PROVIDERfiles Provider's User Guide for

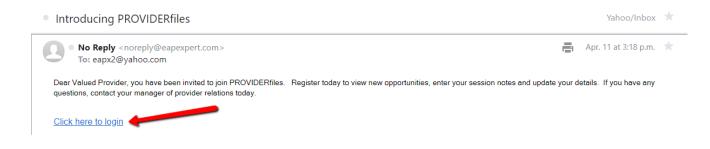


We Help People Be Better at Work



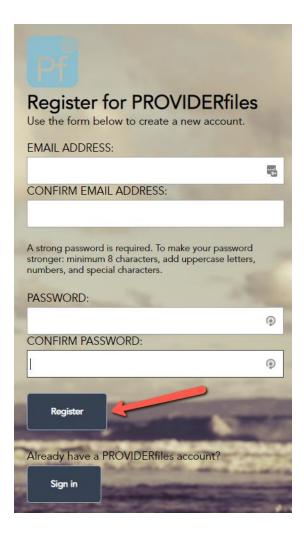
Getting Started

Upon receiving the email invitation from First Sun EAP, click the link to register with PROVIDERfiles (Pf) web portal.



To register, you must enter the same email address found in your emailed invitation as this is your username. Immediately after clicking **Register**, you will be able to sign in.





Forgot Password?

If you forgot your password, click on **Reset/Forgot Password** and follow the prompts. You will receive an email to reset it.



Welcome! Please ente below	r your user name and password
LANGUAGE:*	
English	🖫 – 🏕
	and the second second
USER NAME:	
eapexpert15@gmail	com 📑
PASSWORD:	
	/ 🖷
Don't have an accoun your EAP? Click here t	t or recently updated your email with o <u>Register</u>
Log In	Reset / Forgot Password

Already Registered?

If you have registered with Pf using a previous invitation from another EAP, there is no need to register again. Log in with your same USER NAME and PASSWORD to view opportunities and update your profile information.

Changed Your Email Address?

If you have a new email address, please notify First Sun EAP. They will update your profile information in their software. Once completed, click on the **Register** link and access your Pf information using the new email address.

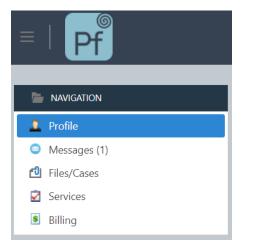
Welcome! Please ente below	er your user name and password
LANGUAGE:*	
English	R - 🕹
USER NAME:	A State of the
eapexpert15@gmai	.com
PASSWORD:	
Don't have an accour your EAP? Click here	t or recty updated your email with to Register
Log In	Reset / Forgot Password

This takes you to the registration page. (Use the same steps as when you first registered.) Enter your new email address and password twice (The second time for confirmation).



Provider Profile

Profile in PROVIDERfiles will allow you to update any information about yourself and your practice. It is important to check that this is all filled out before *you can start receiving authorizations*.



After signing in, click on **Profile** in the Navigation window. Here you will see your Details, Counseling Locations, Licensing, Liability Insurance, Documents and Knowledge Base.

Your general information is located in **Provider Details** (i.e., name, tax ID, DOB, billing/mailing addresses, email address, and phone numbers).

		сарекретст	2@gmail.com		s s	ave 🦨 Change N	ly Password
SELECTED EAP:	Demo Full PF2020	•	SELECTED PROVIDER:	Barnaby Counseling	- eapexpert12@gmail.c	om	
Provider Details	Locations	S Licensing	Liability Insurance	Documents	Knowledge Base	Accept Opportunity	
BUSINESS NAME: Barnaby Counseli	na						
EMAIL ADDRESS:							
eapexpert12@g	jmail.com						
Mailing (Please ty	/pe and choose from the list)						
ADDRESS:							

At the bottom of the screen, you will find the following under **Attributes**.



tributes				
🕏 Credentials	Specializations	Languages	Associations	Shared Provider Information
Add Remove				
NAME				
			No da	ta to display

Credentials

Click Add to update and add a new credential.

