

How to download or save files from the Optum Virtual Visits platform

Optum Behavioral Health will be discontinuing the Virtual Visits telehealth platform on Sept. 27, 2023. Providers who use the platform will not have access to patient appointment records, treatment notes or demographic information after that date.

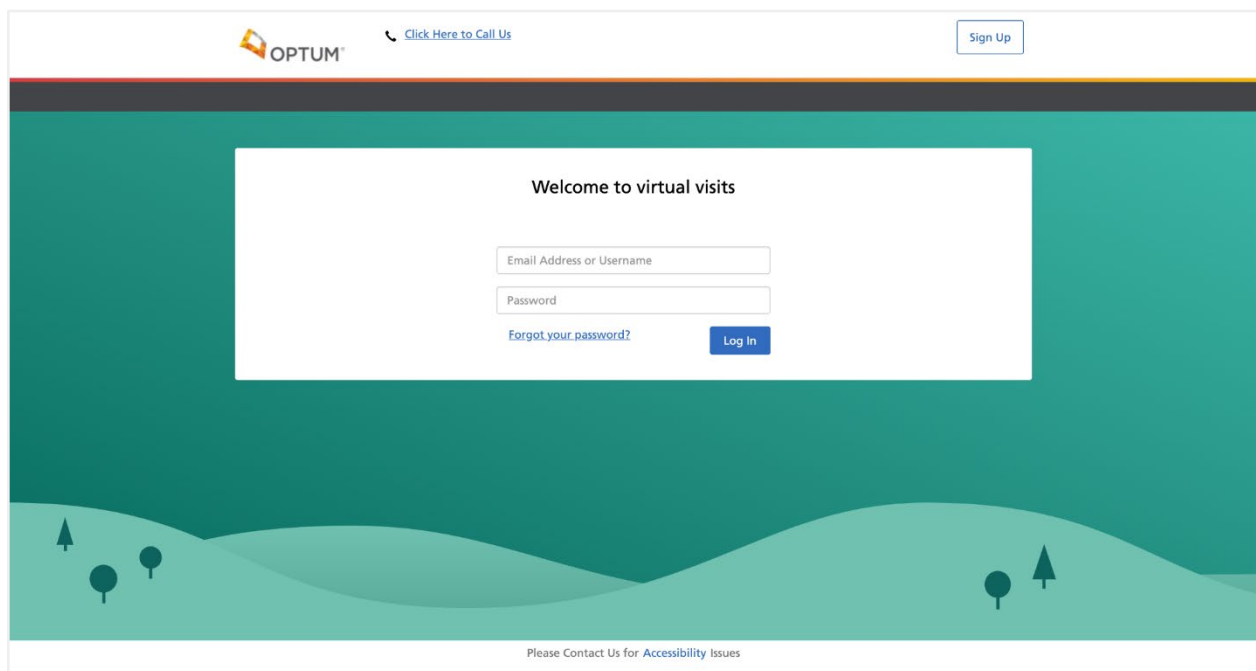
If you want this information for future reference, you will need to download and save files before Saturday, Sept. 27. This will allow you to access the files outside of the platform or transfer them to the HIPAA-compliant telehealth platform you'll use once the Virtual Visits platform is no longer available.

Within the Optum Virtual Visits platform, documents may be found in three different sections of the platform: Documents, Patients and Reports. This guide will walk you through the process of downloading files from each section.

If you have questions or need assistance, please contact our technical support team at 1-844-386-7357.

