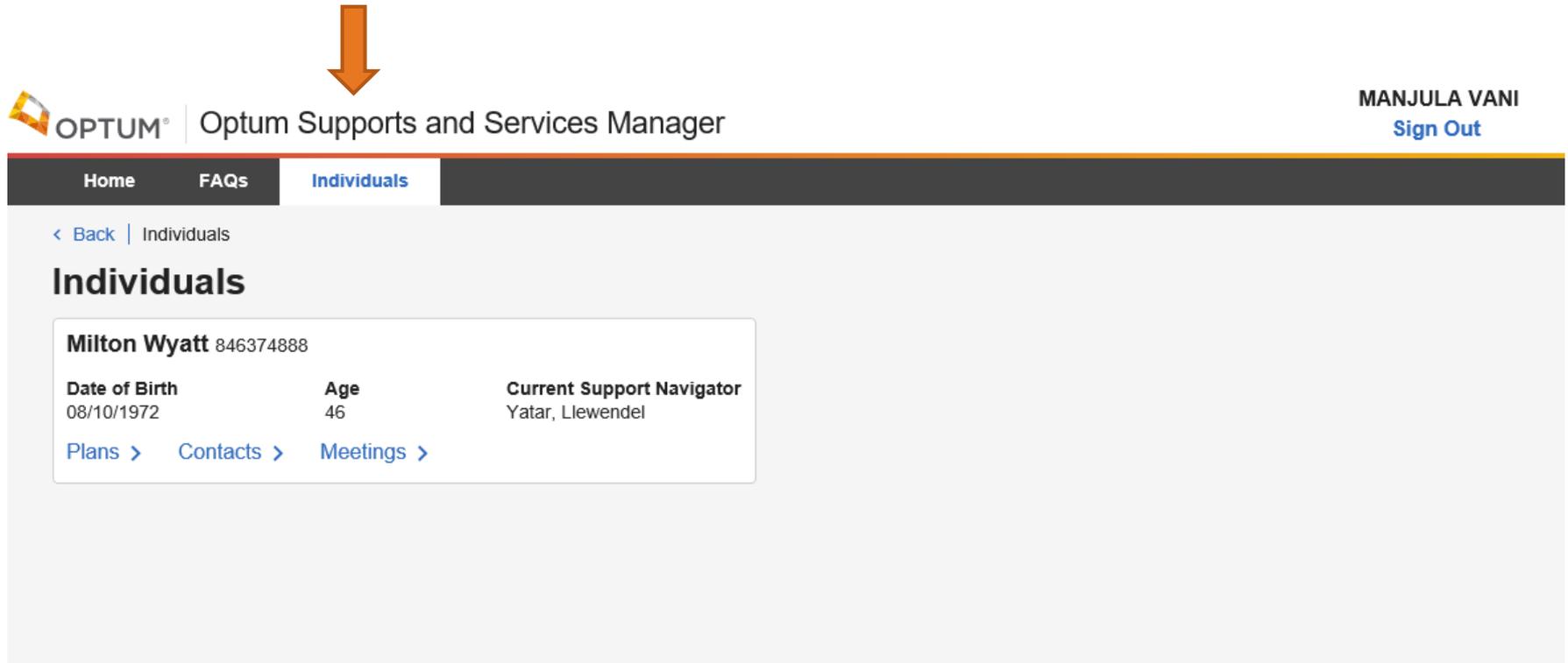
Once the member/family has successfully signed in, they will see this message. The User will click on **FAQs**, **My Plans**, **My Contacts** or **My Meetings** to see more information.