Attributes				
Credentials	Specializations	Languages	Associations	Shared Provider Information
Add Remove				
NAME				
			No da	ta to display

To display the available credentials, enter specific text to search and click on the magnifying glass to the right to display the selection(s). Check the selection box and then the information below. Click **OK** to save and return to the previous page.

Credential

Text t	to search	<mark>.</mark>
	NAME	† 7
I	Master of Divinity, Theology & Counselling	
	MCouns - Master of Counselling	
I	MCP - Masters of Counselling Psychology	
	MMT - Master of Musical Therapy	
	MSc.	•



OK

Cancel

The credentials selected are displayed in the grid.

Attributes

* C	redentials	O Specializations	C Languages	Associations	Shared Provider Information	
Add	Remove					
	NAME					
	Master of Divinity, Theology & Counselling					
	MCP - Masters of Counselling Psychology					

To remove a credential, check the box to the left and then click on **Remove**.

Attribut	tes				
۶ د	redentials	O Specializations	🔾 Languages	Associations	Shared Provider Information
Add	Remove				
	NAME				
	Master of Di	vinity, Theology & Counse	lling		
	MCP - Maste	ers of Counselling Psycholo	ogy		

You will be prompted to confirm the change. Click **OK** to remove the selection(s) or **Cancel** to return to the previous screen without making any changes.



Please make sure to click **Save** at the top of your screen after making any changes/additions to your profile.





Specializations

Click **Add** to update a new specialization.

Attributes

🦻 Credentials	Specializations	Languages	Associations	Shared Provider Information
Add Remove				
NAME				

To display the available specializations, enter specific text to search or click on the magnifying glass to the right to display all the specializations available for selection. Check the box for each one and then the information below. Click **OK** to save and return to the previous page.

Specialization

Text 1	t to search	<mark>Q.</mark>
	NAME	† Y
\checkmark	Child/Adolescent Issues	^
	Child/Eldercare Resource Assistance	
	Christian/Spiritual	
	CISM/CISD	
	Couple/Marital	



The specializations selected are displayed in the grid.



Attributes

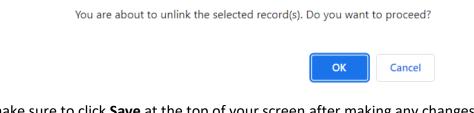
🦻 C	redentials	Specializations	Languages	Associations	Shared Provider Information
Add	Remove				
	NAME				
	Child/Adoles	scent Issues			
	Couple/Mari	tal			

To remove a specialization, check the box to the left and then click on **Remove**.

Attributes

🦻 Credentials	Specializations	Languages	Associations	Shared Provider Information
Add Remove				
Child/Adoles	scent Issues			
Couple/Mari	tal			

You will be prompted to confirm the change. Click **OK** to remove the selection(s) or **Cancel** to return to the previous screen without making any changes.



Please make sure to click **Save** at the top of your screen after making any changes/additions to your profile.



Languages



Click **Add** to update a new language.

tributes			Associations	Shared Provider Information
	Specializations	C Languages	Associations	Shareu Frovider mormation
Add Remove				
NAME				

To display the available languages, enter specific text to search or click on the magnifying glass to the right to display all the languages available for selection. Check the box for each one and then the information below and click **OK** to save and return to the previous page.

Text to	Text to search					
	NAME	† 7				
Image: A start of the start	English Farsi French German	*				
	Farsi					
	French					
	German					
	Greek					

OK	Cancel

The languages selected are displayed in the grid.

Attributes

Language

🦻 Credentia	ls 이	Specializations	Languages	Associations	Shared Provider Information
Add Remo	ve				
NAME					
English					
French					

To remove a language, check the box to the left and then click on **Remove**.



Attributes

۶ (Credentials	O Specializations	🔾 Languages	Associations	Shared Provider Information
Add	Remove				
	NAME				
	English				
\checkmark	French				

You will be prompted to confirm the change. Click **OK** to remove the selection(s) or **Cancel** to return to the previous screen without making any changes.

