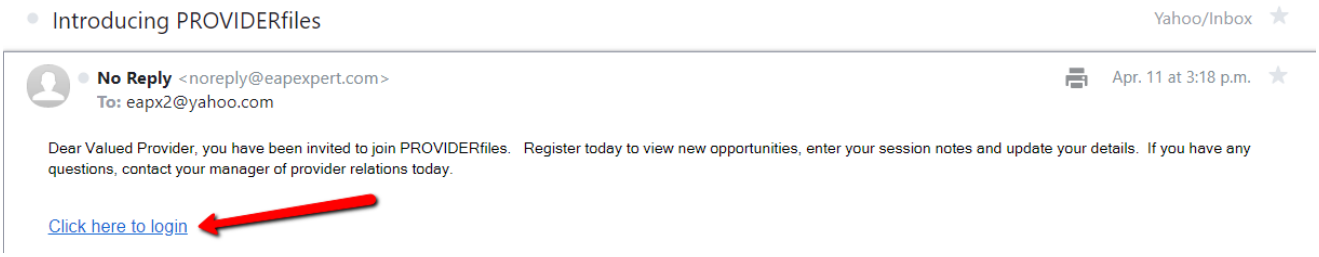
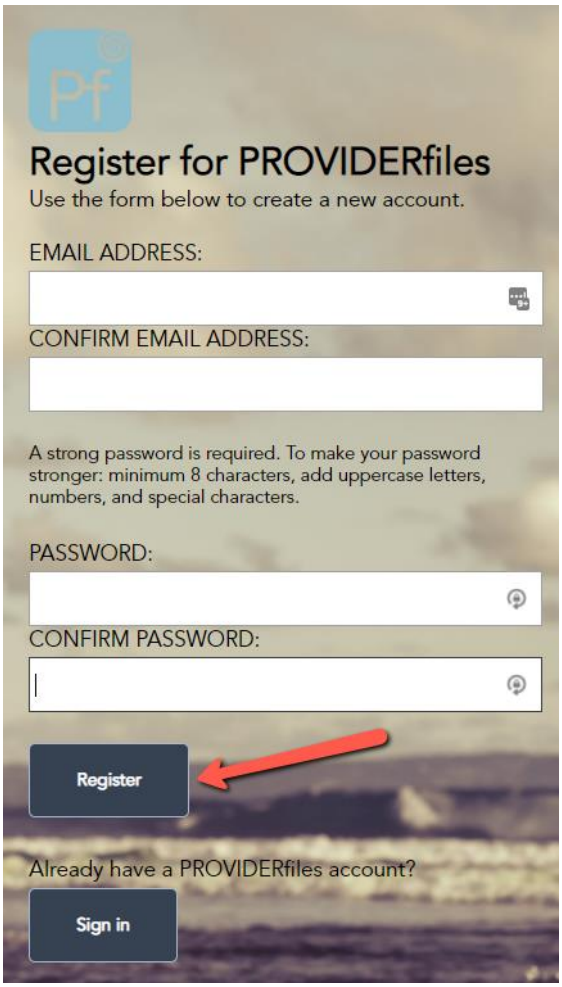
PROVIDERfiles
Provider's User Guide for

Getting Started

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

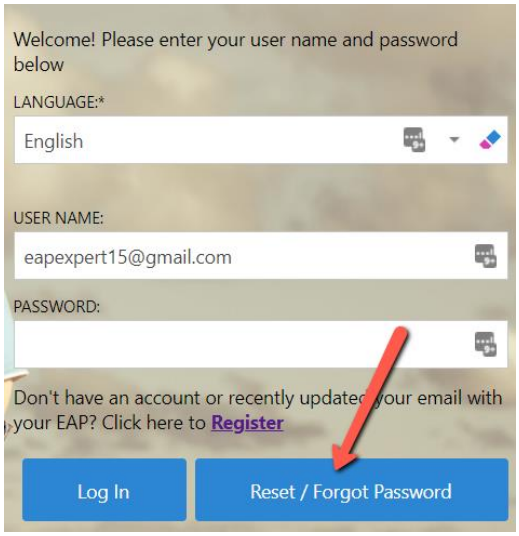


To register, you must enter the same email address found in your emailed invitation as this is your username. Immediately after clicking **Register,** you will be able to sign in.



Forgot Password?

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

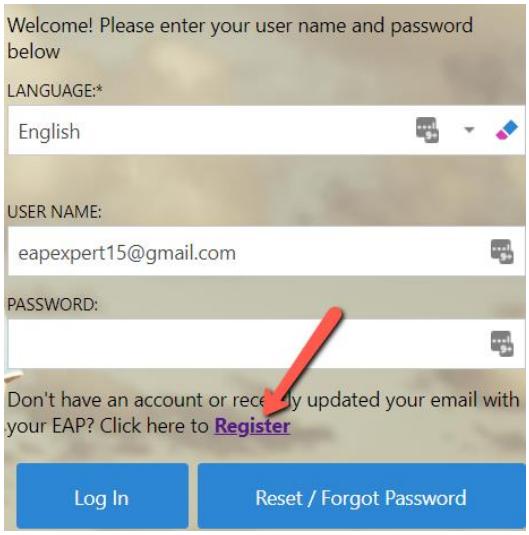


Already Registered?

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?

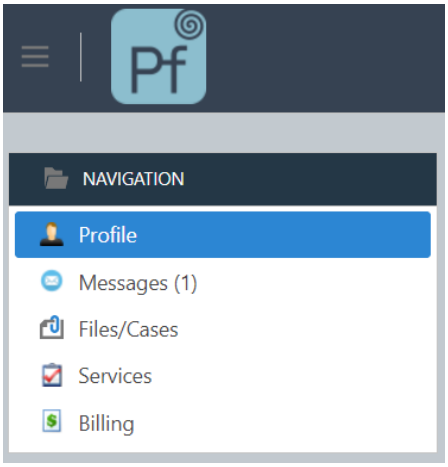
If you have a new email address, please notify First Sun EAP. They will update your profile information in their software. Once completed, click on the **Register** link and access your Pf information using the new email address.



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).

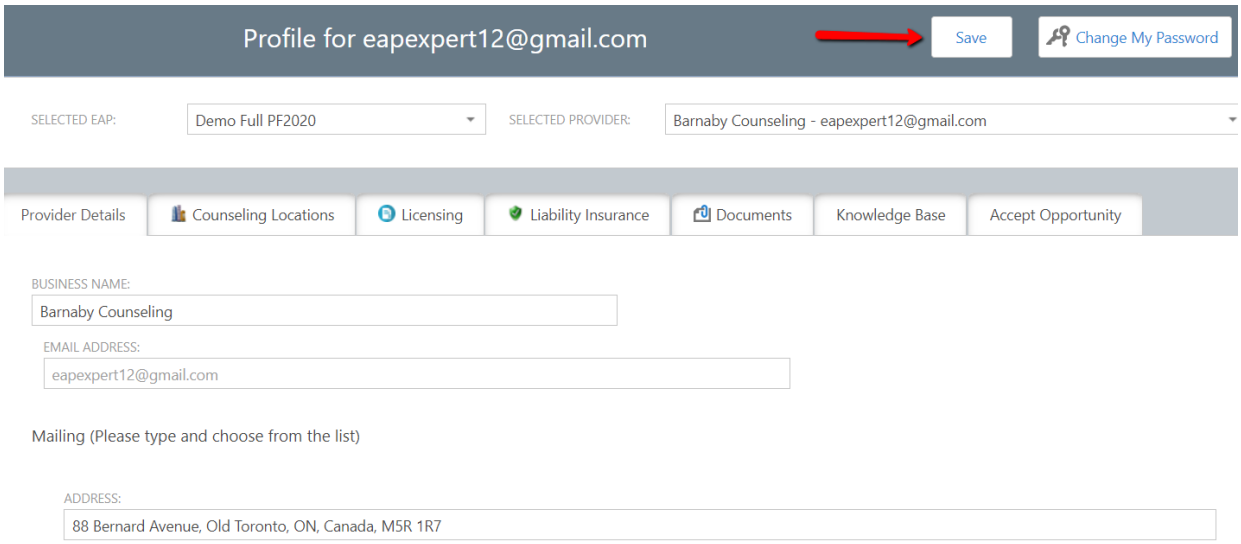
Provider Profile

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.***

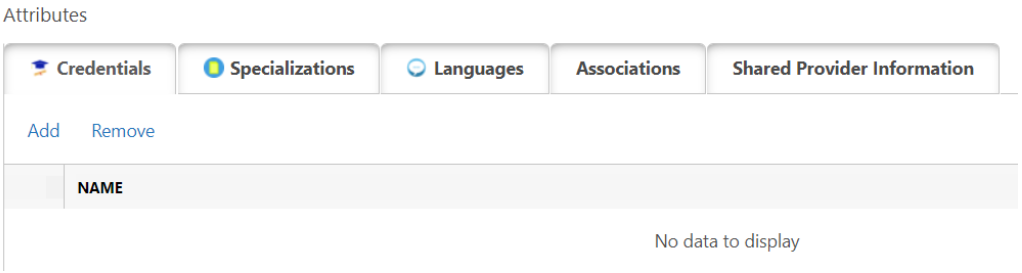


After signing in, click on **Profile** in the Navigation window. Here you will see your Details, Counseling Locations, Licensing, Liability Insurance, Documents and Knowledge Base.

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

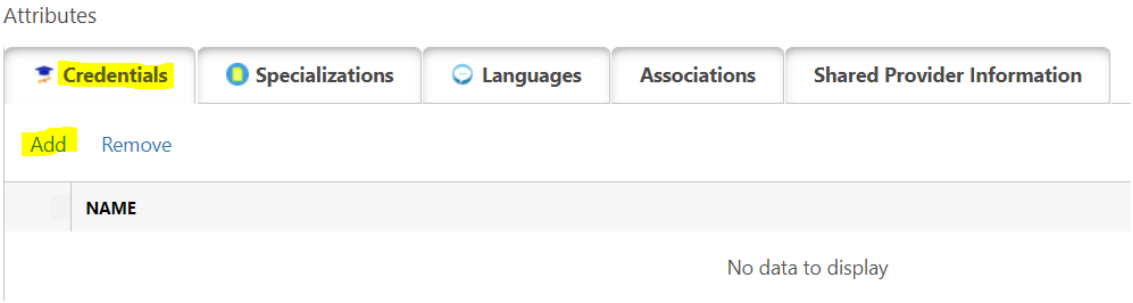


At the bottom of the screen, you will find the following under **Attributes**.