Log in to your account

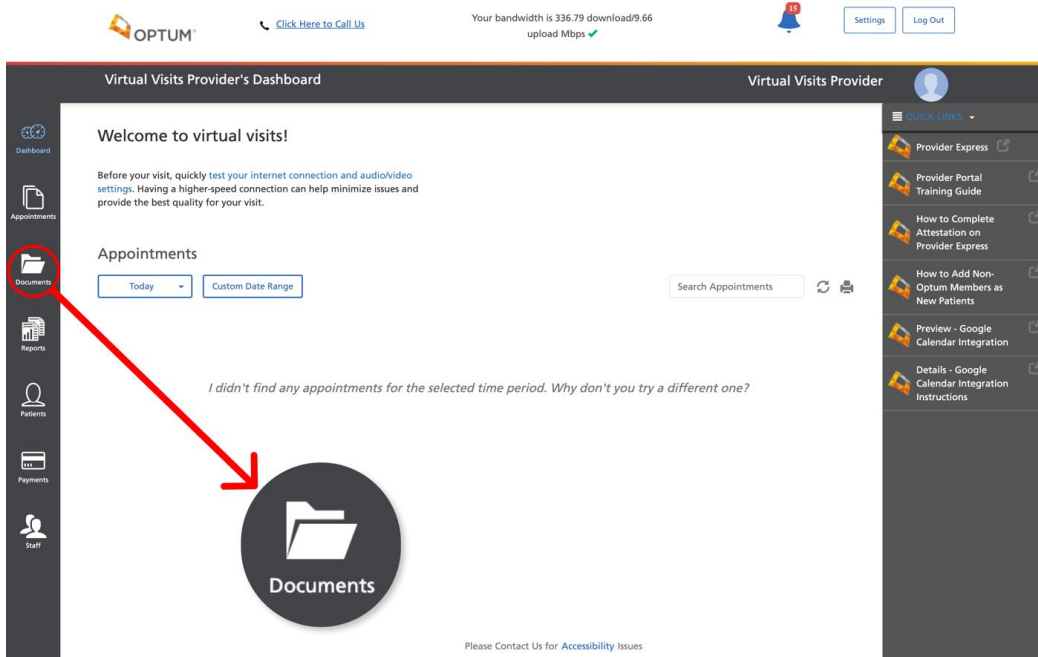
Simply go to <https://provider.virtualvisits.com/v3/login>



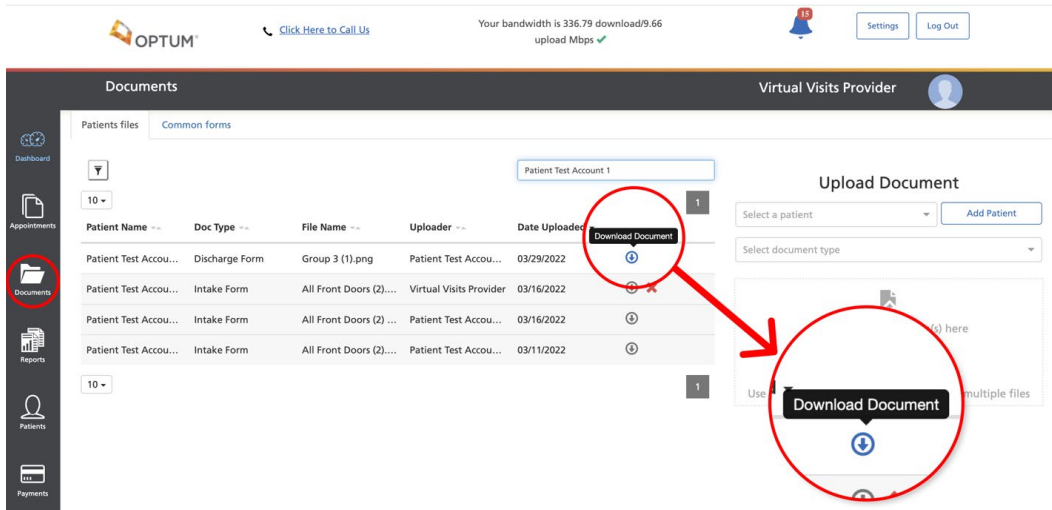
Downloading Shared Documents

Step 1: Go to Documents

1. Once you are logged into your Dashboard, select the **Documents** tab from the left navigation menu.



2. Then, select the **Download Document** button for the file you want to save to your computer. Repeat this for all files you want to download from the **Documents** tab.