You are about to unlink the selected record(s). Do you want to proceed?



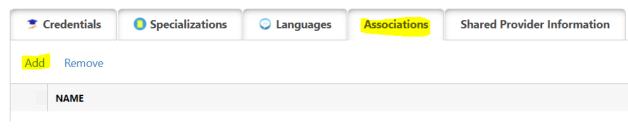
Please make sure to click **Save** at the top of your screen after making any changes/additions to your profile.



Associations

Click Add to update a new association.

Attributes





To display the available associations, enter specific text to search or click on the magnifying glass to the right to display all the associations available for selection. Check the box for each one and then the information below and click **OK** to save and return to previous page.

Assoc	ciation	
Text to	to search	<mark>.</mark>
	NAME	† Y
	AAMFT	
	American Play Therapy Association	
	AMFP Quebec	
<u> </u>	APA	
	АТСВ	

Cancel

The associations selected are displayed in the grid.

Attributes

🤹 C	redentials	O Specializations	C Languages	Associations	Shared Provider Information
Add	Remove				
	NAME				
	APA				
	AAMFT				



To remove an association, check the box to the left and then click on **Remove**.

Attributes

🦻 Credentials		O Specializations	C Languages	Associations	Shared Provider Information
Add	Remove				
	NAME				
	APA				
I	AAMFT				

You will be prompted to confirm the change. Click **OK** to remove the selection(s) or **Cancel** to return to the previous screen without making any changes.

You are about to unlink the selected record(s). Do you want to proceed?



Please make sure to click **Save** at the top of your screen after making any changes/additions to your profile.



Shared Provider Information

PROFILE IMAGE: Click on **Browse** to select an image of yourself to share with the EAP.

PERSONAL STATEMENT: Enter information you would like to share with the EAP.

UNAVAILABILITY DATE START AND UNAVAILABILITY DATE END: Enter the start and end dates of when you will not be available to receive client referrals from the EAP.

UNAVAILABILITY HISTORIES: This grid will display any previous dates you were unavailable.



Attributes

Credentials	O Specializations	Languages	Associations	Shared Provider Informa	tion	
PROFILE IMAGE:						
						Browse
PERSONAL STATE	MENT:					
JNAVAILABLE DA	TE START:					
					~	
JNAVAILABLE DA	TE END:					
JNAVAILABLE DA	ATE END:				•	
					•	
JNAVAILABLE DA JNAVAILABILITY CREATED ON		T UNAVAILABLE D	\TE START	Ŷ	- UNAVAILABLE DATE END	Ŷ
JNAVAILABILITY	HISTORIES:	♥ UNAVAILABLE D	ATE START	Ŷ		Ŷ

Please make sure to click **Save** at the top of your screen after making any changes/additions to your profile.



Counseling Locations include all locations where you offer counseling.

			Profile for	eape	expert1	2@gmail.com			Sav	re 🧏	Change My P	assword	
SEL	ECTED.) EAP:	Demo Full PF2020		*	SELECTED PROVIDER:	Barnaby Counseling	- eapexpert12@g	gmail.cor	m			.
Prov	rider [Details	L Counseling Locations	🖸 Li	icensing	Liability Insurance	🖸 Documents	Knowledge B	lase	Accept Oppo	ortunity		
New	Offic	e Location									Remove Se	lected	Ð
		NAME		Y	ADDRESS			Y	PHONE	Y	CONTACT PE	RSON	Y
	Ø	George	town Office		2 Draper	St, Georgetown, ON, CA, L	7G 3C9		55556	6565533	Kevin		
	Ø	Barnaby	/ Counseling - Bernard Ave		88 Berna	rd Avenue, Old Toronto, Ol	N, Canada, M5R 1R7		44444	44444	Tom Jones		
<	1	>										20	•

The Licensing and Liability Insurance tabs are where you keep your credentials current.

Click **New Licensing** to add your licensure information.