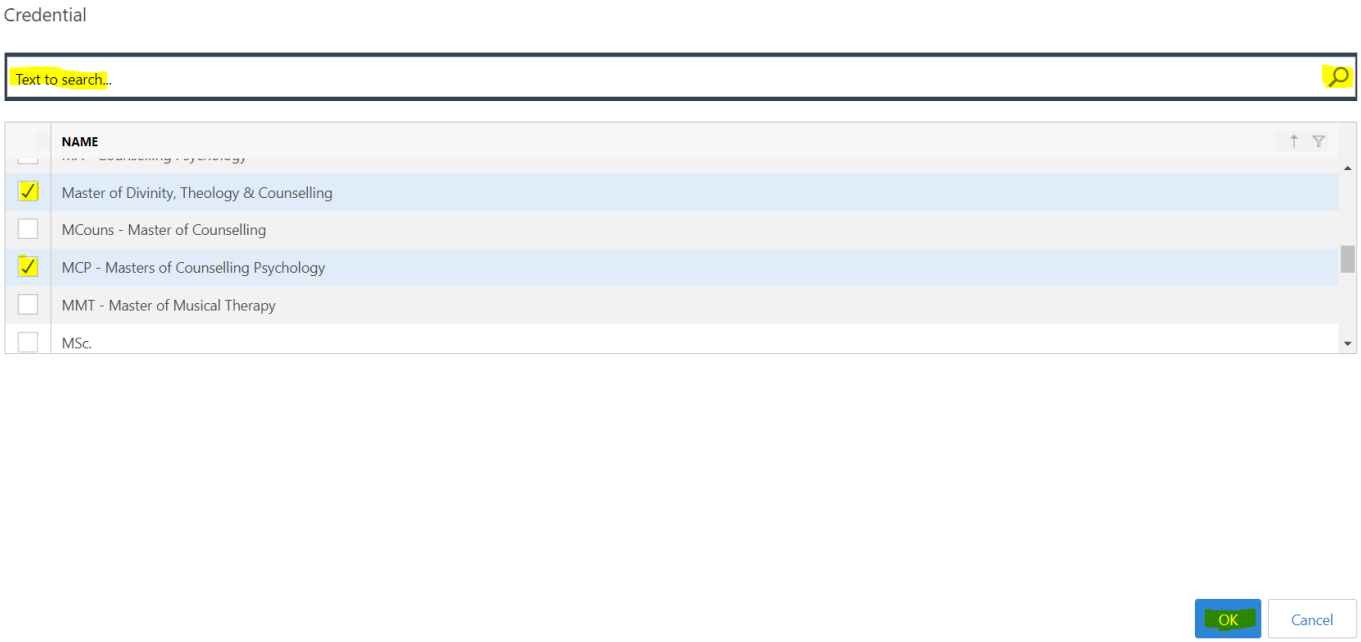


Credentials

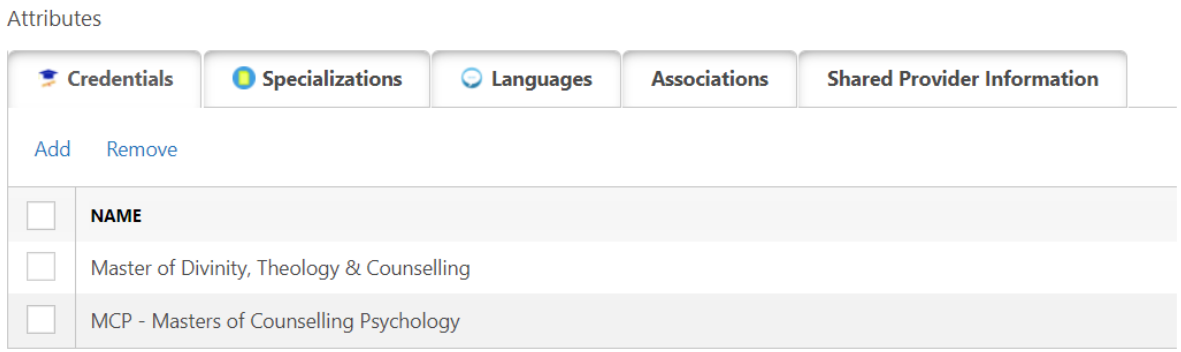
Click **Add** to update and add a new credential.



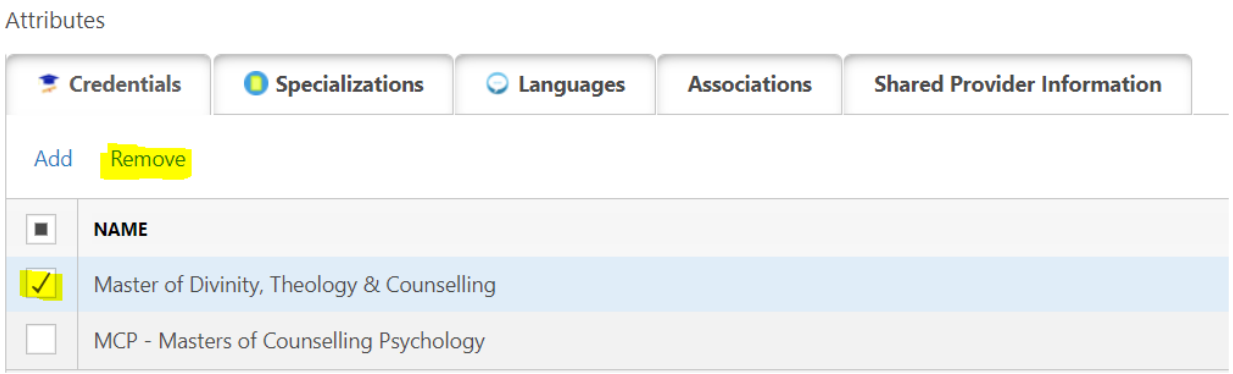
To display the available credentials, enter specific text to search and click on the magnifying glass to the right to display the selection(s). Check the selection box and then the information below. Click **OK** to save and return to the previous page.



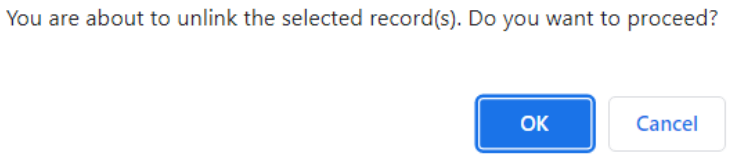
The credentials selected are displayed in the grid.



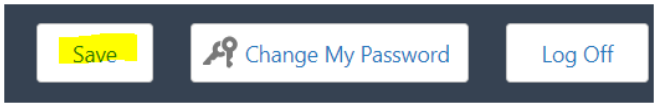
To remove a credential, check the box to the left and then click on **Remove**.



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.

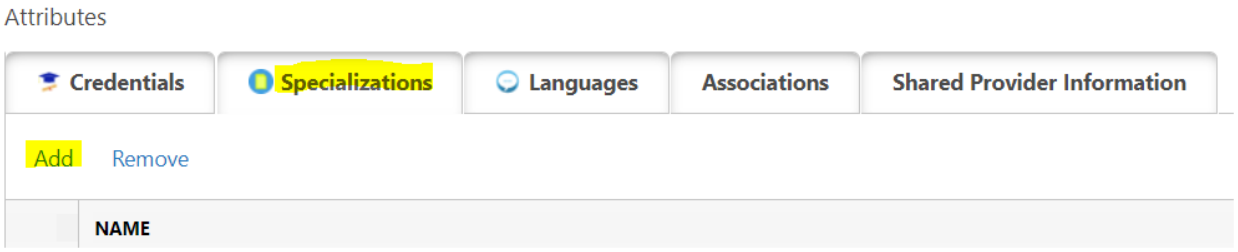


Please make sure to click **Save** at the top of your screen after making any changes/additions to your profile.

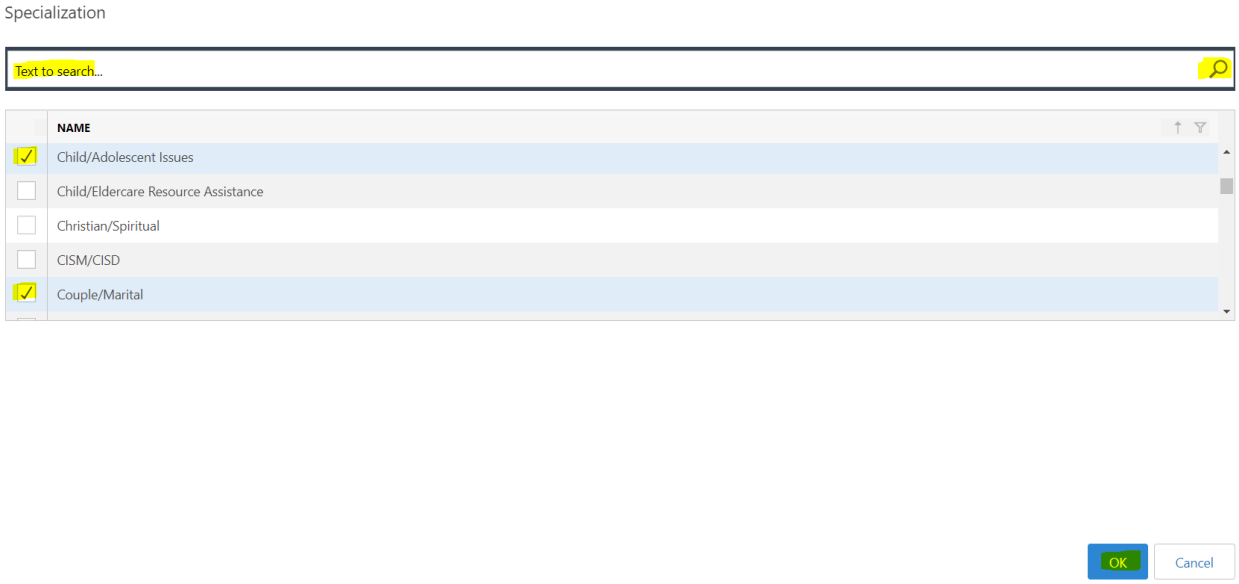


Specializations

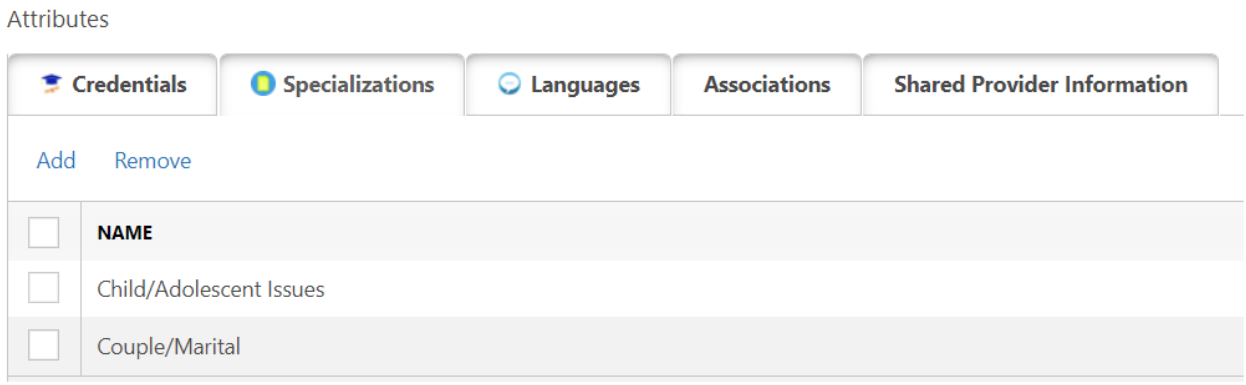
Click **Add** to update a new specialization.