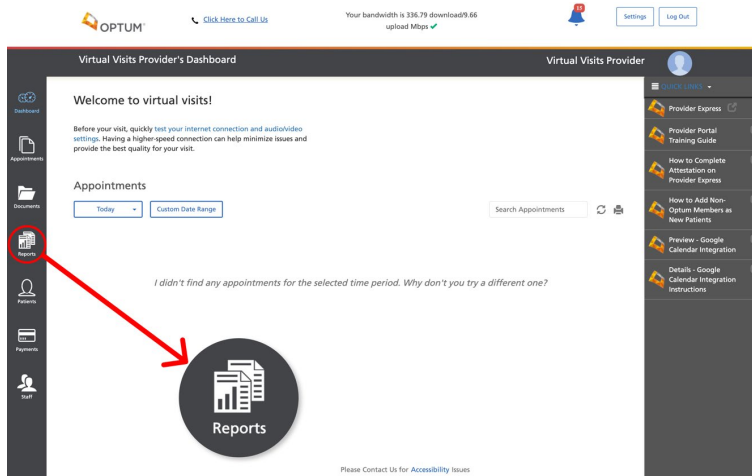


Downloading Treatment Notes

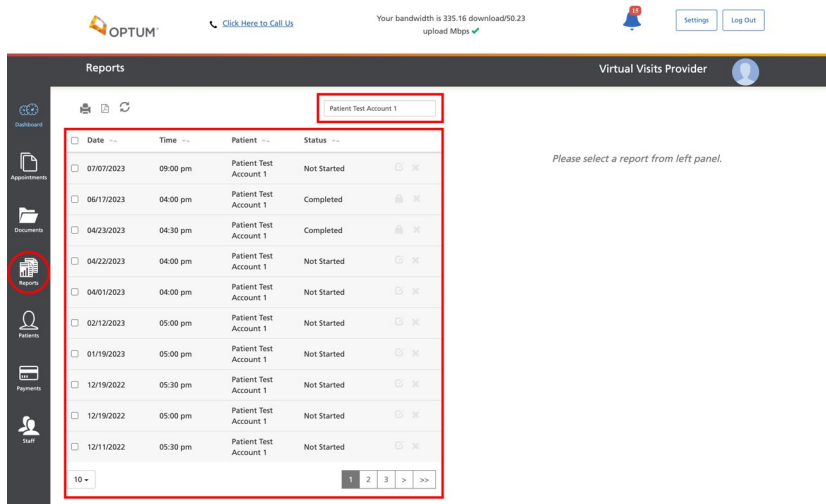
Method 1: For mass download of treatment notes for an individual patient

Go to Reports

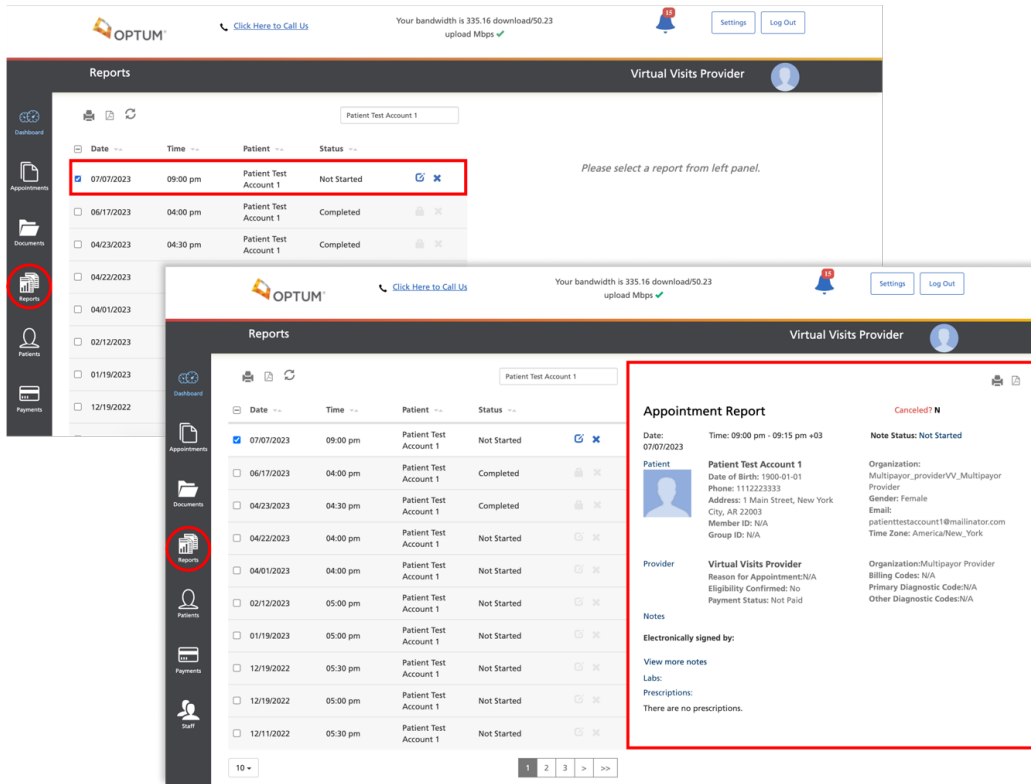
1. Select the **Reports** tab from the left navigation menu.