Provid	der D	etails	s S Licensing	Liability Insurance	🖸 Documents	Knowledge Base	Accept Opportunity		
New Li	icen:	sing					Remove	Selected 🧳	9
		LICENSE TYPE	LICENSE NUMBER	Y	EXPIRATION DATE	Ŷ	STATE PROVINCE		Y
	Ø	LCSW	654855		11/30/2021		MA		
	Ø	LCSW	654855		11/30/2020		ON		
<	1	>						20 -	,

Enter the information below and click **OK** to save and return to the previous page.

icensing			-> OK Cancel
LICENSE NUMBER:*		EXPIRATION DATE:*	
654855		11/30/2021	-
LICENSE TYPE:		STATE PROVINCE:	
LCSW	*	MA	Q 🗸

To edit an existing license, click the **EDIT** symbol.

Provide	ler D	etails	L Counseling Locations	Licensing	Liability Insurance	Documents	Knowledge Base	Accept Opportunity		
New Li	icens	sing	,					Remove Se	lected	Ø
		L' ENSE TY	PE Y	LICENSE NUMBER	Y	EXPIRATION DATE	Y	STATE PROVINCE		Y
	P	LCSW		654855		11/30/2021		MA		
	Ø	LCSW		654855		11/30/2020		ON		
<	1	>							20	•

Liability Insurance

Click **New Liability Insurance** to add your liability information.



			Profile for	eapexpert	12@gmail.com			S	ave	K Change M	ly Password	
SEL	ECTED.) EAP:	Demo Full PF2020	*	SELECTED PROVIDER:	Barnaby Co	ounseling	- eapexpert12@gmail.c	om			•
Prov	rider D	Details	Locations	S Licensing	Liability Insurance	🗗 Doc	uments	Knowledge Base	A	ccept Opportunity		
New	Liabil	lity Insu	rance					_		Remove	Selected	Ø
		INSUR	ANCE CARRIER	Y	POLICY NUMBER	Y	EFFECTIV	E DATE	Y	EXPIRATION DATE		Y
	Ø	AIG Ir	nsurance Company		265656					12/31/2020		
	Ø	Farme	ers Insurance Company		965855		12/31/2	021		11/30/2022		
<	1										20	*

Enter the information below and click **OK** to save and return to the previous page.

iability Insurance			\rightarrow	ОК	Cancel
Liability Insurance					
POLICY NUMBER:	SI	NGLE OCCURRENCE:			
265656		\$1,000,000.00			÷
EFFECTIVE DATE:	Đ	PIRATION DATE:			
Tuesday, March 17, 2020	•	12/31/2020			-
Insurance Carrier					
INSURANCE CARRIER:					
AIG Insurance Company					÷ 👌
ADDRESS:					
88 Bloor Street West, Old Toronto, ON, Canada, M5S 1M4					

To edit an existing license, click the **EDIT** symbol.

Provider Details Locations O Licensing			Liability Insurance	Documents Knowledge Base		A	ccept Opportunity			
New Liability Insurance Remove Selected										Ð
		INSURANCE CARRIER	Y	POLICY NUMBER	Y	EFFECTIVE	DATE	Y	EXPIRATION DATE	Y
	ø	AIG Insurance Company		265656					12/31/2020	
	Ø	Farmers Insurance Company		965855		12/31/20	021		11/30/2022	
<	1	>							20	•



The **Documents** tab allows you to upload documents pertaining to you as a provider. They become your profile for First Sun EAPs. To upload a document, click on **Upload** and follow the prompts.

Provider De	etails 🛛 🏦 Counseling Location	s 🕓 Licensing		Documents	Knowledge Base	Accept Op	oportunity
Upload ┥							
	DOCUMENT NAME		Ť.	FILE TYPE		Y	FILE
			G No data to display	,			
FILE:*	Bro	wse					
			Click Brows	se to loca	te the file.		

Click **OK** to confirm your selection and return to the previous screen.