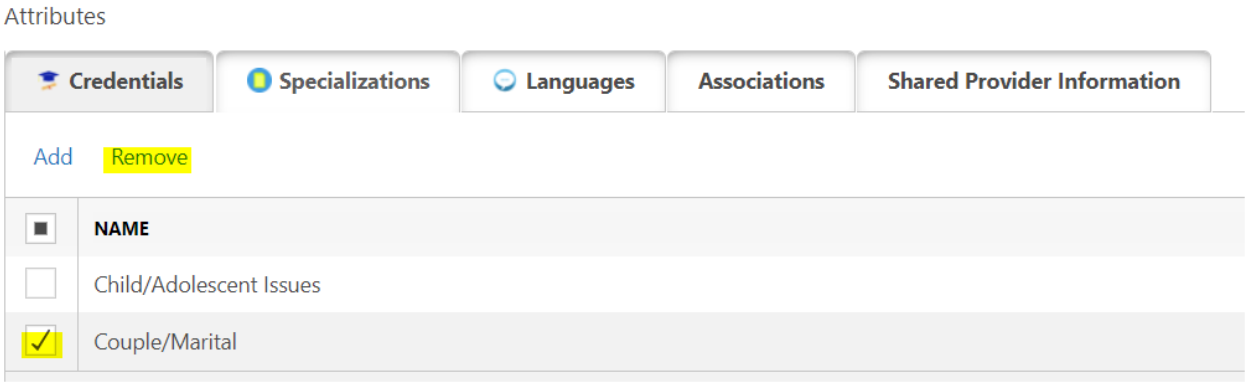
To display the available specializations, enter specific text to search or click on the magnifying glass to the right to display all the specializations available for selection. Check the box for each one and then the information below. Click **OK** to save and return to the previous page.



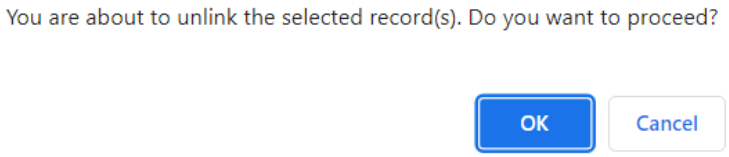
The specializations selected are displayed in the grid.



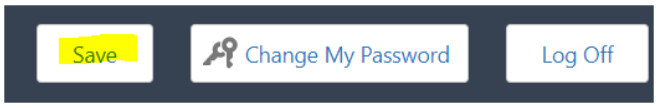
To remove a specialization, check the box to the left and then click on **Remove**.



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.

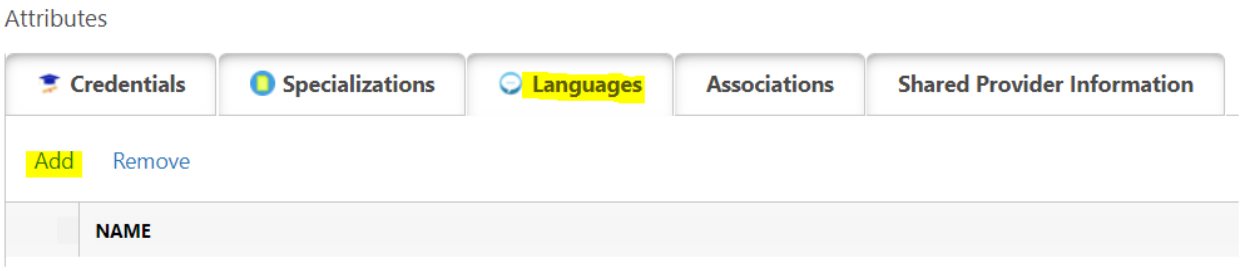


Please make sure to click **Save** at the top of your screen after making any changes/additions to your profile.

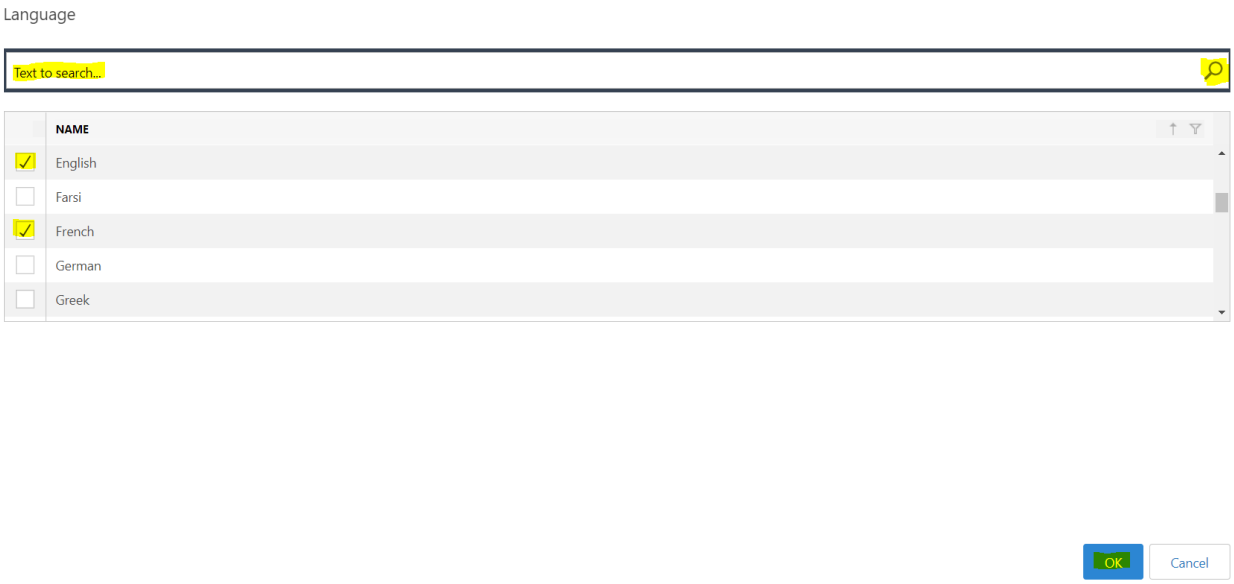


Languages

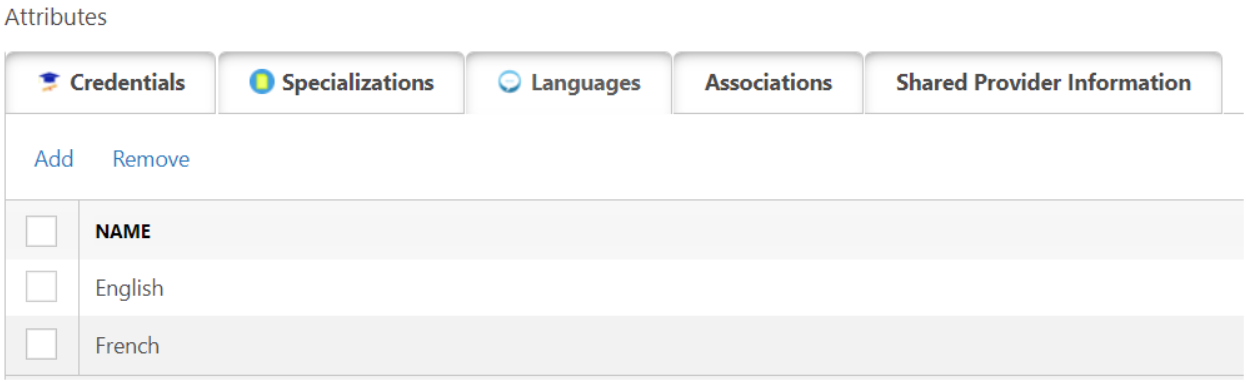
Click **Add** to update a new language.



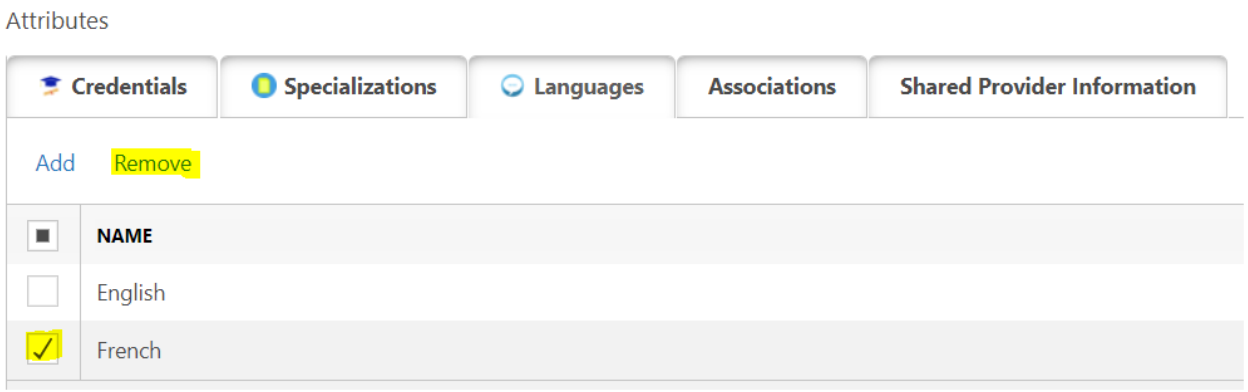
To display the available languages, enter specific text to search or click on the magnifying glass to the right to display all the languages available for selection. Check the box for each one and then the information below and click **OK** to save and return to the previous page.



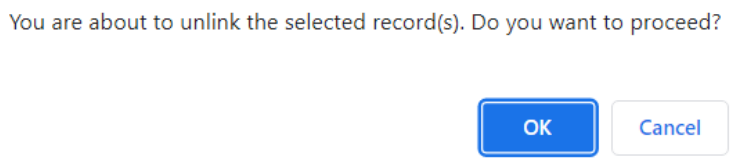
The languages selected are displayed in the grid.



