

EAP Appointment Request Feature Training

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Housekeeping items

Instructor:



Barry Cassell, Manager Provider Training

- Today's webinar will be 60 min in length
- Phones will be muted throughout the webinar
- Please submit questions using the chat feature
- Q&A will be conducted at the end of the presentation

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Agenda

Opt-in Process

Signing in

Viewing the dashboard

Open requests

Scheduled requests

Inactive requests

Request status

Questions?



About the EAP Appointment Request Feature

Purpose:

- Members can request their own EAP appointment
- The member can select from providers in their area
- Selection can be based on location, specialty, language, etc.
- Providers can accept, modify, or, reject the request

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Opt-in process



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Opt-in process

Opt-in to participate



If you have yet to opt-in, please complete the brief intake form by visiting

<https://lp.constantcontactpages.com/sv/UyZr3lD/EAPOptInTraining>

After opting-in, we will flag you as a "Preferred Provider" in our system – making it easy for clients to find you and request appointments!



Opt-in process

 | 

EAP Appointment Request Feature Opt-In Intake Form

Thank you for your interest in our new EAP appointment-request feature. Please verify the information we have for you in our provider directory is accurate by visiting plan.carelonbehavioralhealth.com/find-a-provider.

If any information in our directory is inaccurate or needs updating, please update your information in CAQH before submitting this opt-in form.

* Provider Name

0/50

* NPI

0/50

* All emails and service locations in the provider directory are accurate (plan.carelonbehavioralhealth.com/find-a-provider)
 Yes
 No

If you answered "no" to the question above, please update your information in CAQH before continuing

[Click here to opt-in](#)

Enter name

Enter NPI number

Confirm email and service addresses are accurate



Signing in



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Signing in

Language

carelon

Sign in / Sign up ▾

Call 911 if you are in a life threatening emergency. If you are in need of immediate emotional assistance, please call EAP support at **800-865-1044** or one of [these numbers](#)

Provider Sign in

Dont have an account? [Sign up](#)

Username/email

Enter user name

Password

Enter password

[Forgot password](#)

Sign in

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[Terms of use](#) [Contact us](#) [Manage preference](#) [Privacy policy](#) LinkedIn



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Viewing the dashboard



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Viewing the dashboard

Language

carelon

John Jonas Doe
[Logout](#)

Call 911 if you are in a life threatening emergency. If you are in need of immediate emotional assistance, please call EAP support at **800-865-1044** or one of [these numbers](#)

Welcome John Doe

You have **4 new appointments** today.
Review and manage new appointment requests, approve/reject and complete your scheduled requests.

Scheduled appointments 24 today	New requests 167	Updates from the member 89	Expiring soon (within 24hrs) 02
---	----------------------------	--------------------------------------	---

Opt in for reminders Accept online appointments

Open requests | Scheduled requests | Inactive requests

Requests which require some action from you/member.

All requests Sort by: Latest requests

Name	Plan name	Reason	Problem	Date/time	Status
------	-----------	--------	---------	-----------	--------

You have 3 appointment requests expiring in 24 hours. If not reviewed they'll be moved to Inactive tab. [Got it](#) [Don't show again](#)

Use the dashboard to navigate through requests you have received.

This page will show you any open requests, scheduled requests, or inactive requests.

Let's review the different areas.



Viewing the dashboard

Welcome John Doe

You have **4 new appointments** today.
Review and manage new appointment requests, approve/reject and complete your scheduled requests.

Scheduled appointments 24 today	New requests 167	Updates from the member 89	Expiring soon (within 24hrs) 02
---	----------------------------	--------------------------------------	---