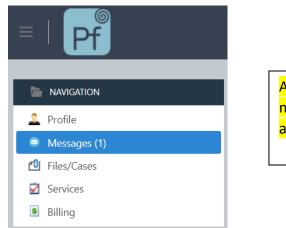
Document	ОК	Cancel
FILE:*		
COI - evidence of insurance.pdf 🔗		
DOCUMENT NAME:		
Insurance		
FILE TYPE:		
PDF		

The **Knowledge Base** tab allows you to read and download documents sent to you by First Sun EAP. This may include their policies and procedures or other important information.



	Profile for	eapexpert1	12@gmail.com		Sa
SELECTED EAP:	вно еар	Ţ	SELECTED PROVIDER:	Dunn CounselingTES	T - eapexpert12@gmail
Provider Details	Locations	Licensing	Liability Insurance	1 Documents	Knowledge Base
DOCUMENT NAME			† Y	FILE TYPE	
			No data to d	isplay	

Messaging

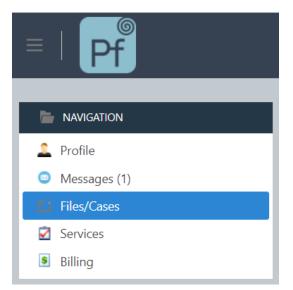


Any time First Sun EAP sends you a new message, you can view it in **Messages** in addition to your personal email.

Messages						C Text to search		
	SUBJECT	Y	DATE		† 7	STATUS		Y
<u>Delete</u>	Welcome To Your PROVIDERfiles		11/13/2018					
	\rangle						20	•



Files/Cases



After signing in, click on **Files/Cases** to see your referral opportunities pending, open files, and closed files (Read only).

Referral Opportunities Pending

For **Private Practitioners** and **Group Practice** office administrators to view a new opportunity, click **View** from the **Referrals Opportunities Pending** grid.

Files/Ca	ases								
₫R	eferral Oppo	rtunities Pend	ing						
		DATE RECEIVED	Y	AUTH #	† Y	EAP	Y	SESSIONS AUTHORIZED	Y
►	View	9/17/2019			39	Demo Full F	PF2020		6

To **Accept** or **Reject** an authorization, click on the corresponding button. If you choose to accept the authorization, the client will show up in your **Open Files.** If you reject the authorization, First Sun EAP will be notified, and the authorization will be removed from the grid.



ORGANIZATION NAME: AMC Motors	SESSIONS AUTHORIZED: 6	
CASE STATUS: New User	HOURLY RATE: \$70.00	
ACTIVITY TYPE: N/A	EAP ORGANIZATION NAME: Demo Full PF2020	
PRIMARY PRESENTING PROBLEM: Stress SECONDARY PRESENTING PROBLEM:	EAP CONTACT NAME: EAP CONTACT PHONE: EAP CONTACT EMAIL:	
NOTES: Prefers evening appointments.	SPECIAL INSTRUCTIONS:	

Group Practices

When a referral is accepted, the group practice office administrator has **3 options** to manage the file:

- 1. Do not assign a counselor to the file. As the office administrator, you will receive information from the counselor and update each file accordingly.
- 2. Assign a counselor from the group practice to the file. Once assigned, you will receive information from the counselor and continue to update each file accordingly.
- 3. Assign a counselor from the group practice to the file. Once assigned, this counselor will be able to view the new authorization in their **Open Files**. The counselor would then proceed to manage the file. For this option to work, the counselor must be preregistered with PROVIDERfiles with their own email address. As the office administrator, you can continue to monitor all files that are assigned to a counselor. The assigned counselor will only see files assigned to them.

To assign a counselor, click on the **Edit** option in the Open Files grid.



d (Open Files						
1	DATE OPENED 👃 🍸	DATE ACCEPTED 🍸	FILE # 🍸	AUTH # 🍸	AUTH END 🍸	FILE TYPE 🍸	CLIENT NAME 🍸
Edit	11/13/2018	11/13/2018	111	38	1/12/2019	Authorization	Barney Rubble
<u>Edit</u>	5/15/2019	5/15/2019	14	15	8/13/2019	Authorization	Bill Bixby
<u>Edit</u>	4/11/2019	4/15/2019	13	14	7/14/2019	Authorization	Billy Smith
<u>Edit</u>	9/19/2019	9/19/2019	77	41	12/18/2019	Authorization	Jane Doe
<u>Edit</u>	2/11/2019	2/11/2019	156	76	4/12/2019	Authorization	Jean Drapeau

Scroll down to the bottom of the Details tab and select the **Assigned Counselor**. Once assigned, click on the **Save** button. The file will transfer to the counselor.