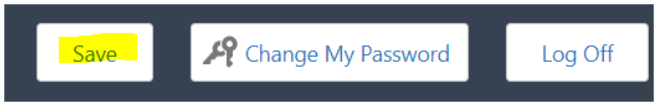
To remove a language, check the box to the left and then click on **Remove**.



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.

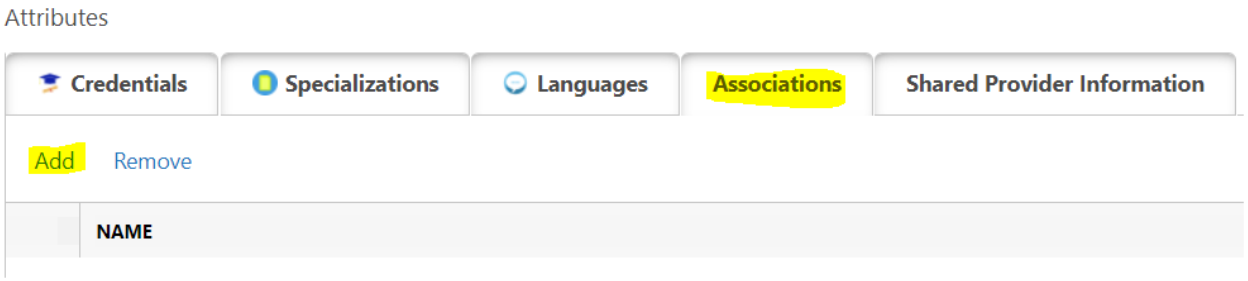


Please make sure to click **Save** at the top of your screen after making any changes/additions to your profile.

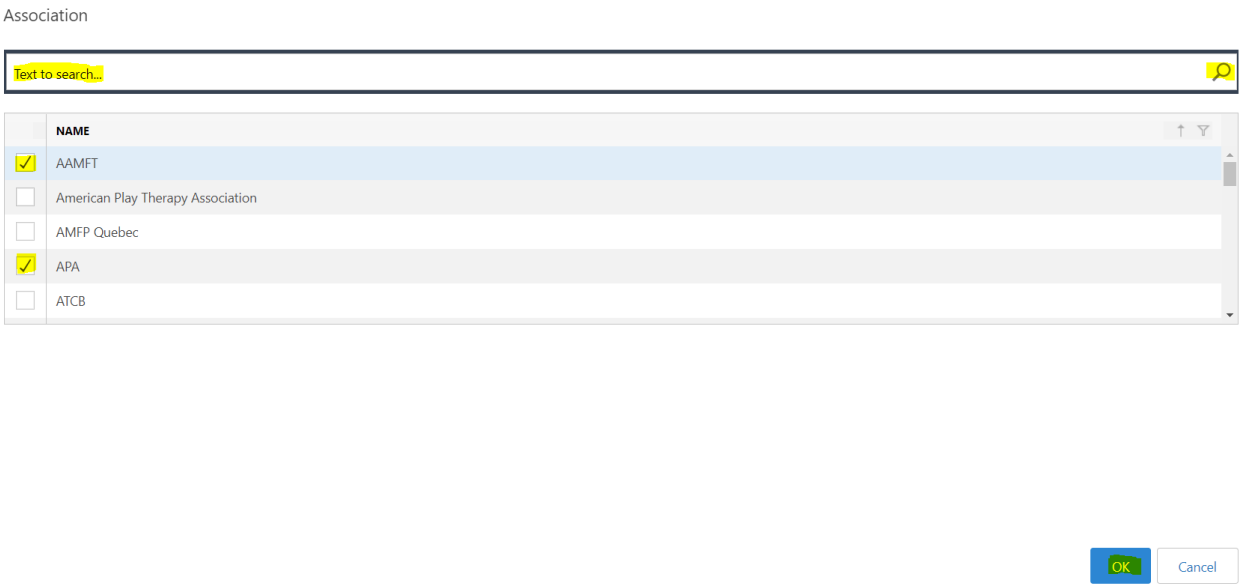


Associations

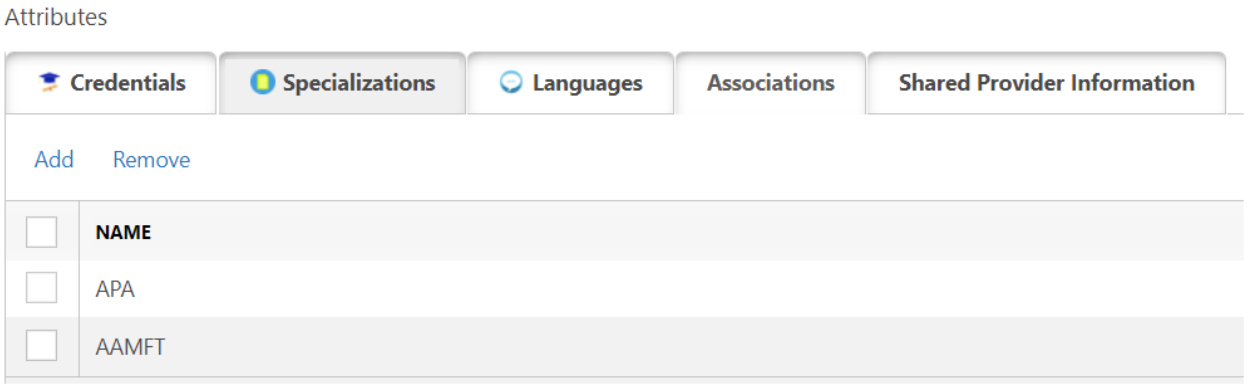
Click **Add** to update a new association.



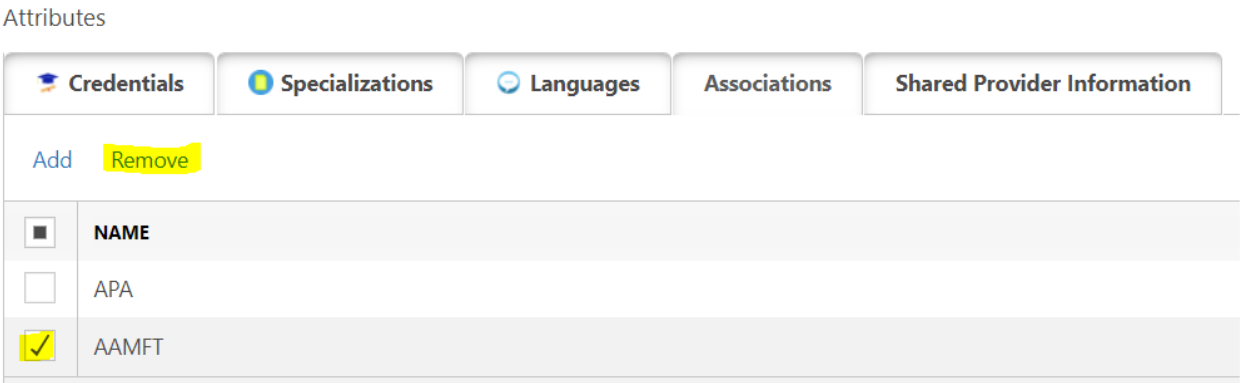
To display the available associations, enter specific text to search or click on the magnifying glass to the right to display all the associations available for selection. Check the box for each one and then the information below and click **OK** to save and return to previous page.



The associations selected are displayed in the grid.



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



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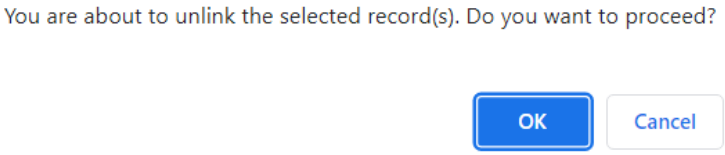
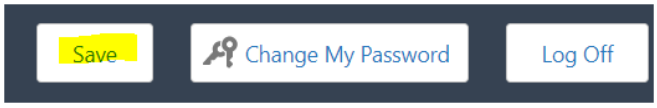


Please make sure to click **Save** at the top of your screen after making any changes/additions to your profile.



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 | Specializations | Languages | Associations | Shared Provider Information

PROFILE IMAGE:

Browse...

PERSONAL STATEMENT:

UNAVAILABLE DATE START:

UNAVAILABLE DATE END:

UNAVAILABILITY HISTORIES:

CREATED ON	UNAVAILABLE DATE START	UNAVAILABLE DATE END
6/9/2021		
6/2/2021	6/14/2021	7/3/2021

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

Save | Change My Password | Log Off

Counseling Locations include all locations where you offer counseling.

Profile for eapexpert12@gmail.com | Save | Change My Password | ...

SELECTED EAP: Demo Full PF2020 SELECTED PROVIDER: Barnaby Counseling - eapexpert12@gmail.com

Provider Details | Counseling Locations | Licensing | Liability Insurance | Documents | Knowledge Base | Accept Opportunity

New Office Location Remove Selected

NAME	ADDRESS	PHONE	CONTACT PERSON
Georgetown Office	2 Draper St, Georgetown, ON, CA, L7G 3C9	555566565533	Kevin
Barnaby Counseling - Bernard Ave	88 Bernard Avenue, Old Toronto, ON, Canada, M5R 1R7	4444444444	Tom Jones

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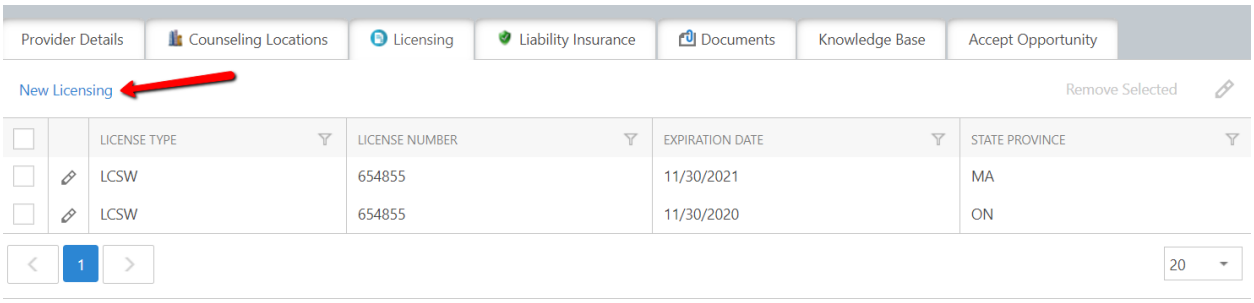
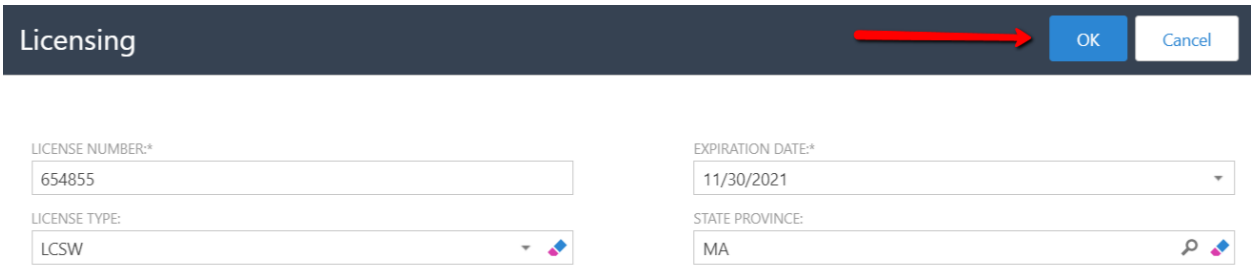
The **Licensing and Liability Insurance** tabs are where you keep your credentials current.