2. Look up the patient's name in the **Search Appointments** bar or review the reports list manually. You do not need to select a Custom Date Range. By specifying a patient, it will generate all reports available for that patient.



3. Select a report by clicking on it.



4. **OPTIONAL:** Under the appointment report, you can click on “view more notes” in the appointment report section, to display all the treatment notes associated with the patient.

Appointment Report

Date: 07/10/2023 Time: 11:30 am - 12:00 pm EDT

Patient



Patient Test Account 1
 Date of Birth: 1900-01-01
 Phone: 1112223333
 Address: 1 Main Street, New York City, AR 22003
 Member ID: N/A
 Group ID: N/A

Provider

Virtual Visits Provider
 Reason for Appointment: N/A
 Eligibility Confirmed: No
 Payment Status: Not Paid

Canceled? N

Note Status: Not Started

Organization: Multipayor_providerVV_Multipayor
 Provider
 Gender: Female
 Email: patienttestaccount1@mailinator.com
 Time Zone: America/New_York

Notes

Electronically signed by:

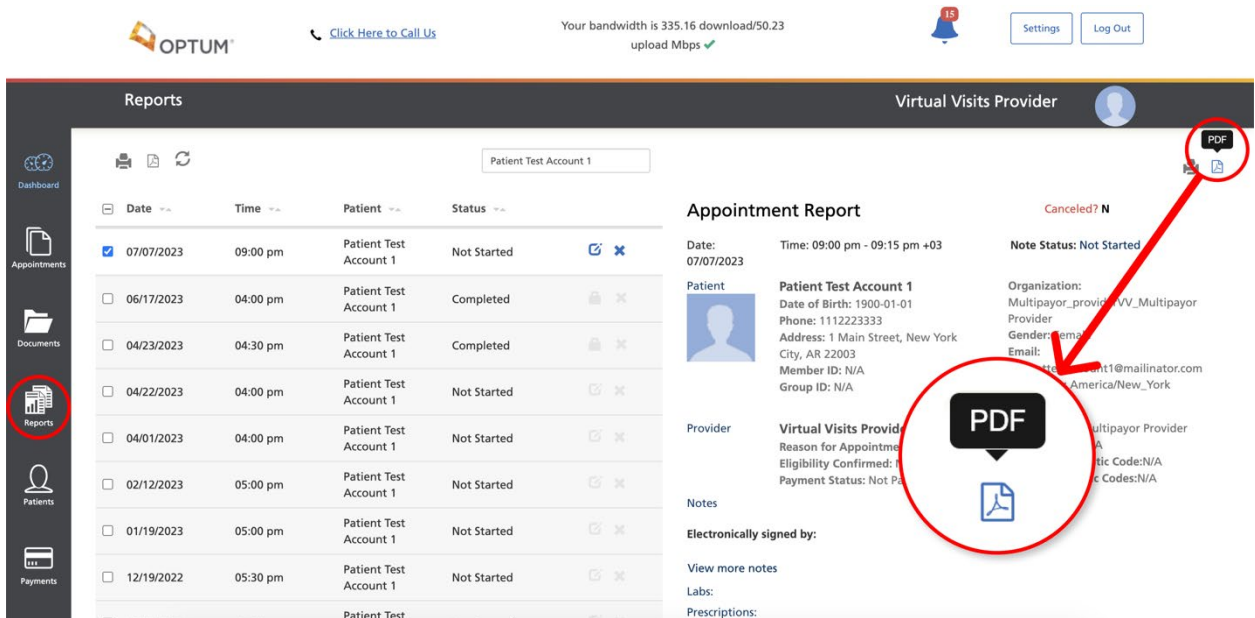
[View more notes](#)