ASSIGNED COL	NSELOR:			
N/A			-	٠

Tip: By hovering over the blue info bubble, you can quickly see the client's clinical information (i.e., presenting problem, sessions remaining, etc.)

Dpen Files

	DATE OPENED ↓ ▼	DATE ACCEPTED 🍸	FILE # 🍸	AUTH # 🍸	AUTH END Y	FILE TYPE Y		ORGANIZATION Y	INFO T
<u>Edit</u>	5/27/2019	5/27/2019	15	16	6/27/2019	Authorization	Kyle Lowrie	AMC Motors	•
<u>Edit</u>	5/15/2019	5/15/2019	14	15	8/13/2019	Authorization	Bill Bixby	AMC Motors	•
<u>Edit</u>	4/11/2019	4/15/2019	13	14	7/14/2019	Authorization	Billy Smith	AMC Motors	
<u>Edit</u>	2/12/2019	2/12/2019	157	77	4/13/2019	Authorization	Tommy Boi	ABC Company	۲
<u>Edit</u>	2/11/2019	2/11/2019	156	76	4/12/2019	Authorization	Jean Drapeau	ABC Company	0
<	1 2 >								



When a client appears in your **Open Files**, you can now enter your sessions, and view/edit their client data. If required, you can print the authorization.

Details includes their personal information (i.e., phone number, address, etc.), as well as their file details like presenting problem.

ony Tan	n - Demo F	ull Pl	F2020			Save	Cancel	Print Authorization
CLIENT:		FILE #	a	AUTH #:		SIONS AUTHORIZED:	SESSI	ON TYPE:
ony Tam		87		56	6		N/A	4
								_
Details	Sessions	Docum	ents / Attachments	Closing Data	Clinical Notes	EAP Details	Case Activity	
FIRST OF	FERED APPOINTMENT	DATE:		I	FIRST APPOINTMENT NOTI	E:		
12/3/2	2019			*	Unable to make the ti	ime offered		
FIRST AP	POINTMENT TIME:				FIRST APPOINTMENT INFO):		
				•	Reason 1			-
REASON	IF DATE OFFERED IS G	REATER T	HAN 5 DAYS:		LAST NAME:*			
N/A				*	Tam			
CONFIRM	IED FIRST CONTACT D	ATE:						
12/3/2	2019			•				
FIRST NA	ME:*							
Tony								
EMAIL AE								
ttam@	eapexpert.com							
ADDRESS	S:							
58 Blo	or Street West, Toro	onto, ON	I, Canada					
ADITAL CTAT	110		DADTNED NAME.			DATE OF		
ARITAL STAT	05:	Q	PARTNER NAME:			DATE OF E		.
1/A		P	Tina				970	•
NDER:		0	PRIMARY LANGUAG	E:		AGE:		
N/A		Q	N/A			▼ 49		
Phone								
ELL NUMBER	he. La		HOME NUMBER:		WORK NUMBER:			
144444444	4		555555555					
K TO LEAVE N	MESSAGE AT CELL?:		OK TO LEAVE MESSA	AGE AT HOME?:	OK TO LEAVE MESS	AGE AT WORK?:		
N/A		*	N/A	Ŧ	N/A		*	
					I L			
File De	tails							
	GANIZATION:				CASE STATUS:			
AMC Moto				Q	New User			
				٢				
	SENTING PROBLEM:	ĸ		_	SECONDARY PRESENT	IING PROBLEM:		
Anxiety				-	Alcohol			



Client prefers evening appointments	
Additional File Details	
LIENT DETAILS QUESTIONSET:	
Question	Response
AUTHORIZATION NOTES:	
Client may bring spouse to first appointment.	
PECIAL INSTRUCTIONS: Prefers evening or weekend appointments.	
ASSIGNED COUNSELOR:	
Jones, Beatrice - bjones@eapexpert.com	*

Sessions will display the number of authorized sessions the client received. Click **Request Additional Sessions** to request more sessions from First Sun EAP. Depending on your EAP, this feature may be disabled.