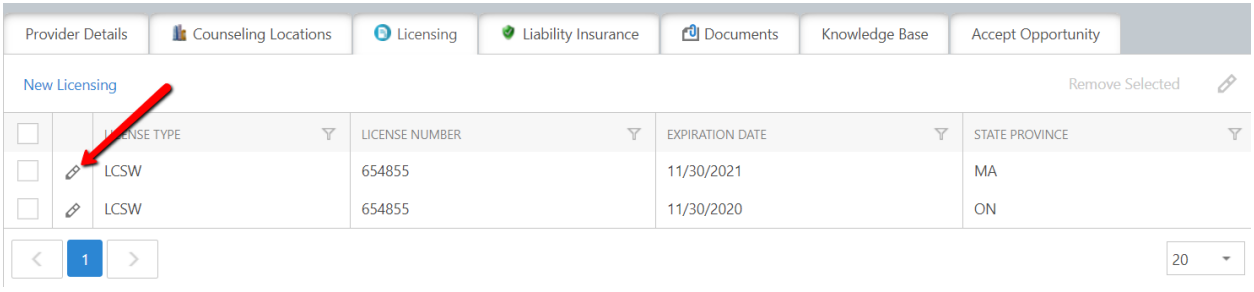
Click **New Licensing** to add your licensure information.



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

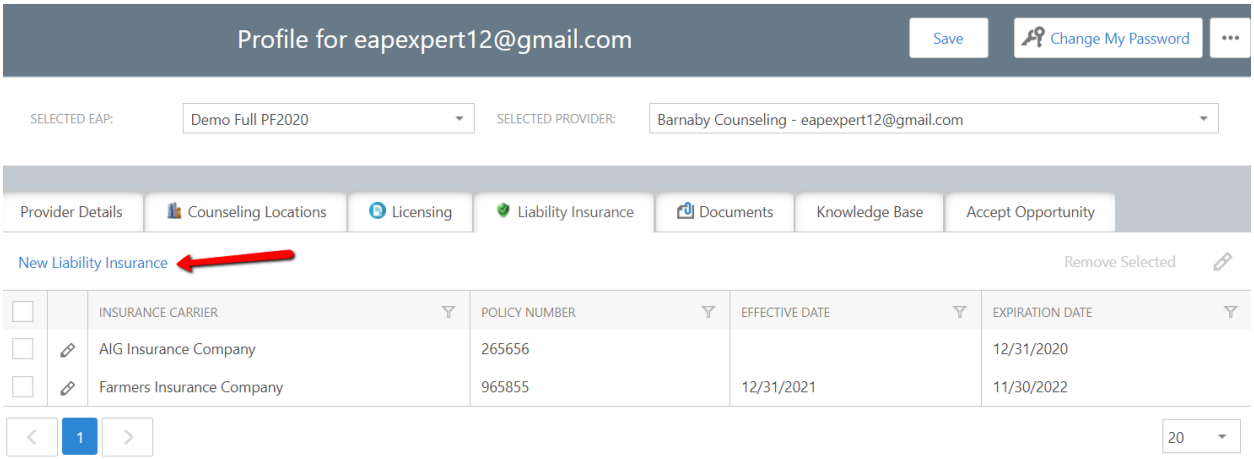


To edit an existing license, click the **EDIT** symbol.

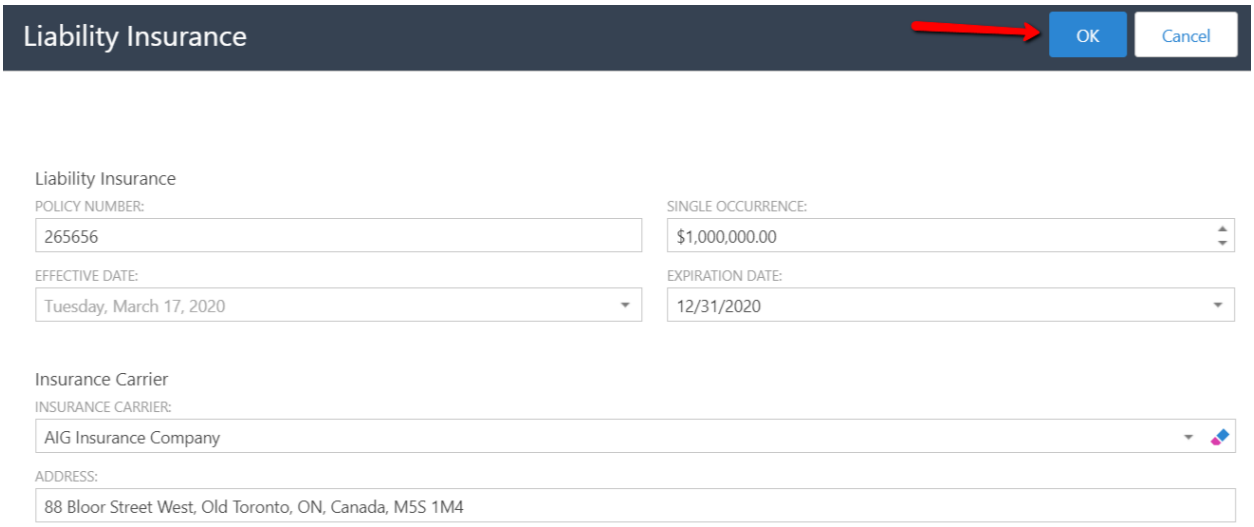


Liability Insurance

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



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



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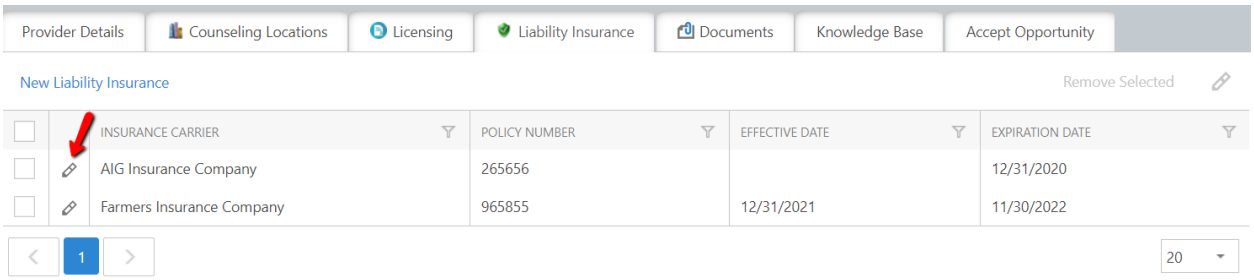
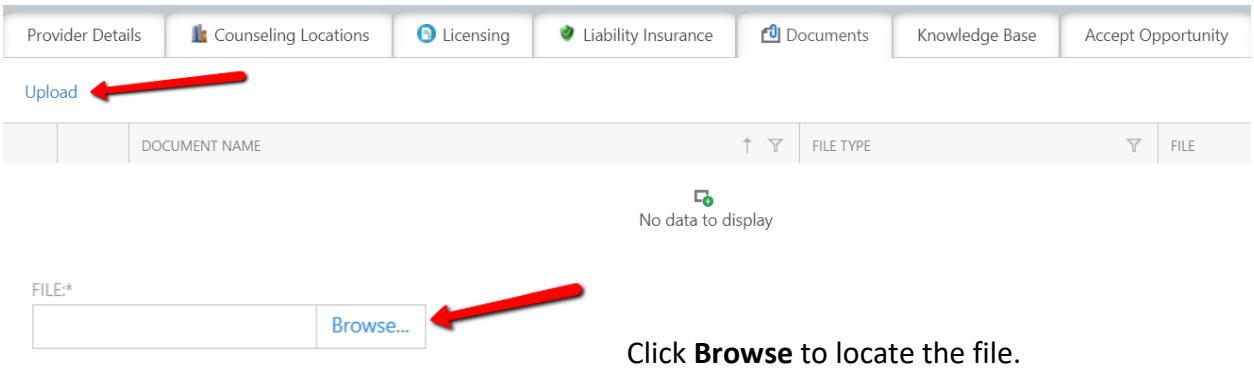
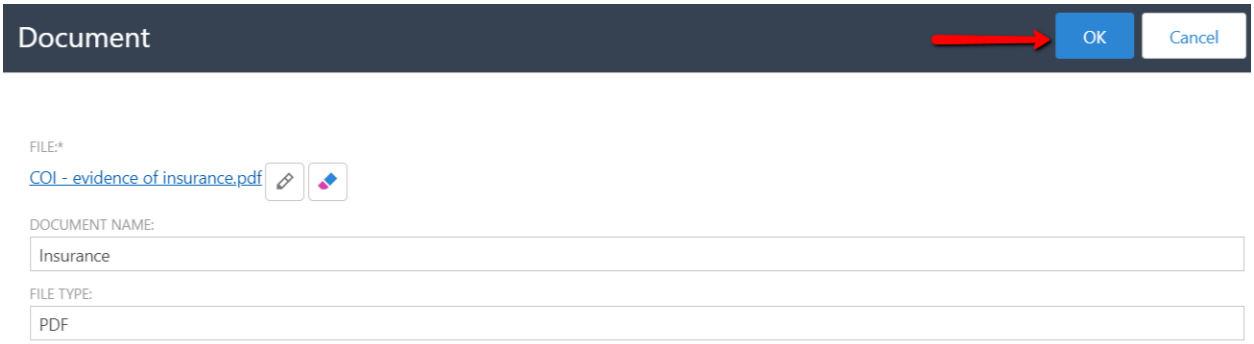


The **Documents** tab allows you to upload documents pertaining to you as a provider. They become your profile for First Sun EAPs. To upload a document, click on **Upload** and follow the prompts.

