Transcript of Optum's
Revenue Performance Advisor (RPA)
restoration update webinar, April 3, 2024

And thank you for joining today's call. My name is Heather Vollmer with Optum, and I will be your host today. Before we begin, please note the following housekeeping items. At the bottom of your audience console are multiple application widgets you can use to customize your viewing experience.

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Thanks, Heather. Hello and welcome everyone. My name is Cindy Klain and I lead the administrative software business here at Optum. I appreciate you joining today's call and we certainly recognize the disruption that this has caused your organization and are anxious to restore its service and bring you back online. The purpose of today's conversation is to begin the preparation for restoration of Revenue Performance Advisor or RPA.

During this webinar, we will provide security updates and take you through an overview of operational readiness considerations, followed by Q&A. Please note that you can enter questions into the chat at any time throughout the session. Following this webinar, you can expect subsequent communications and details regarding next steps for reconnecting next week.

Joining me today is Josh Dyba, Deputy CISO at Optum, and Patrick Leonpacher, Vice President of Product for Revenue Performance Advisor. Josh?

Yeah. Hi, thanks. Appreciate it. Appreciate everyone's time today to join us for this information sharing. So kind of get into the info security piece here, cover quite a few things real quickly.

So, steps we've taken to secure our network. Um, as previously shared, we are committed to transparency through this ongoing analysis into the recent cyber incident affecting the Change Healthcare environment. Since day one, we have been working closely with Mandiant and Palo Alto Networks. Although our analysis isn't complete yet, in the ongoing effort to share information, we do want to provide an interim update for the healthcare sector and obviously this community of stakeholders.

A thorough forensic analysis is currently underway. Through this analysis, we have identified the source of the intrusion and with high confidence we've established a safe restore point. That point allows us to move forward safely and securely in restoring the data and systems that have been impacted.

Uh, again, working with Palo Alto Networks, then their Unit 42 experts, they were on the ground from day one, uh, collaborating diligently with UnitedHealth and all of our partners to restore operations and ensure swift and secure resolution following the disruption. To date, we've reviewed and protected a large majority of infrastructure, including the server and application space, and we've had their assistance in bringing critical services back online. It's allowed for more than nine million prescriptions to be filled to date.

Uh, security assurances. I know that's something that's pretty important to folks. We continue to work aggressively on the restoration of our systems and services. As we bring up services, many of you will want and need to see a third-party assurance. Again, working with Mandiant and Palo Alto and Bishop Fox, these are some of those third parties that we've had involved in all of the scanning, securing, and pen testing of these new setups. And we're striving and we are going to continue to strive to make available third-party assurances whenever it's feasible.

Overall, we continue making progress with forensics, launching foundational services, and restoring service with full focus on assurance and exchange. Other work is happening in parallel, though, and we do expect those services to come up first, given the priority. Anything remaining under forensic review at this point is isolated on a dedicated network with hardware isolation, and it's unreachable without direct cabling access.

And our developers, they have remote access into our green network and are actively working on service restoration. When we look at our business to business connections, those connections will have credentials reset in a vast majority of the cases. We do know that resetting B2B passwords can be challenging for some customers, however, as any security firm is going to tell you, it is only the only way to ensure the safety of the connection for all parties.

So, in our conservative approach, we will be, we will be, uh, kind of really diligent about those resets. For Optum, UnitedHealthcare and UnitedHealth Group systems, they do remain safe and were not impacted by this issue. We, we are regularly scanning those environments and we continue to validate they were not impacted.

Anything currently functioning means we have full confidence in it. We're going to continue to share more information on the process as we receive security assurances, make those available as we move forward and I'll pass it over to Patrick now.

Thank you, Josh. Again, my name is Patrick Leonpacher, VP of Product covering Revenue Performance Advisor. I'm happy to report that Revenue Performance Advisor will be coming back online this week for reconnection and testing in a phased manner. We want to give you a preview of those steps that we're taking to restore services.

As I mentioned, that restoration will start on Friday. At that point, we'll then bring connectivity to our clients in a phased approach in the days and weeks following. RPA will come back in a prior- in phases based on a prioritized list of functionalities and capabilities. Our initial phase, phase A, is for direct claims submission.

RPA will offer the users the ability to log into the software and submit claims manually or to load the batch claim file through the user interface. This method is valid for users that previously submitted claims in this fashion. We are focused on critical claims submission only in this initial phase A.

As part of this, RPA is being connected to an updated clearinghouse connection. So some payer edits that providers may have seen previously may be temporarily unavailable. ERAs, attachments, denials management, eligibility, and claim status are not part of this initial phase. To mitigate high volume traffic as we're restoring the RPA application, user enablement will occur in waves over this coming week.