Details	Sessions	Documents / Attachr	nents	Closing Data	Clinical N	Notes EAP	Details	Case Activity	
sessions 6	AUTHORIZED:		sessions 0	SUBMITTED:		SESSI 6	ONS REMAININ	G:	
		SESSION # 🕇 🍸	DATE 🍸	TIME 🍸	DURATION Y	NO SHOW 🍸	NOTES 🝸	SUBMITTED Y	RESPONSE T
	<u>Edit</u>	1			60				
	<u>Edit</u>	2			60				
	<u>Edit</u>	3			60				
	<u>Edit</u>	4			60				
	Edit	5			60				
	<u>Edit</u>	6			60				
<	1 >								20 -
Req	uest Additional	Sessions							



When you click Edit session, you can enter the session details.

Session Billy Smith - Demo Full PF2020		s	ave	Cancel
DATE: 5/27/2019	TIME: 13:00:00	DURATION (MINUTES): 60		*
Non Attendance No Show / Late Cancellation Cancellation				
Notes				
EAP Response				

The **Documents/Attachments** tab will hold all documents (i.e., The Statement of Understanding). Once signed by the client, this document may be uploaded to PROVIDERfiles.

Click **New** to attach a document.

uthorization ony Tam	ı - Demo	Full PF2020				Save	Cancel		Print Authorization
CLIENT: Tony Tam		FILE #: 87	AUTH #: 56			sessions authoriz 6	ED: 5	session N/A	TYPE:
Details	Sessions	Documents / Attachments	Closing Data	Clinica	l Notes	EAP Details	Case Activi	ty	
New 🔶									×
DOC	UMENT NAME			† Y	FILE TYPE		Y	FILE	Y
			No data	a to displa	У				

Click **Browse** to locate and attach a document. Additional information for the attached file can be entered in **Document Name** and **File Type.**



FILE:*		
	Browse	

Click **Browse** to locate the file.

Click **OK** to confirm your selection and return to the previous screen.

Document	\longrightarrow	ОК	Cancel
FILE:* COI - evidence of insurance.pdf 🔗			
DOCUMENT NAME:			
Insurance			
FILE TYPE:			
PDF			

In the **Closing Data** tab, fill out all of the required information to close a client's file.

CLOSING	INSTRUCTIONS (F	FROM EAP, IF ANY):					
BEFOR	E CLOSING YOU	JR FILE:1. Ensure you have entere	ed your notes2. Sub	omitted your complet	ted sessions3. Ente	ered all Closing Details	s
CLOSING	RECOMMENDATI	ON:					
N/A							
RESOLUT	10N:						
N/A							
OUTCOM	IE IN WORKPLACE						
N/A	sessed Probler						
N/A Ass	sessed Probler						
N/A Ass PRIMARY	sessed Probler			SECONDARY:			
N/A Ass	sessed Probler		٩	secondary:			
N/A Ass PRIMARY N/A	sessed Probler						
N/A Ass PRIMARY N/A	sessed Probler						
N/A Ass PRIMARY N/A Clo	sessed Probler : osing Notes						
N/A Ass PRIMARY N/A Clo	sessed Probler : osing Notes DATE:	ns					
N/A Ass PRIMARY N/A Clo	sessed Probler : osing Notes	ns					

You will be able to find your client's **EAP Details** in the last tab in cases where you need to contact First Sun EAP.