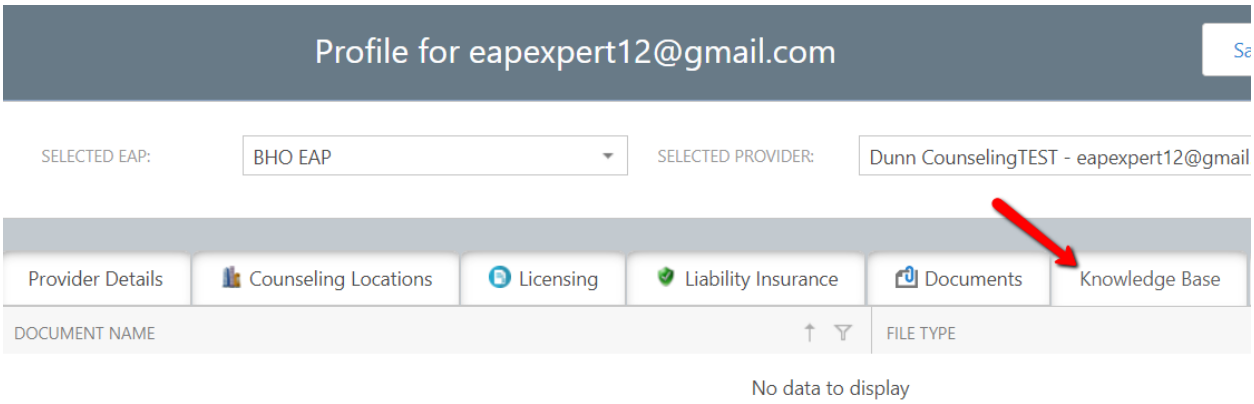


Click **Browse** to locate the file.

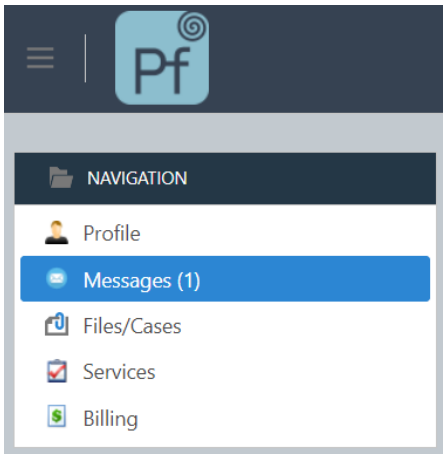
Click **OK** to confirm your selection and return to the previous screen.



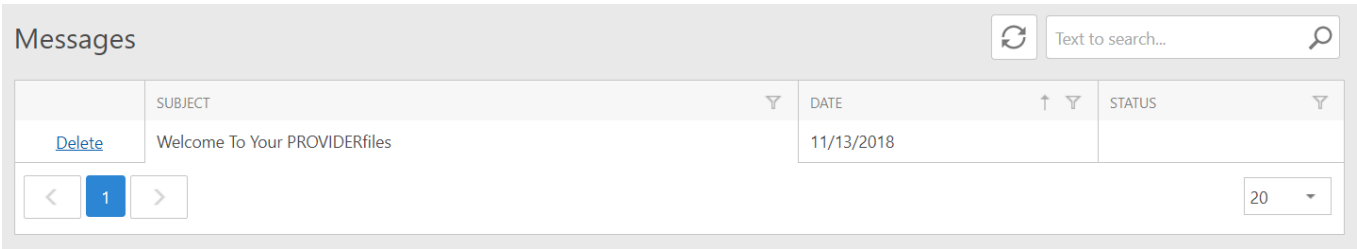
The **Knowledge Base** tab allows you to read and download documents sent to you by First Sun EAP. This may include their policies and procedures or other important information.



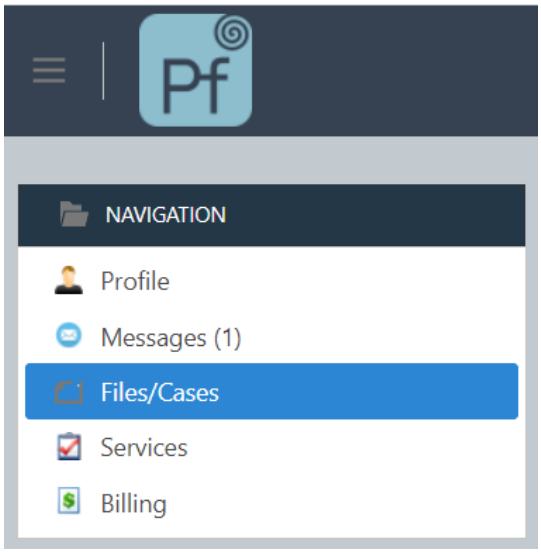
Messaging



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



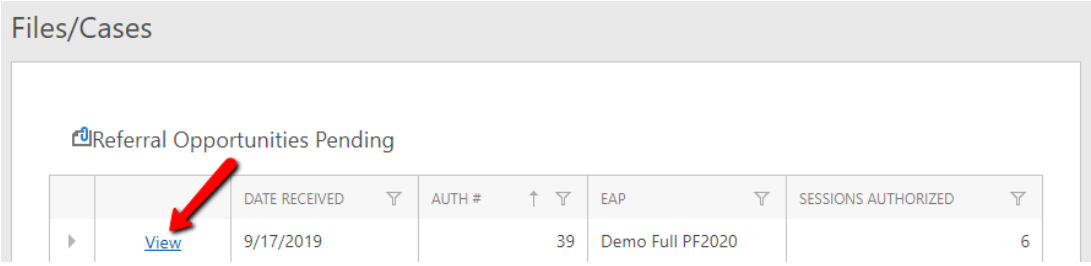
Files/Cases



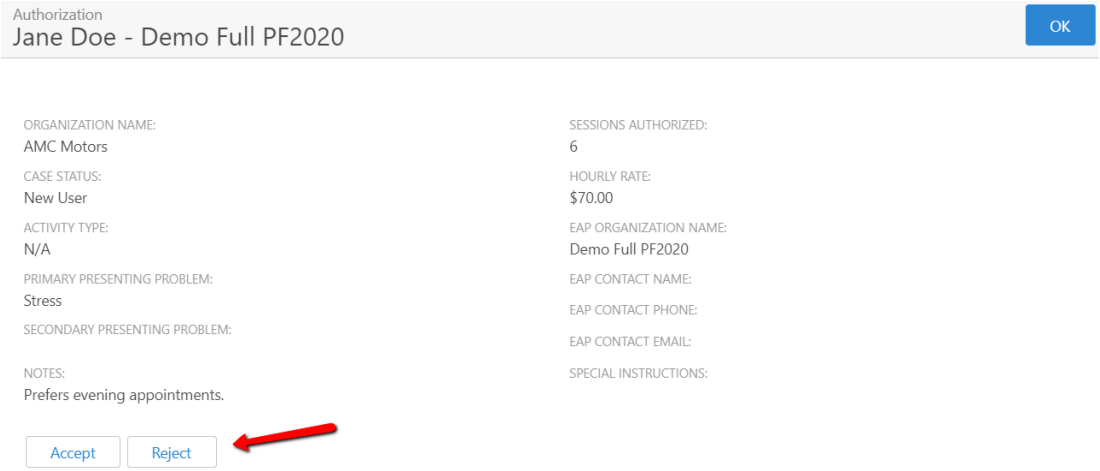
After signing in, click on **Files/Cases** to see your referral opportunities pending, open files, and closed files (Read only).

Referral Opportunities Pending

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



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.



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.

Open Files

	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
Edit	5/15/2019	5/15/2019	14	15	8/13/2019	Authorization	Bill Bixby
Edit	4/11/2019	4/15/2019	13	14	7/14/2019	Authorization	Billy Smith
Edit	9/19/2019	9/19/2019	77	41	12/18/2019	Authorization	Jane Doe
Edit	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 COUNSELOR:

N/A

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

Open Files

	DATE OPENED	DATE ACCEPTED	FILE #	AUTH #	AUTH END	FILE TYPE	CLIENT NAME	ORGANIZATION	INFO
Edit	5/27/2019	5/27/2019	15	16	6/27/2019	Authorization	Kyle Lowrie	AMC Motors	
Edit	5/15/2019	5/15/2019	14	15	8/13/2019	Authorization	Bill Bixby	AMC Motors	
Edit	4/11/2019	4/15/2019	13	14	7/14/2019	Authorization	Billy Smith	AMC Motors	
Edit	2/12/2019	2/12/2019	157	77	4/13/2019	Authorization	Tommy Boi	ABC Company	
Edit	2/11/2019	2/11/2019	156	76	4/12/2019	Authorization	Jean Drapeau	ABC Company	

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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.

Authorization
Tony Tam - Demo Full PF2020

Save | Cancel | Print Authorization

CLIENT:	FILE #:	AUTH #:	SESSIONS AUTHORIZED:	SESSION TYPE:
Tony Tam	87	56	6	N/A

Details | Sessions | Documents / Attachments | Closing Data | Clinical Notes | EAP Details | Case Activity

FIRST OFFERED APPOINTMENT DATE: 12/3/2019
FIRST APPOINTMENT NOTE: Unable to make the time offered
FIRST APPOINTMENT TIME:
FIRST APPOINTMENT INFO: Reason 1
REASON IF DATE OFFERED IS GREATER THAN 5 DAYS: N/A
LAST NAME:* Tam
CONFIRMED FIRST CONTACT DATE: 12/3/2019
FIRST NAME:* Tony
EMAIL ADDRESS:* ttam@eapexpert.com
ADDRESS: 58 Bloor Street West, Toronto, ON, Canada

MARITAL STATUS: N/A
PARTNER NAME: Tina
DATE OF BIRTH: 12/7/1970
GENDER: N/A
PRIMARY LANGUAGE: N/A
AGE: 49

Phone

CELL NUMBER: 4444444444
HOME NUMBER: 5555555555
WORK NUMBER:
OK TO LEAVE MESSAGE AT CELL?: N/A
OK TO LEAVE MESSAGE AT HOME?: N/A
OK TO LEAVE MESSAGE AT WORK?: N/A

File Details

EMPLOYEE ORGANIZATION: AMC Motors
CASE STATUS: New User
PRIMARY PRESENTING PROBLEM:* Anxiety
SECONDARY PRESENTING PROBLEM: Alcohol

INTAKE NOTES:

Client prefers evening appointments

Additional File Details

CLIENT DETAILS QUESTIONSET:

Question	Response

AUTHORIZATION NOTES:

Client may bring spouse to first appointment.