Labs:

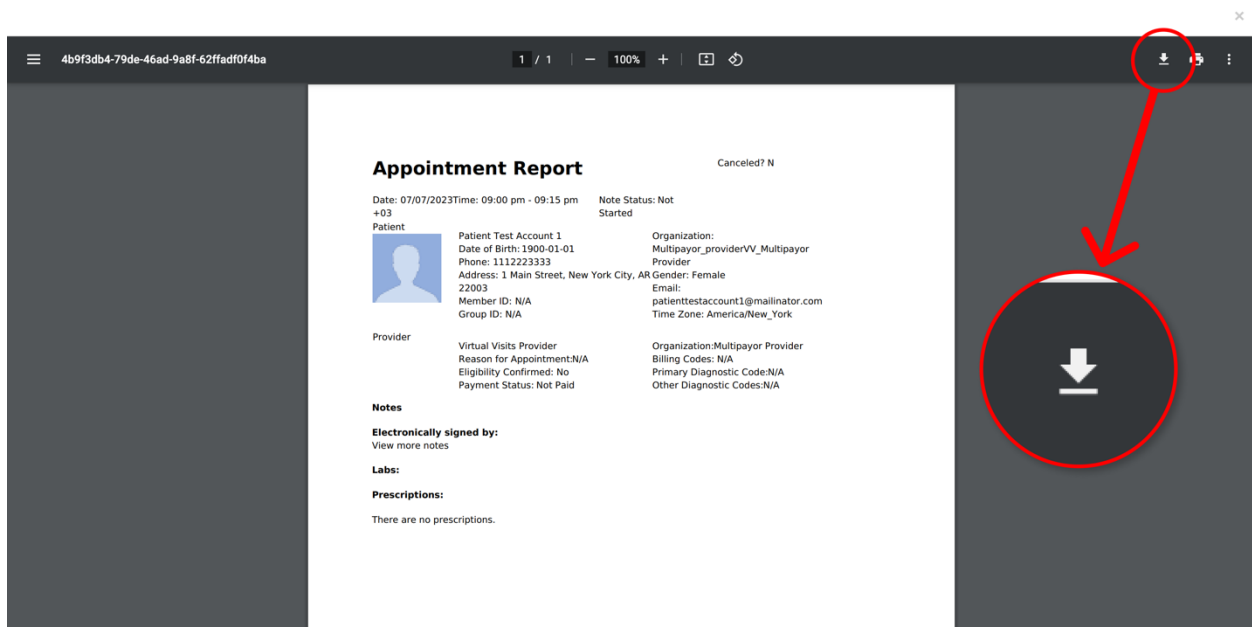
Prescriptions:

There are no prescriptions.

5. Select the **PDF button** to generate a PDF of the report. Please note: if you selected “view more notes”, it will create 1 PDF with all treatment notes for the selected patient.