# 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

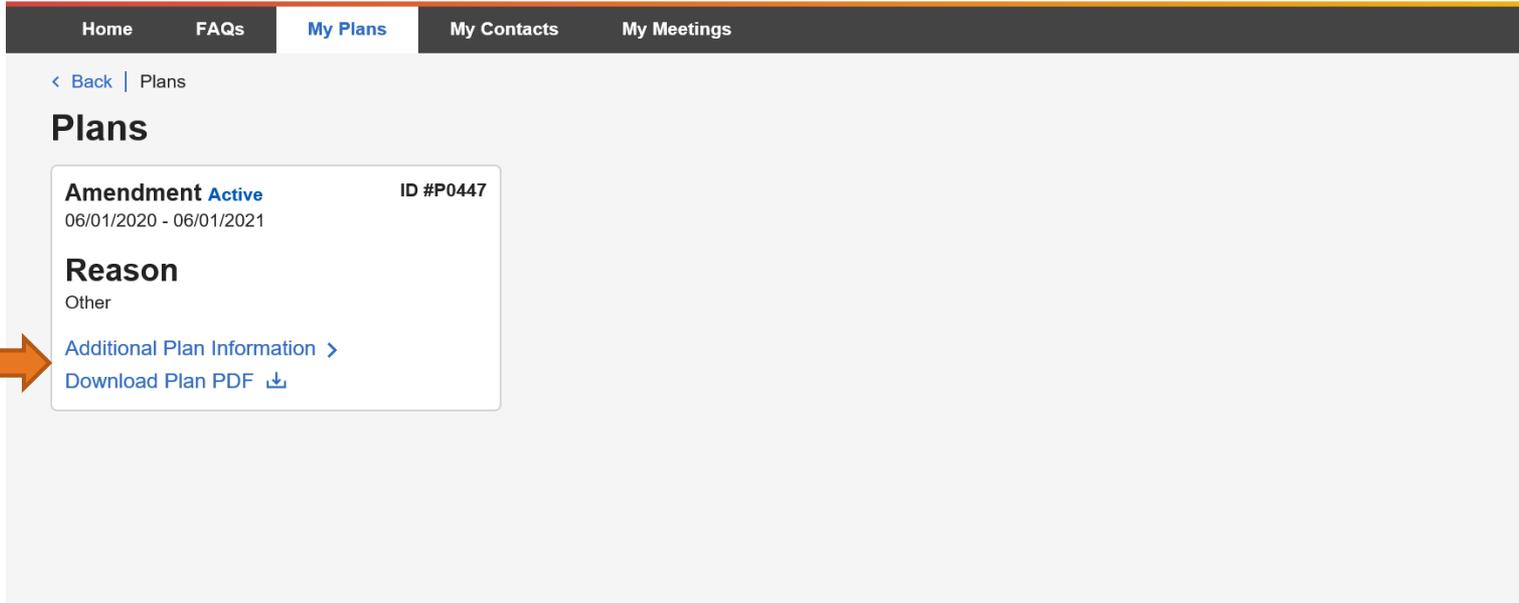


The screenshot shows the Optum Support and Services Manager portal. At the top left is the Optum logo and the text "Optum Supports and Services Manager". At the top right, the user name "MANJULA VANI" is displayed with a "Sign Out" link. Below this is a navigation bar with "Home", "FAQs", and "Individuals" (which is highlighted). Under the "Individuals" tab, there is a "Back" link and the heading "Individuals". A card displays information for "Milton Wyatt" with ID "846374888". The card includes fields for "Date of Birth" (08/10/1972), "Age" (46), and "Current Support Navigator" (Yatar, Llewendel). Below these fields are links for "Plans >", "Contacts >", and "Meetings >".

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.

# Portal User: Portal/My Plans



Home   FAQs   **My Plans**   My Contacts   My Meetings

[< Back](#) | Plans

## Plans

**Amendment Active**   ID #P0447  
06/01/2020 - 06/01/2021

### Reason

Other

[Additional Plan Information >](#)  
[Download Plan PDF ⬇️](#)

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.

# Portal User: Download PCSP PDF

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MARK LOPEZ  
Sign Out

Home | FAQs | **My Plans** | My Contacts | My Meetings

< Back | Plans

## Plans

**Annual Update Under Review** ID #P0423  
11/24/2020 - 11/24/2021

### Reason

New

[Additional Plan Information >](#)  
[Download Plan PDF ⬇️](#)

OPTUM®

Do you want to save **Am Ex Delta Flight to OR may.pdf** (93.2 KB) from **ossmportal-stage.optum.com**?

Save | Save as | Save and open

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

# Portal User: Portal / Individuals / Meetings

MANJULA VANI  
Sign Out

Home FAQs Individuals

< Back | Meetings

Milton Wyatt  
**Meetings**

Meeting Type	Status	Address
Other	Scheduled	
Meeting Date	Start Time	
09/15/2019	03:00 PM	

Meeting Type	Status	Address
Annual	Scheduled	
Meeting Date	Start Time	
06/09/2019	03:00 PM	

Meeting Type	Status	Address
Annual	Scheduled	
Meeting Date	Start Time	
05/18/2019	01:00 PM	

Meeting Type	Status	Address
Amendment	Scheduled	
Meeting Date	Start Time	
04/20/2019	07:45 AM	

Meeting Type	Status	Address
Other	Scheduled	
Meeting Date	Start Time	
09/15/2019	03:00 PM	
At Individual's Request	At Individual's Desired Date/Time?	Location
Yes	Yes	Milton's home
At Individual's Desired Location?	Attendees	
Yes	2	
	<a href="#">View Attendees</a>	

Attendees (2)			
Shayer, Nancy	Signed	Will Attend	Attended
Contact Type/Relationship			No
Wyatt, Milton	Signed	Will Attend	Attended
Contact Type/Relationship			No

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

The screenshot displays the Optum portal interface. At the top, the logo and 'Optum Supports and Services Manager' are on the left, and the user name 'MARK LOPEZ' with a 'Sign Out' link is on the right. A navigation bar includes 'Home', 'FAQs', 'My Plans' (selected), 'My Contacts', and 'My Meetings'. Below this, a breadcrumb trail shows 'Back | Annual Update Plan Under Review'. The main heading is 'Annual Update Plan' for the period '11/24/2020 - 11/24/2021'. A 'Notes' sidebar is visible on the left. The main content area features a table with columns: 'Created By', 'Role/Relationship', 'Created', and 'Subject Type'. One row is shown with 'Lopez, Mark', 'Self', '06/17/2019, 07:54 PM', and 'Portal'. An 'Add Note' link is in the top right of the table. Below the table, there is a 'Title' field and 'Note Details' text. An 'Add Note' modal is open, showing a 'Title\*' field, a 'Note Details\*' text area, and 'Save' and 'Cancel' buttons. A '4000 characters' limit is indicated at the bottom right of the text area.

Created By	Role/Relationship	Created	Subject Type
Lopez, Mark	Self	06/17/2019, 07:54 PM	Portal

**Add Note**

Title\*

Note Details\*

4000 characters

Save Cancel

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

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MARK LOPEZ  
[Sign Out](#)

Home | **FAQs** | **My Plans** | **My Contacts** | My Meetings

[Back](#) | Contacts

## My Contacts

Contacts:

Name	Contact Type, Relationship	On Support Team	Portal Access	Phone	Organization, Address
Adams, Manny	Personal Parent	Yes	Yes <a href="#">View Access</a>	111-222-2342 Office Alternative	321 East Ave, Boise, ID, Idaho, 33456
Popcorn, Cherry	Personal Parent	Yes	No		421 East Ave, Boise, ID, 55678

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.