Again, the initial connection for some users will be Friday, April 5th, followed by an additional set of users on April 9th, and a third wave of users on April 11th. This will be again for users that previously submitted through direct data entry or batch portal submission through the user interface. A CSA will come out to you and your organization, a customer service advisory, you and your organization, uh, identifying which of those waves and dates your organization is a part of.

Phase B, this is for our bulk claim submission for users and partners that connected to us through an SFTP batch file connection. First thing to note as part of this second phase is

RPA is updating the way customers and partners load files via SFTP. All file transfers will now be performed through Optum's enterprise communication gateway.

This will require new links and credentials for all customers that previously submitted batch files to RPA. These ECG SFTP setups will begin the week of April 15th, planning to reconnect all existing customers over a three week period, beginning the week of April 15th. And again, a customer service advisory will come out to you and your organization, identifying which week we're targeting your organization to begin that implementation work, to set up this new ECG connection.

Critical claim submission was the focus of these two initial phases. Our third phase C is for real-time transaction support. This is claim status and eligibility transactions and attachments. RPA support for real-time transactions and attachments will come in a future phase. We have not identified a timeline for that, so this is in a to-be-determined status, and we will communicate updated dates as we continue to restore services.

Our final targeted phase for RPA restoration is for electronic remittance advice or ERAs. Due to the updated clearinghouse connections, customers should anticipate a need to re-enroll with payers for ERAs. We are exploring ways to bulk-update those enrollments with payers, and we'll continue to let you all know of specific updates as we work through that ERA process.

ERAs are required for several capabilities within RPA. This includes denials management, account receivable balances, and some claim statuses. So clearly those capabilities will be tied to this final Phase D for ERA connectivity.

As we move to restoring functionality, what are the steps you can take now? The first, RPA had rolled out the Optum One Health ID to access the software; that will still be required and ultimately the same credentials you used previously will get you into the RPA software. Important to note: RPA or password resets may be required due to inactivity.

As mentioned, as part of phase B, the SFTP method is changing, to be supported in this initial release. Those will begin the week of April 15th and planned over a three-week period. It will take time to get through all of our customers reconnected with SFTP via our Enterprise Communication Gateway tool.

We'll continue to share more information on how to connect through this service, because again, you may, there's a white listing and other requirements to complete that ECG connection. Ss part of the CSA, expect to see a link where you can submit information to help us with that process to get you reconnected through the ECG, uh, solution.

As I mentioned, we do expect, uh, payer mappings to change as part of the change in clearinghouse. While we'll look for ways to streamline those changes and make it easier on our customers, expect an updated payer list and payer IDs to be posted in our community.changehealthcare.com as well as within the RPA solution.

CSAs as well as the community will continue to be used to inform users of changes. Please be sure to understand those changes as they are communicated in those different forums.

As I mentioned, the user community will be an active place for us to provide updates on the RPA restoration process. This will include tip sheets, updates on phased rollouts, a place to see recorded webinars, as well as customer support processes during this restoration timeframe. We do ask that customers leverage our online tools, especially for our support request process. Uh, to help our technicians focus on answering customer questions, we're asking customers to submit any support cases through our Customer Care Hub. That can be found at customercare.changehealthcare.com.

Again, I'd like to reiterate in this forum, this will be a multi-step process to restore connectivity to RPA. We anticipate that the application will be restored over the next few weeks with claim submission as our key initial focus. As we restore that capability, we will then progress through these other phases as we work to reconnect all of our clients, test, and operationally restore services to you all.

We will hold follow-up sessions, which we will announce at a later date. With that information shared, I'd like to move to Q&A.

Thank you, Patrick. Um, for those on the call, first of all, we have, we have hundreds of questions coming in, I understand that there are a lot of very critical and important questions here. Um, we're obviously not gonna be able to get to all of them. Um, what I'm going to do is toss a couple of questions first to you, Josh, but I do want folks to know as these questions are coming in, um, we are going to take an inventory of those. We do have your name and contact information, so we will be able to, um, to get back to you with specific answers.

Um, questions are certainly flying in very, very quickly now. We'll make sure we're able to reach out to you to get you the details that, that you do need. Um, but just quickly scanning through, Josh, there's always some questions on the types of attestations that a customer will be able to get for these systems and how they'll be able to get them. So, Josh, can you take that one, please?

Yeah, so it's a great question. We are looking wherever possible to get the appropriate third-party assurance relative to whether it's an app layer or it's the network or it's the ECG tool that was referenced prior. You know, giving you guys the pen test to let you know that you're working with a secure product.