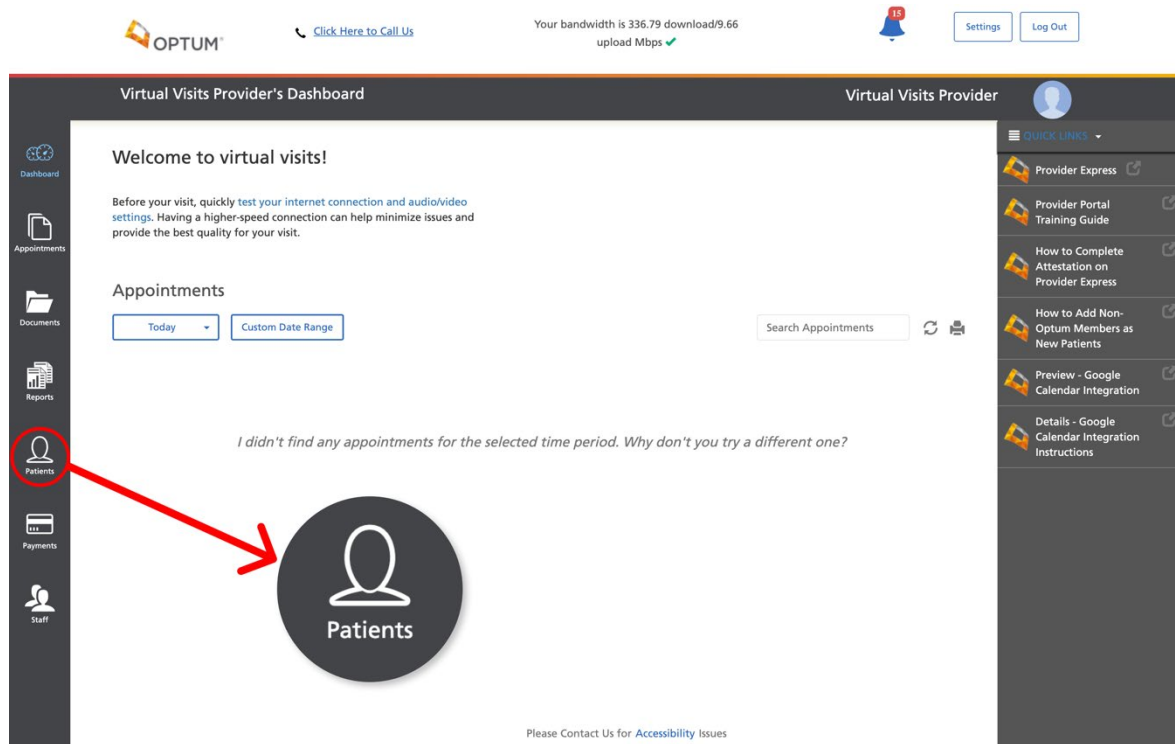
6. Select the **Download button** to save the PDF to your computer. Repeat this for all files you want to download from the **Reports tab**.



Method 2: For a specific appointment date and treatment notes

Go to Patients tab

1. Select the **Patients tab** from the left navigation menu.



- Look up the patient's name in the **Search bar** or review the patient list manually. Then, select a patient by clicking the box next to their name. (Note: The patient needs to have at least one completed treatment note.)

The screenshot shows the OPTUM Virtual Visits Provider interface. At the top, there's a navigation bar with the OPTUM logo, a 'Click Here to Call Us' link, bandwidth information, a notification bell, and 'Settings' and 'Log Out' buttons. The main area is titled 'Manage Patients' and 'Virtual Visits Provider'. On the left is a sidebar with icons for Dashboard, Appointments, Documents, Reports, Patients (highlighted with a red circle), Payments, and Staff. The 'Manage Patients' section includes an 'Add Patient' button, 'Active' and 'Inactive' tabs, a search bar (highlighted in red), and a table of patients. The first patient, 'Patient Test Account 1', is selected (checkbox checked) and highlighted in red. The patient's profile is shown on the right, including a placeholder image, name, date of birth, phone, address, gender, email, and time zone. Below the profile is a table with columns for Organization, Local Police Department, Emergency Contact, and Family Physician. The 'Appointments' section features a '+/- 30 Days' dropdown, a 'Custom Date Range' button (highlighted in red), and a search bar. The appointments table has columns for Date, Time, Provider, and Status, with two rows of data.

- Select a **Custom Date Range** that you want to download files for. This could be the entire history of your work with the patient or a specific time period.

This screenshot shows the same interface as the previous one, but with the 'Appointments' section expanded. The 'Custom Date Range' button is highlighted in red. A modal window titled 'Choose A Custom Date Range' is open, showing two calendar views for January 2023 and July 2023. The date 07/10/2023 is selected in the July calendar. The modal also includes a 'Select' button at the bottom right.