SPECIAL 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 / Attachments | Closing Data | Clinical Notes | EAP Details | Case Activity

SESSIONS AUTHORIZED: 6

SESSIONS SUBMITTED: 0

SESSIONS REMAINING: 6

		SESSION #	DATE	TIME	DURATION	NO SHOW	NOTES	SUBMITTED	RESPONSE
	Edit	1			60				
	Edit	2			60				
	Edit	3			60				
	Edit	4			60				
	Edit	5			60				
	Edit	6			60				

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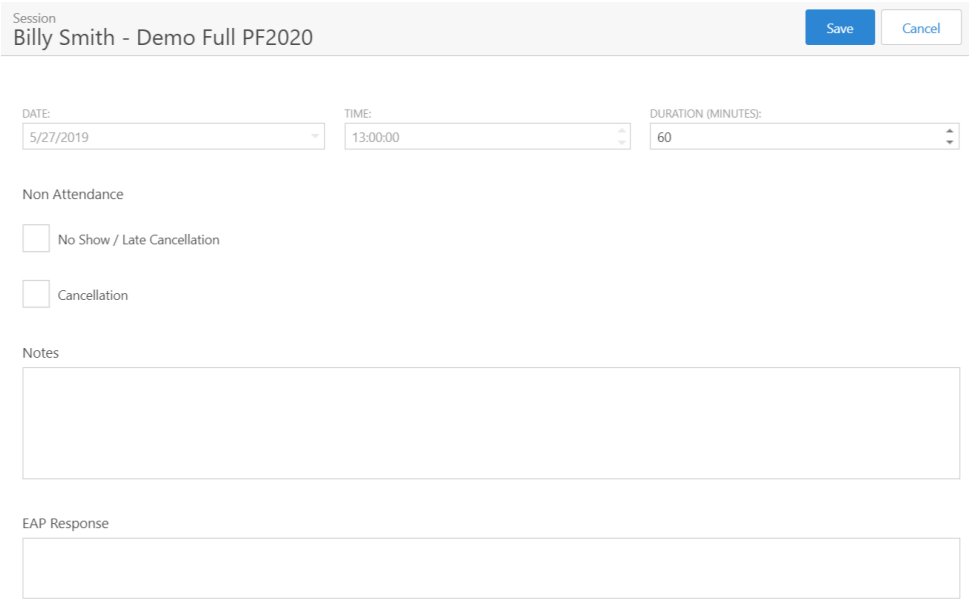
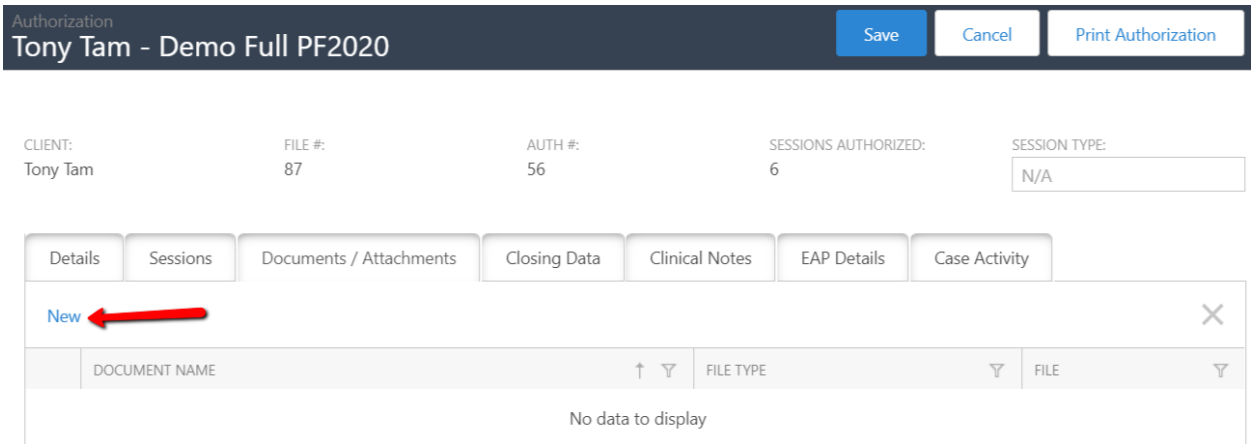
Request Additional Sessions

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

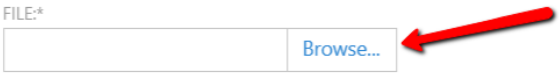


The **Documents/Attachments** tab will hold all documents (i.e., The Statement of Understanding). Once signed by the client, this document may be uploaded to PROVIDERfiles.

Click **New** to attach a document.

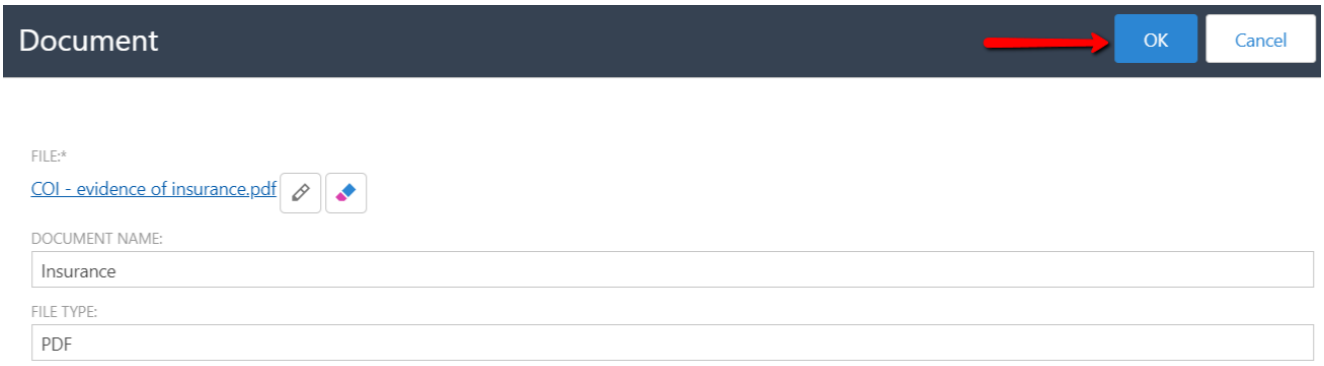


Click **Browse** to locate and attach a document. Additional information for the attached file can be entered in **Document Name** and **File Type.**

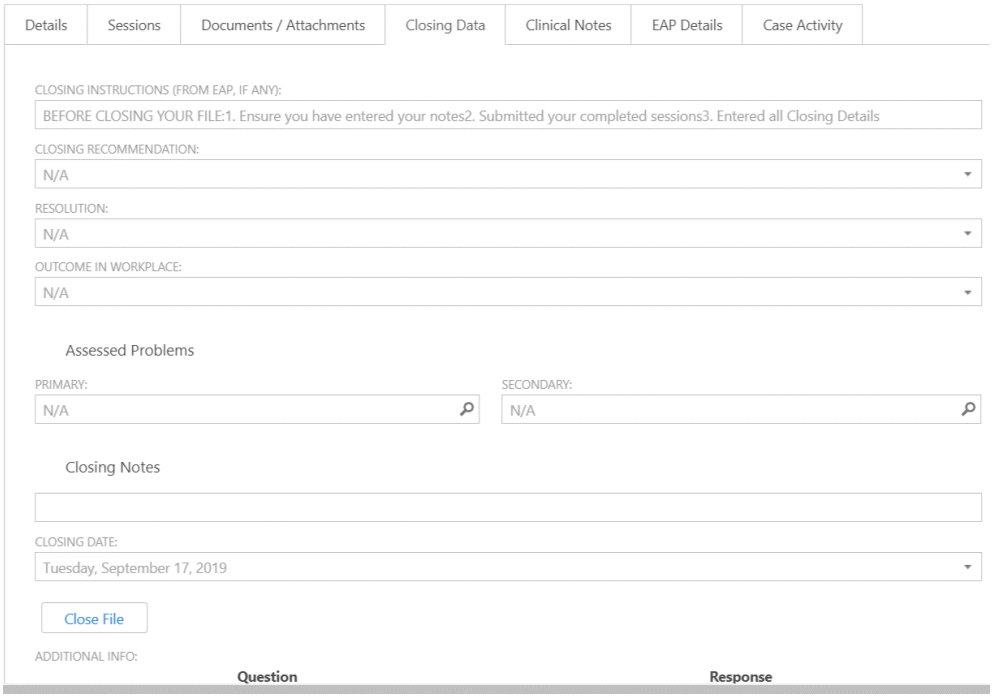


Click **Browse** to locate the file.

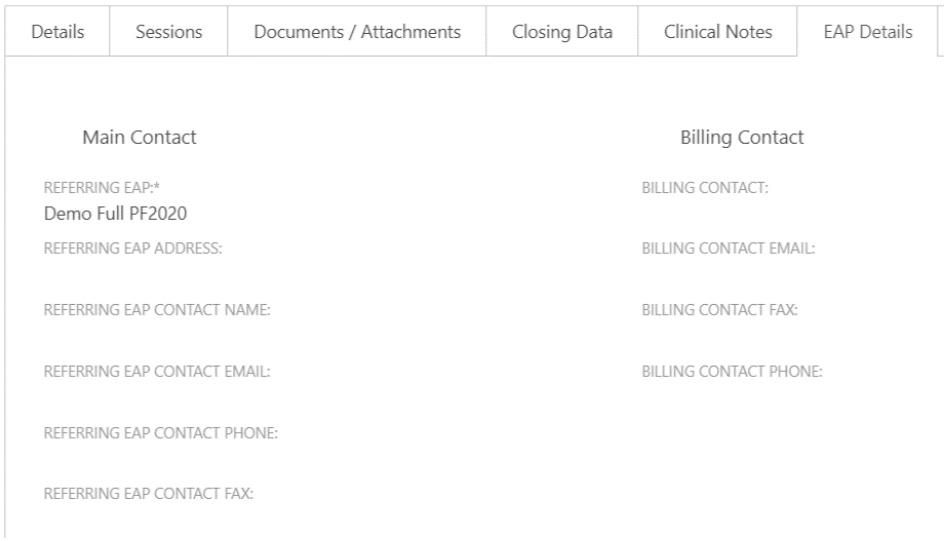
Click **OK** to confirm your selection and return to the previous screen.



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

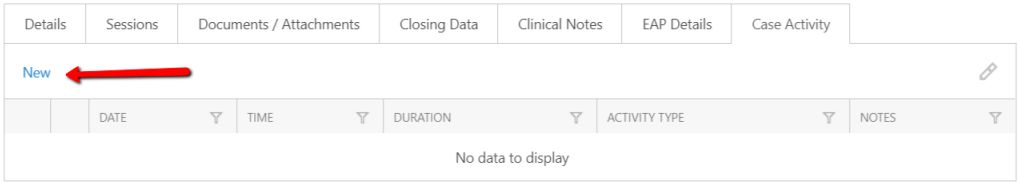


You will be able to find your client's **EAP Details** in the last tab in cases where you need to contact First Sun EAP.