Opt in for reminders Accept online appointments

View appointments scheduled for today on your calendar



Viewing the dashboard

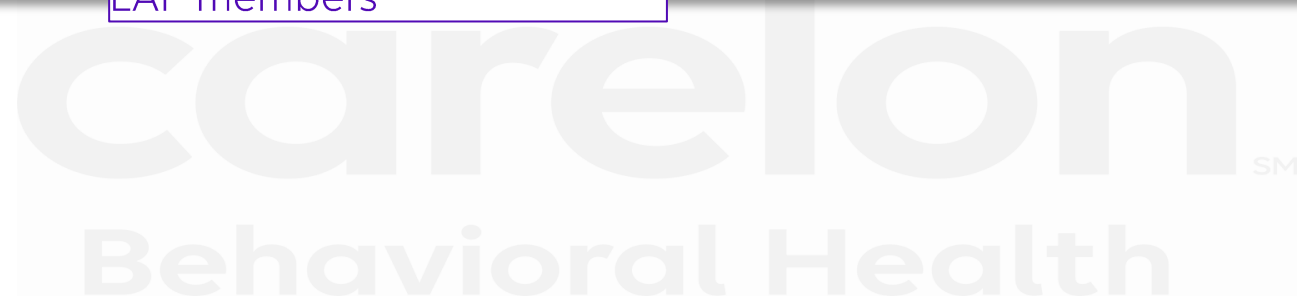
Welcome John Doe

You have **4 new appointments** today.
Review and manage new appointment requests, approve/reject and complete your scheduled requests.

Scheduled appointments 24 today	New requests 167	Updates from the member 89	Expiring soon (within 24hrs) 02
---	----------------------------	--------------------------------------	---

Opt in for reminders Accept online appointments

See any new requests from EAP members



Viewing the dashboard

Welcome John Doe

You have **4 new appointments** today.
Review and manage new appointment requests, approve/reject and complete your scheduled requests.

Scheduled appointments 24 today	New requests 167	Updates from the member 89	Expiring soon (within 24hrs) 02
---	----------------------------	--------------------------------------	---

[View updates from members](#) Accept online appointments



Viewing the dashboard

Welcome John Doe

You have **4 new appointments** today.
Review and manage new appointment requests, approve/reject and complete your scheduled requests.

Scheduled appointments 24 today	New requests 167	Updates from the member 89	Expiring soon (within 24hrs) 02
---	----------------------------	--------------------------------------	---

Opt in for reminders

Expiring requests



Viewing the dashboard

Welcome John Doe

You have **4 new appointments** today.

Review and manage new appointment requests, approve/reject and complete your scheduled requests.

Scheduled appointments

24 today

New requests

167

Updates from the member

89

Expiring soon (within 24hrs)

02

Opt in for reminders

Accept online appointments

Toggle for reminders

Toggle to accept appts



Open requests



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Open requests

Open requests
Scheduled requests
Inactive requests

the action from you/member.

All requests ▼
Sort by: Latest requests ▼

Name	Plan name	Reason	Problem	Date/time	Status
Olivia James Hawkins 32 Y F	Anthem EAP Verizon	Depression	Family Issue	<div style="display: flex; flex-direction: column; gap: 5px;"> 📅 Mon, Tue, Thr, Fri 🕒 Early Morning (6 to 9 AM) </div>	<div style="background-color: #d9d9f2; padding: 5px 15px; border: 1px solid #ccc; border-radius: 5px; display: inline-block;">New request</div>
Alena Culhane 40 Y F	Beacon EAP Boeing	-	Marital Issue	<div style="display: flex; flex-direction: column; gap: 5px;"> 📅 Thr, Fri, Sat, Sun 🕒 Afternoon (12 to 3 PM) </div>	
Tatiana Calzoni 40 Y F	Anthem EAP Verizon	Anxiety	Marital Issue	<div style="display: flex; flex-direction: column; gap: 5px;"> 📅 Thr, Fri, Sat, Sun 🕒 Afternoon (12 to 3 PM) </div>	<div style="background-color: #d9e1f2; padding: 5px 15px; border: 1px solid #ccc; border-radius: 5px; display: inline-block;">Approved by you</div>

Review open requests

New request received



Open requests

Open requests Scheduled requests Inactive requests

Requests which require some action from you/member.

All requests Sort by: Latest requests

Name	Plan name	Reason	Problem	Date/time	Status
Olivia James Hawkins 32 Y F	Anthem EAP Verizon	Depression	Family Issue	Mon, Tue, Thr, Fri Early Morning (6 to 9 AM)	New request
Alena Culhane 40 Y F	Beacon EAP Boeing	-			you
Tatiana Calzoni 40 Y F	Anthem EAP Verizon	Anxiety	Marital Issue	Thr, Fri, Sat, Sun Afternoon (12 to 3 PM)	Approved by you

Member will list time frame they are inquiring for an appointment. Request will list the reason and problem.