Um, those are, uh, assurances that can be gotten through via their website, um, where there is the, the form, uh, form that you can submit to request those, or, um, always encourage people to work with their account managers to, uh, get that information as well. Again, we have some available now and as systems come back online, others will become available as it makes sense. So, always good to stay connected to your account team so you have the latest and greatest information there.

Awesome. Thank you, Josh. And then, hey Josh, one last question for you because it does seem to come up pretty frequently, is people looking to know or better understand the source of this cyber attack?

Yeah, so, again, we've been partnered from day one with law enforcement, federal law enforcement and several third parties that are considered, you know, uh, uh, highly regarded in the industry relative to what we were using them for. Through all of those partnerships, and then of course, um, our own internal teams, we have a very, very high confidence that the, uh, sort of initial source of this, um, event has been identified, uh, and that we've taken the appropriate steps to ensure that not only is it, um, fully remediated, but that we don't have any concerns either in this environment or any of the other Optum environments, uh, to have a similar event unfold, uh, like what we saw with the Change event.

Thank you, Josh. Um, so Patrick, next set of questions are going to be coming to you, and I want to start really at the, at the beginning, which is a lot of questions on, around the, the One Health ID, um, resetting a password, and how customers are going to learn that information. Um, can you walk us through that, Patrick?

Yes, and just as I scan a couple of questions, the way RPA will be accessed is the same way you accessed RPA previously. portal.RPA.changehealthcare.com. Uh, some of you users will see that that URL is up. Uh, you will see a link to the One Healthcare ID but it will not be granted until these waves that I previously communicated beginning on Friday and in a phased approach through next week. You can test your One Healthcare ID by going to that link to make sure you can access, but you will see a note that says access has not been granted yet and for your organization will be controlled based on those phases.

You will be identified for which phase and which date with a customer service advisory that will come to you and your organization shortly.

Thanks. So just to clarify, customers should be on the lookout for a CSA notification to go to an email to them that they'll receive that will let them know when they should begin logging in and when those credentials will be re-enabled. Does that sound right?

That's correct. And again, the CSA is a customer advisement. It's not a person. It is a note from our teams, a customer message to your organizations giving you information about the product and restoration.

Thanks. Um, you know, before we go through, I just kind of want to walk through some, some product specific questions that are coming in. I do see a good number of questions in here that are about either, you know, print or services that are not associated with Revenue Performance Advisor. Again, we're going to make sure we get all those questions that we're able to get back to you, but we're going to keep the questions that we go through today specific to Revenue Performance Advisor, um, and the functions within there.

So, Patrick, um, again, one last time, questions on what, what phases people are in, how they can learn that information.

Yes, so, uh, we will share that through this CSA process, but I see a couple other questions. If your organization previously logged into the UI and either manually submitted claims through the RPA UI, or manually loaded batch file connections, that is the target of our initial wave. Over the next seven days, you will be granted access into RPA to resume basic claim submission.

If your organization previously submitted batch files through an SFTP connection, that is what will begin the week of April 15th, and those connections will continue to occur in a phased rollout over the following three weeks. We intend to deliver CSAs advising each organization of that targeted timeline of restoration before the end of the week. And continue to look at, uh, and if you're not familiar with our, uh, customer portal, we'll continue to share information through that avenue. Uh, and it will be the best place for us to provide real-time information to you all.

Thanks, Patrick. Hey, Patrick, uh, lots of questions in here around, um, claim processing coming up first. Just want you to confirm that the, the next week or so, if you, you know, we're really going to be focused on claim processing and then we'll talk next with some other questions, Patrick, about, about other transaction types as well.

That's correct. So we want to get in there to make sure you all can submit your claims. Uh, in a third targeted phase is where we're, uh, we've got real-time transactions, so that's your eligibility, your claim status inquiries, and some of those other ancillary transaction types that are being asked about in questions.

The final phase of restoration is the ERAs and all of the associated functionality, and a portion of that is not just the reconnection to the clearinghouse, but ultimately the expected re-enrollments that we're working behind the scenes to, uh, make that as streamlined of a process as possible. But we do anticipate a lot of work to get all of our customers moved over to, uh, this, this different clearinghouse.

Thanks, Patrick. Um, Patrick, obviously lots of questions about ERAs, how customers can get those now, um, what are some of the steps that they, that they should be taking?

Um, for, the message for me right now is hold tight. Our teams are working on that, uh, as well as trying to work on just this initial restoration. So look for more information to come on that as we continue this restoration in phases.

Yep, and hey, Patrick, some questions here about eligibility and eligibility processing and those services that are also available within Revenue Performance Advisor.