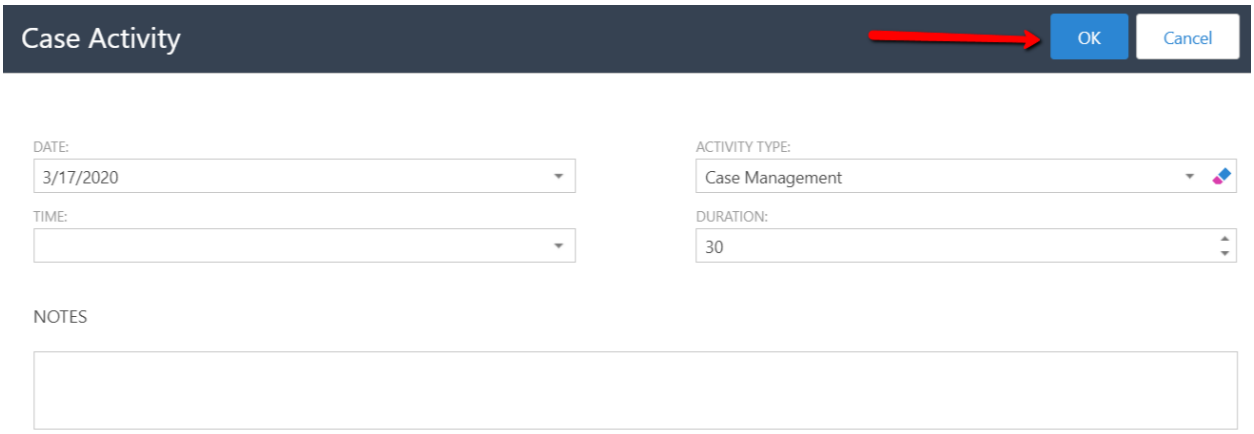


Case Activity allows you to add administrative activities such as follow up calls.

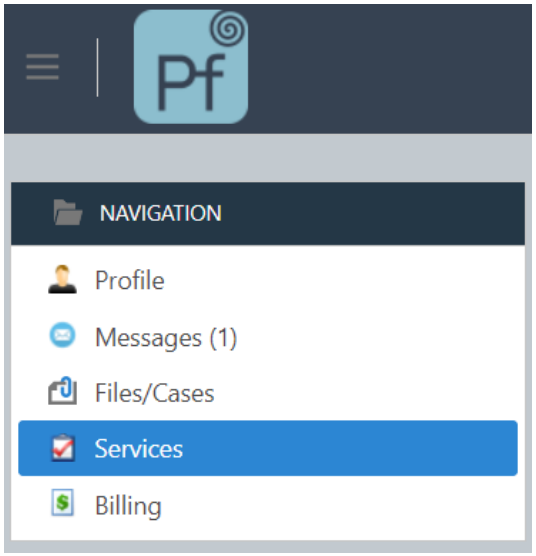
Click **New** to add an activity.



Click **OK** to save the information.



Services



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

Services Opportunities Pending

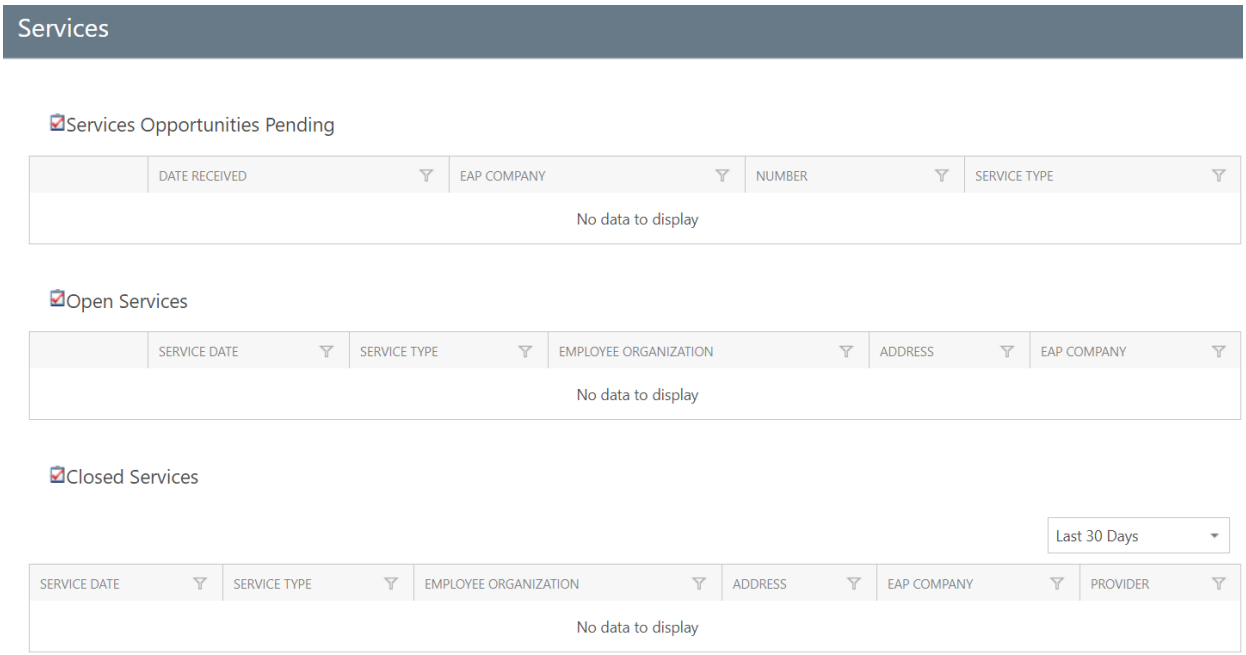
As with Files/Cases, this grid will allow you to accept or reject a service referral. This may include services such trainings, orientations, workshops and critical incidents.

Open Services

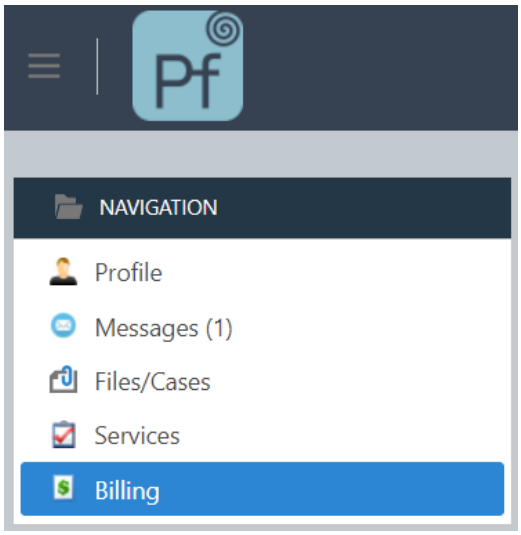
This grid allows you to enter all required information regarding the service.

Closed Services

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



Billing



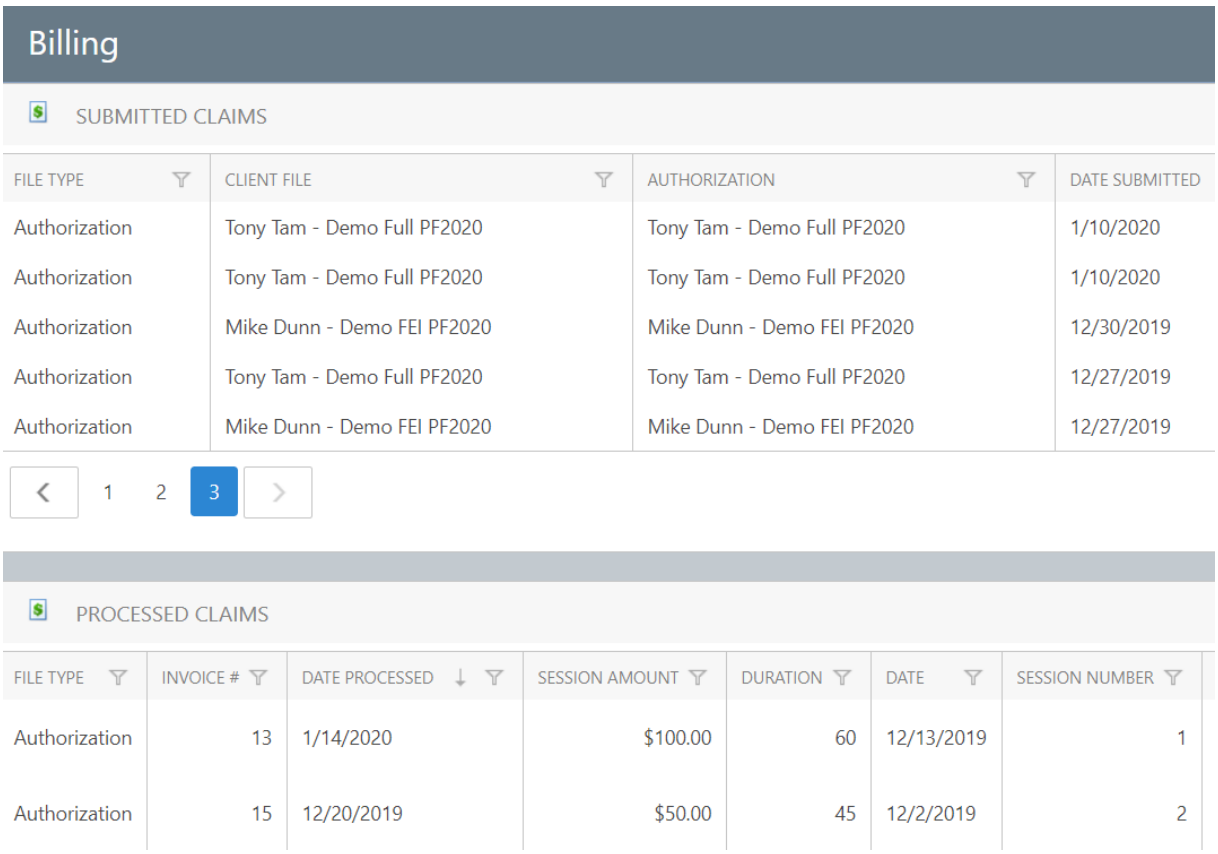
After signing in, click on **Billing** where you will see your submitted and process claims.

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	CLIENT FILE	AUTHORIZATION	DATE SUBMITTED
Authorization	Tony Tam - Demo Full PF2020	Tony Tam - Demo Full PF2020	1/10/2020
Authorization	Tony Tam - Demo Full PF2020	Tony Tam - Demo Full PF2020	1/10/2020
Authorization	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 Dunn - Demo FEI PF2020	Mike Dunn - Demo FEI PF2020	12/27/2019

1 2 3

PROCESSED CLAIMS

FILE TYPE	INVOICE #	DATE PROCESSED	SESSION AMOUNT	DURATION	DATE	SESSION NUMBER
Authorization	13	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.**