4. Review the list of appointments generated.

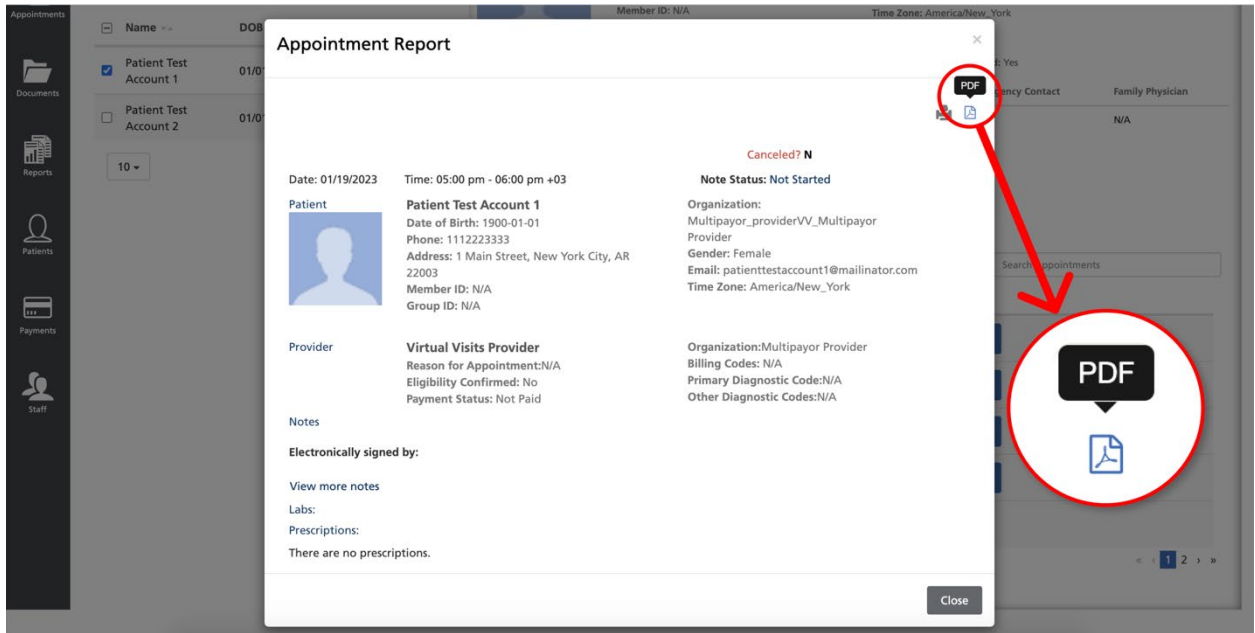
The screenshot shows the Optum Virtual Visits Provider interface. At the top, there is a header with the Optum logo, a 'Click Here to Call Us' button, bandwidth information (335.16 download/50.23 upload Mbps), a notification bell with '15', and 'Settings' and 'Log Out' buttons. The main area is titled 'Manage Patients' and 'Virtual Visits Provider'. On the left is a sidebar with navigation icons: Dashboard, Appointments, Documents, Reports, Patients (highlighted with a red circle), Payments, and Staff. The main content area is split into two panels. The left panel shows a list of patients with columns for Name, DOB, and Sex. Two patients are listed: 'Patient Test Account 1' and 'Patient Test Account 2'. The right panel shows the details for 'Patient Test Account 1', including a profile picture, date of birth (01/01/1900), phone number (11222333), address (1 Main Street, New York City, AR 22003), gender (Female), email (patienttestaccount1@mailinator.com), and time zone (America/New_York). Below this is a table with columns for Organization, Local Police Department, Emergency Contact, and Family Physician. The 'Appointments' section is highlighted with a red box and contains a table with columns for Date, Time, Provider, and Status. The appointments listed are:

Date	Time	Provider	Status	Actions
2023-01-19	05:00 PM - 06:00 PM	Virtual Visits Provider	Not Started	Edit Note Report
2023-02-12	05:00 PM - 05:30 PM	Virtual Visits Provider	Not Started	Edit Note Report
2023-04-01	04:00 PM - 04:15 PM	Virtual Visits Provider	Not Started	Edit Note Report
2023-04-22	04:00 PM - 04:15 PM	Virtual Visits Provider	Not Started	Edit Note Report
2023-04-23	04:30 PM - 05:00 PM	Virtual Visits Provider	Completed	Report

5. Select the Report button to open the file for that appointment.

This screenshot is similar to the previous one but focuses on the 'Appointments' table. The 'Report' button for the first appointment (2023-01-19) is highlighted with a red box. The sidebar navigation is also visible, with the 'Patients' icon highlighted. The patient details and organization information are the same as in the previous screenshot.

6. Select the PDF button on the Appointment Report pop-up to generate a PDF of the report.



7. Select the Download button to save the PDF to your computer. Repeat this for all files you want to download from the Patients tab.