Open requests

Open requests Scheduled requests Inactive requests

Requests which require some action from you/member.

All requests Sort by: Latest requests

Name	Plan name	Reason	Problem	Date/time	Status
Olivia James Hawkins 32 Y F	Anthem EAP Verizon	Depression	Family Issue	Mon, Tue, Thr, Fri Early Morning (6 to 9 AM)	New request
Alena Culhane 40 Y F	Beacon EAP Boeing	-	Marital Issue	Thr, Fri, Sat, Sun Afternoon (12 to 3 PM)	Click to view request
Tatiana Calzoni 40 Y F	Anthem EAP Verizon	Anxiety	Marital Issue	Thr, Fri, Sat, Sun Afternoon (12 to 3 PM)	Approved by you



Open requests

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John Jonas Doe
Logout

Call 911 if you are in a life threatening emergency. If you are in need of immediate emotional assistance, please call EAP support at **800-865-1044** or one of [these numbers](#)

[Back](#) [New request](#)

Appointment details for Olivia James Hawkins

Profile details

Name	Olivia James Hawkins	Email	Oliviajames@gmail.com
Age	32 Years	Phone	+1 (201 - 893 - 8248)
Gender	Female	Health insurance carrier	AETNA

Do you accept this insurance carrier Yes No

Review the appoint details for the request

Confirm you accept the insurance



Open requests

Clinical questionnaire

Reason for scheduling Depression

Presenting problem Family issue

Description

I am feeling depressed since last week due to a certain level of anxiety because of some family issues. Despite my best efforts, I just can't shake off the anxiety, it's affecting my work life also. I think I need professional help because I know deep down that seeking help is the only way to get better.

Provider address

John Doe

808 Franklin Street, Huntsville, Alabama, AL, 36330

334-763-3619 | 334-763-3620

Appointment details

Member preferred day/time

 Mon, Tue, Thr, Fri  Early Morning (6 to 9 AM)

 [Select date & time](#)

Clinical questionnaire will be completed by The member. This will provide the reason for scheduling, the presenting problem, and the description of the circumstances.

Provider address details, as listed in Carelon's system.

Appoint details as provided by the member. The provider is not required to accept the proposed dates/times, and may reject the request.



Open requests

Appointment details

Member preferred day/time
Mon, Tue, Thr, Fri Early Morning (6 to 9 AM)

Approved date & time
mm/dd/yyyy Select time

← OCTOBER 2022 →

S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26

Reject Approve & send updates to member

Contact us Manage preference Privacy policy LinkedIn

Use the calendar to confirm your availability



Open requests

Appointment details

Member preferred day/time
Mon, Tue, Thr, Fri Early Morning (6 to 9 AM)

Approved date & time

10/21/2022 Select time

6:30 AM
7:00 AM
7:30 AM
8:00 AM
8:30 AM

✓ Your selected date and member's proposed time are available. The member would still need to approve the request.

Archive this request Reject Approve & send updates to member

Select the time you can see the member



Open requests

Appointment details

Member preferred day/time

 Mon, Tue, Thr, Fri  Morning

Approved date & time

10/20/2022 

6:30 AM 

 You are proposing a new date and it would require member's approval

After confirming the date and time, click on Approve and send updates to member

 Archive this request

Reject

Approve & send updates to member

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Open requests



John Jonas Doe

Logout

Call 911 if you are in a life threatening emergency. If you are in need of immediate emotional assistance, please call EAP support at **800-865-1044** or one of [these numbers](#)

Back

Once approved a notification will be sent to the member for their approval. Please allow the system to update and reflect the visit.



Appointment request approved , and updates sent to Olivia James Hawkins for approval.