So, eligibility is part of what we call real-time transactions and is targeted in this third phase. Um, if or as we can launch any capabilities faster, we will use our customer service advisory process as well as our customer hub to ultimately advise you of any, uh, I'll call it improvement of dates or establishment of dates on that return to service. For now, the only dates we have announced and are sharing here today is that basic, through the user interface, claim restoration process beginning Friday, April 5th and for phases of our ECG SFTP connected customers to begin the week of April 15th.

Thank you, Patrick. And, uh, you know, Patrick, we're still getting a lot, lots and lots of questions in here. Talk to me a little bit about claim history. You know, what's going to be out there when somebody first logs in and maybe what was there, you know, as the event occurred on February 21st and what will be there now?

Sure. Any information that's in RPA will continue to be in, uh, available through RPA as your logins are restored. So any data that was there prior to February 21st will be accessible by your organizations. Clearly, no other information, uh, the application, uh, access was removed to the application, so, uh, no other data, uh, will be there in the time period that you have not been connected. We weren't allowing any data to flow in or out of the solution. So as you get access back to start resubmitting claims, you will be able to access historical information as well as submit net new claims.

Thanks, Patrick. And Patrick, would, you know, just from the top again, you know, again, just tell customers one last, you know, we're going to get an email, a customer service announcement next week, and walk me through both the steps that they should take, and then we'll cover again, the phases that we should be looking for.

Perfect. So yes, expect a CSA advising you of the date by when your organization is targeted to restore services. Uh, again, that URL for RPA is portal.rpa.changehealthcare.com. Uh, as you go to that URL, it will require a One Health ID login, and only users that previously submitted through our UI will be granted access to the software in this coming week.

If your organization connected with a batch file connection through SFTP, this is typically our higher volume submitters, uh, that access will not be restored until the week of April 15th, and in a phased approach over the following three weeks, to get, uh, the vast number of our customers reconnected in a phased and controlled way to ensure we can handle the volume as everyone comes back online.

Great. And then Patrick, just walk us through those four phases one last time because people will get that notification, obviously know to take those steps, and then just walk us through again the four phases.

Sure. First phase, we're calling phase A, is our, uh, all of our users that submitted through the user interface. So, again, you manually submitted each claim at a time, or you logged in and manually loaded a batch file into RPA through the user interface. That is the initial phase. Phase B is our SFTP connections where users, uh, through their practice management or EMR system were bulk uploading files through an SFTP connection, those will begin the week of April 15th. I see a couple of questions about, uh, uh, moving access. We are not in this restoration phase. If you previously connected through SFTP, we are not moving your organization to the other connection method. We can evaluate that in the weeks to come, but as we work to restore services for all customers, we're working to restore services as you had them prior to the cyber attack.

Our third anticipated phase is our real-time transactions. So these are our eligibility transactions, our claim status inquiries, and some associated, uh, claim processes. And our final phase is ERAs remits and all of the associated functionality, uh, like account balancing, denials management that are all tied to the restoration of ERAs, and again, will be subject to, uh, validating with our, our new clearinghouse, as well as potentially the, uh, re-enrollments that will be required.

Great. Thanks, Patrick. So folks, now I do see just a tremendous number of questions in here. Many of them are very specific to how or who in your organization will receive that CSA, and certainly very specific to functionality that you'd be looking to have back as you do, as we do move through this return to service. Please know that we're going to take, um, take some time here and make sure we're answering all of these questions and getting responses back to you for those as we do work through this process in the coming weeks. Um, with that, Patrick last words, you know, last last couple of words here in the last minute we have from you on things our customers should be looking for, and then I'll take a minute just at the end, Patrick, to wrap that up.

Sure, I think just in this closing minute to all of the users here, is please go get on community.changehealthcare.com. The real-time nature with which we're restoring services and our desire to keep accurate, updated, and timely information to all of you, this will become a critical way that we communicate real-time updates about the RPA restoration. So again, community.changehealthcare.com. If you are not previously enrolled, please go get enrolled so we can take advantage of those real-time updates. We will as well support that community with CSAs or, effectively, email advisories to you and your organization, uh, but the real-time nature of the community will be a key way and another way that you can get the recorded webinars, as well as other information that we'll begin distributing in the days and weeks to come.

Thanks, Patrick. We are at time. Um, Patrick, I do want to make sure we take a minute to thank everyone. There's still lots of questions coming in. I definitely know we weren't going to get to them all. Appreciate everyone's patience and partnership as we have worked through this, and look forward to getting you reconnected here in the coming weeks. And with that, I'm going to wrap the call. So thank you, thank you, everyone.