Details	Sessions	Documents / Attachments	Closing Data	Clinical Notes	EAP Details		
Ma	in Contact			Billing Contac	t		
REFERRIN Demo Fu	G EAP:* J II PF2020			BILLING CONTACT:			
REFERRIN	G EAP ADDRESS:		BILLING CONTACT EMAIL:				
REFERRIN	g eap contact i	NAME:	BILLING CONTACT FAX:				
REFERRIN	g eap contact e	EMAIL:		BILLING CONTACT PHO	DNE:		
REFERRIN	g eap contact f	PHONE:					
REFERRIN	G EAP CONTACT I	AX:					

Case Activity allows you to add administrative activities such as follow up calls.

Click **New** to add an activity.

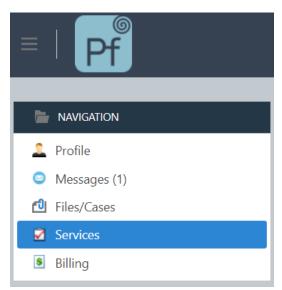
Details	Sessions	Docur	nents / Attac	:hments	Closing Data	Clinical Note	s EAP Details	Case Activity		
New ┥		-								ß
	DATE	Y	TIME	Y	DURATION	Y	ACTIVITY TYPE	Y	NOTES	Ŷ
					No da	ta to display				

Click **OK** to save the information.

Case Activity			OK Cancel
DATE:		ACTIVITY TYPE:	
3/17/2020	-	Case Management	÷ 👌
TIME:		DURATION:	
	*	30	* *
NOTES			



Services



After signing in, click on **Services** to view your services opportunities pending, open services, and closed services (Read only).



Services Opportunities Pending

As with Files/Cases, this grid will allow you to accept or reject a service referral. This may include services such trainings, orientations, workshops and critical incidents.

Open Services

This grid allows you to enter all required information regarding the service.

Closed Services

Once closed, a service will be accessible in read only format in this grid.

Services													
Services	Opportur	nities Pending											
	DATE RECEIVED		T EAP COMPAN		Y NUMBER		NUMBER	Y		SERVICE TYPE			Y
					No data to display								
☑Open Services													
	SERVICE DATE		SERVICE TYPE	SERVICE TYPE The EMP		MPLOYEE ORGANIZATION		Y	ADDRESS	EAP COMPANY		OMPANY	Y
No data to display													
☑Closed S	Services										Las	t 30 Days	•
SERVICE DATE	Y	SERVICE TYPE	Υ EM	MPLOYEE ORGANIZA	TION Y	A	DDRESS	Y	EAP COMPAN	IY	Y	PROVIDER	Y
	No data to display												

Billing



≡	Pf
	NAVIGATION
1	Profile
0	Messages (1)
1	Files/Cases
2	Services
S	Billing

After signing in, click on **Billing** where you will see your submitted and process claims.

Submitted Claims

All submitted sessions not processed by First Sun EAP will appear in this grid.

Processed Claims

Claims processed by First Sun EAP for payment will appear in this grid.

Billing											
SUBMITTED CLAIMS											
FILE TYPE	Y	CLIENT FILE			AUTHORIZ	\mathbb{Y}	DATE SUBMITTED				
Authorization		Tony Ta	am - Demo Full PF2020	emo Full PF2020			Tony Tam - Demo Full PF2020				
Authorization		Tony Ta	am - Demo Full PF2020	Tony Tam - Demo Full PF2020					1/10/2020		
Authorization	on Mike Dunn - Demo FEI PF2020				Mike Dunn - Demo FEI PF2020					12/30/2019	
Authorization		Tony Tam - Demo Full PF2020			Tony Tam - Demo Full PF2020					12/27/2019	
Authorization		Mike D	unn - Demo FEI PF2020		Mike Dunn - Demo FEI PF2020					12/27/2019	
PROCESSED CLAIMS											
FILE TYPE Y	INVOI	OICE # ♥ DATE PROCESSED ↓ ♥ SE		SESSION AMOUNT		DURATION Y	DATE T		SESSION NUMBER 🍸		
Authorization		13	3 1/14/2020		\$100.00 60		12/13/2019			1	
Authorization		15 12/20/2019			\$50.00 45		12/2/2019			2	



Logging Off

To log off, click on the image in the top right corner of the screen and select Log Off.