Open requests

The screenshot shows a user interface for rejecting an appointment request. At the top left is the Carelon logo. At the top right, the user's name 'John Jonas Doe' and a 'Logout' button are visible. A light blue banner contains emergency contact information: 'Call 911 if you are in a life threatening emergency. If you are in need of immediate emotional assistance, please call EAP support at 800-865-1044 or one of [these numbers](#)'. The main content area is a modal dialog titled 'Reject the appointment request' with a close button (X) in the top right corner. The dialog asks the user to 'Please select a valid reason for declining this appointment request' and provides three radio button options: 'Out of clinical hours' (selected), 'Not available for the requested time', and 'Other (please specify)'. A 'Reject the request' button is located at the bottom right of the dialog. In the background, a sidebar shows a 'Back' button, 'Anthem EAP Verizon' text, 'Appointment details' section, and 'Profile details' section for Olivia James Hawkins (Age 32 Years, Gender Female). At the bottom of the page, there is a question 'Do you accept this insurance carrier' with 'Yes' and 'No' radio buttons.

If you are unable to accept the Appointment, select Reject the request.

You will need to choose if it is:

- Outside of normal office hours
- Not available for that time
- Other – please specify as to why



Scheduled requests



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Scheduled requests

Open requests | **Scheduled requests** | Inactive requests

Requests which are confirmed

[View scheduled requests](#)

Sort by: Coming up ▼

Name	Plan name	Reason	Problem	Date/time	Status
Olivia James Hawkins 32 Y F	Anthem EAP Verizon	Depression	Family Issue	03/12/2022 6:30 AM	Confirmed
Marilyn Korsgaard 32 Y F	Anthem EAP Verizon	Anxiety	Work pressure	03/12/2022 8:30 AM	Confirmed appointment
Cristofer Westervelt 32 Y F	Beacon EAP Boeing	-	Relationship Issue	03/12/2022 7:00 AM	Confirmed



Scheduled requests

Olivia James Hawkins 32 Y F	Anthem EAP Verizon	Depression	Family Issue	📅 03/12/2022 🕒 6:30 AM	Confirmed
Marilyn Korsgaard 32 Y F	Anthem EAP Verizon	Anxiety	Work pressure	📅 03/12/2022 🕒 8:30 AM	Confirmed
Cristofer Westervelt 32 Y F	Beacon EAP Boeing	-	Relationship Issue	📅 03/12/2022 🕒 7:00 AM	Confirmed
Lincoln Aminoff 32 Y F	Beacon EAP Boeing	-	Marital Issue	📅 03/12/2022 🕒 12:30 PM	Confirmed
Kierra Siphron 32 Y F	Anthem EAP Verizon	Stress	Work pressure	📅 03/12/2022 🕒 1:00 PM	Confirmed
Dulce Lipshutz 32 Y F	Beacon EAP Boeing	-	Family Issue	📅 03/12/2022 🕒 2:30 PM	Confirmed
Maria Botosh 32 Y F	Anthem EAP Verizon	Anxiety	Relationship Issue	📅 03/12/2022 🕒 3:00 PM	Confirmed
Terry Mango 32 Y F	Beacon EAP Boeing	-	Family Issue	📅 04/12/2022 🕒 7:30 AM	Confirmed

Scheduled requests will list upcoming appointments and details.



Scheduled requests

Clinical questionnaire

Reason for scheduling Depression

Presenting problem Family issue

Description



I am feeling depressed since last week due to a certain level of anxiety because of some family issues. Despite my best efforts, I just can't shake off the anxiety, it's affecting my work life also. I think I need professional help because I know deep down that seeking help is the only way to get better.

Provider address

John Doe
808 Franklin Street, Huntsville, Alabama, AL, 36330
334-763-3619 | 334-763-3620

Appointment details

Member preferred day/time

 03/12/2022  6:30 AM

[Cancel](#)

Clicking on the confirmed appointment will allow you to review the information for the upcoming session.

Should you need to cancel the appointment, click on the Cancel link.

You will be prompted to provide a reason as to why the appointment is being canceled.

Reject the appointment request ✕

Please select a valid reason for declining this appointment request

Out of clinical hours

Not available for the requested time

Other (please specify)

[Reject the request](#)



Inactive requests



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Inactive requests

Open requests Scheduled requests **Inactive requests**

Requests which are not active / not require any action (deleted, archived)

All requests Sort by: Latest requests

Name	Plan name	Reason	Problem	Date/Time	Status
Olivia James Hawkins 32 Y F	Anthem EAP Verizon	Depression	Family Issue	Mo Ea	Rejected by you
Cristofer Westervelt 40 Y M	Beacon EAP Boeing	Stress	Relationship Issue	Th Eve	Approved by others
Corey Philips 29 Y M	Anthem EAP Verizon	Anxiety	Work pressure	4/1 3:3	Rejected by member

Requests that have been rejected, accepted by another provider, or, rejected by the member. Archived requests are also stored here.

- All request
- Accepted by other providers
- Rejected by you
- Rejected by member
- Archived



Notifications



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Notifications

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John Jonas Doe
Logout

Call 911 if you are in a life threatening emergency. If you are in need of immediate emotional assistance, please call EAP support at **800-865-1044** or one of [these numbers](#)

Welcome John Doe
You have **4 new appointments** today.
Review and manage new appointment requests, approve/reject and complete your scheduled requests.

Scheduled appointments 24 today	New requests 167	Updates from the member 89	Expiring soon (within 24hrs) 02
---	----------------------------	--------------------------------------	---

Opt in for reminders Accept online appointments

Open requests | Scheduled requests | Inactive requests

Requests which require some action from you/member.

All requests | Sort by: Latest requests

Name	Plan name	Reason	Problem	Date/time	Status
------	-----------	--------	---------	-----------	--------

🔔 You have 3 appointment requests expiring in 24 hours. If not reviewed they'll be moved to Inactive tab. [Got it](#) [Don't show again](#)

A reminder will appear at the bottom of the screen for requests which will expire soon.

Click on “Got it” to acknowledge.



Notifications

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John Jonas Doe
Logout

Call 911 if you are in a life threatening emergency. If you are in need of immediate emotional assistance, please call EAP support at **800-865-1044** or one of [these numbers](#)

Welcome John Doe
You have **4 new appointments** today.
Review and manage new appointment requests, approve/reject and complete your scheduled requests.

Scheduled appointments	New requests	Updates from the member	Expiring soon (within 24hrs)
24 today	167	89	02

Opt in for reminders Accept online appointments

Open requests | Scheduled requests | Inactive requests

Requests which require some action from you/member.

All requests | Sort by: Latest requests

Name	Plan name	Reason	Problem	Date/time	Status
Appointment request archived, moved to Inactive request tab					

Requests that are archived or deleted will be shown at the bottom of the screen as a reminder. This will appear in a red box.



Request status



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Request status

Provider Dashboard - status index

open request - cases

Approved by you

| when the provider has approved an appointment with a time-slot which falls under the member proposed time-slots.

New request

| when there is a new request where the provider has not taken any action yet and the request is captured in 'open requests'.

Confirmed case

Confirmed

| when a request is confirmed by the member, it moves to the Scheduled tab with confirmed status.

Archived request

| when an appointment is archived by the provider and that is captured in the 'inactive tabs'.

Rejected cases

Rejected by member

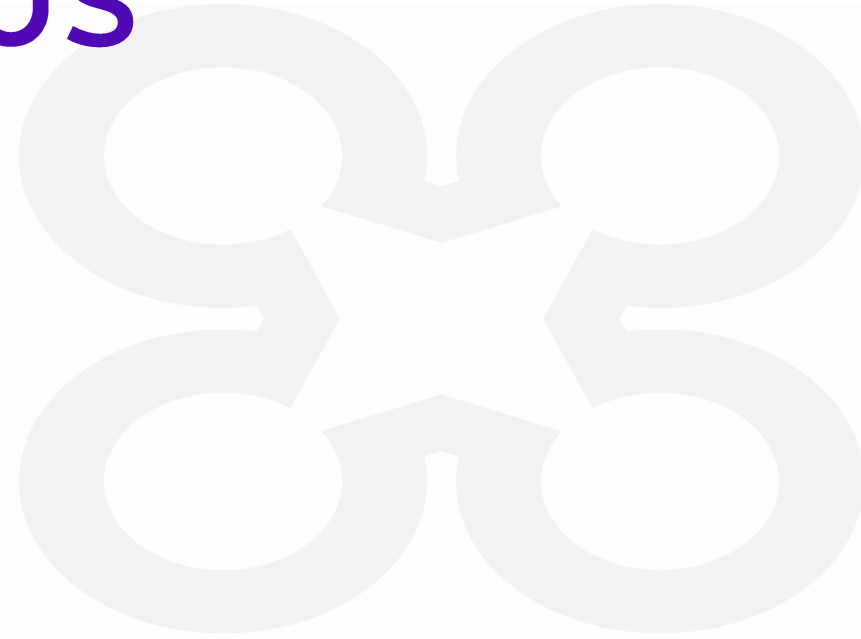
| when the member rejects an appointment .

Rejected by you

| when the provider rejects an appointment with relevant response.



Contact us



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Contact us

For any additional questions or concerns please contact us at:

EAPProviderNetworks@Anthem.com

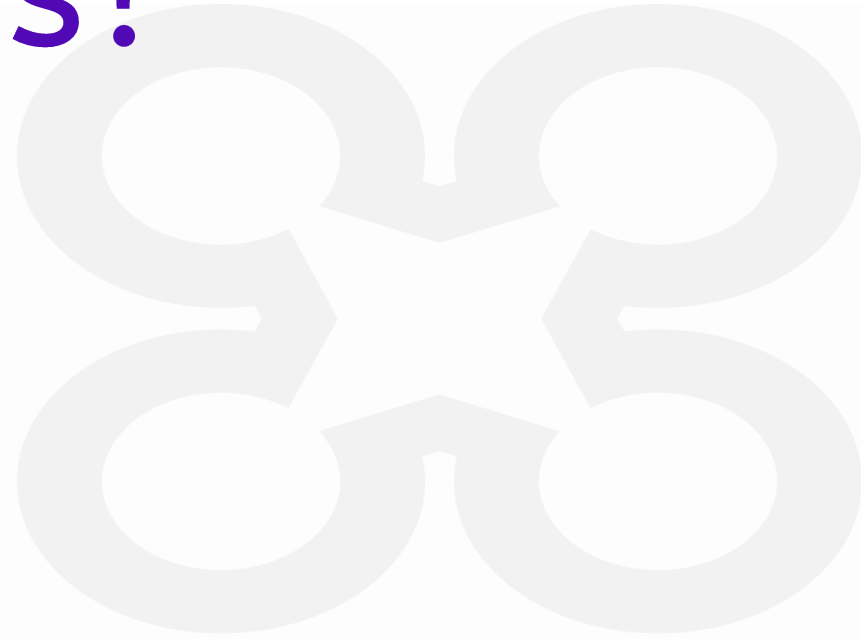
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Questions?



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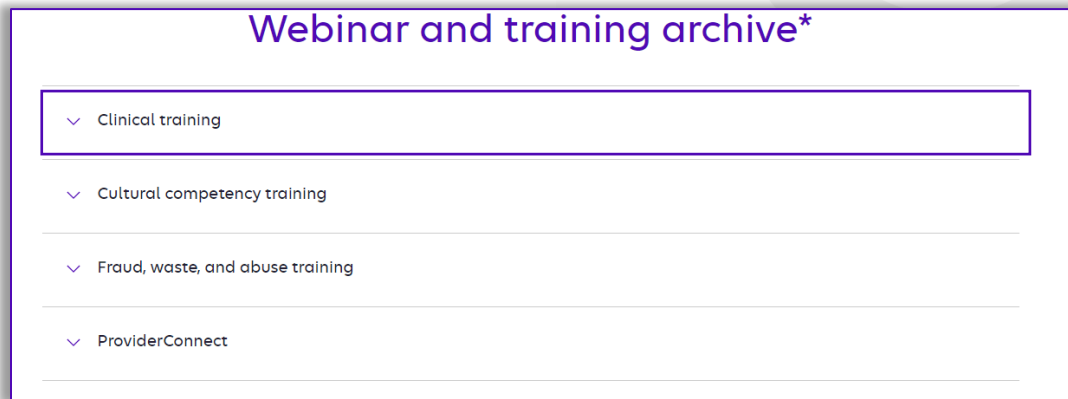
Questions??

Q: Will additional training sessions be held?

A: No additional sessions are currently scheduled.
This training is being recorded and will be posted here:

<https://www.carelonbehavioralhealth.com/providers/resources/trainings>

This will be listed under the Clinical Trainings menu.



Thank you!

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