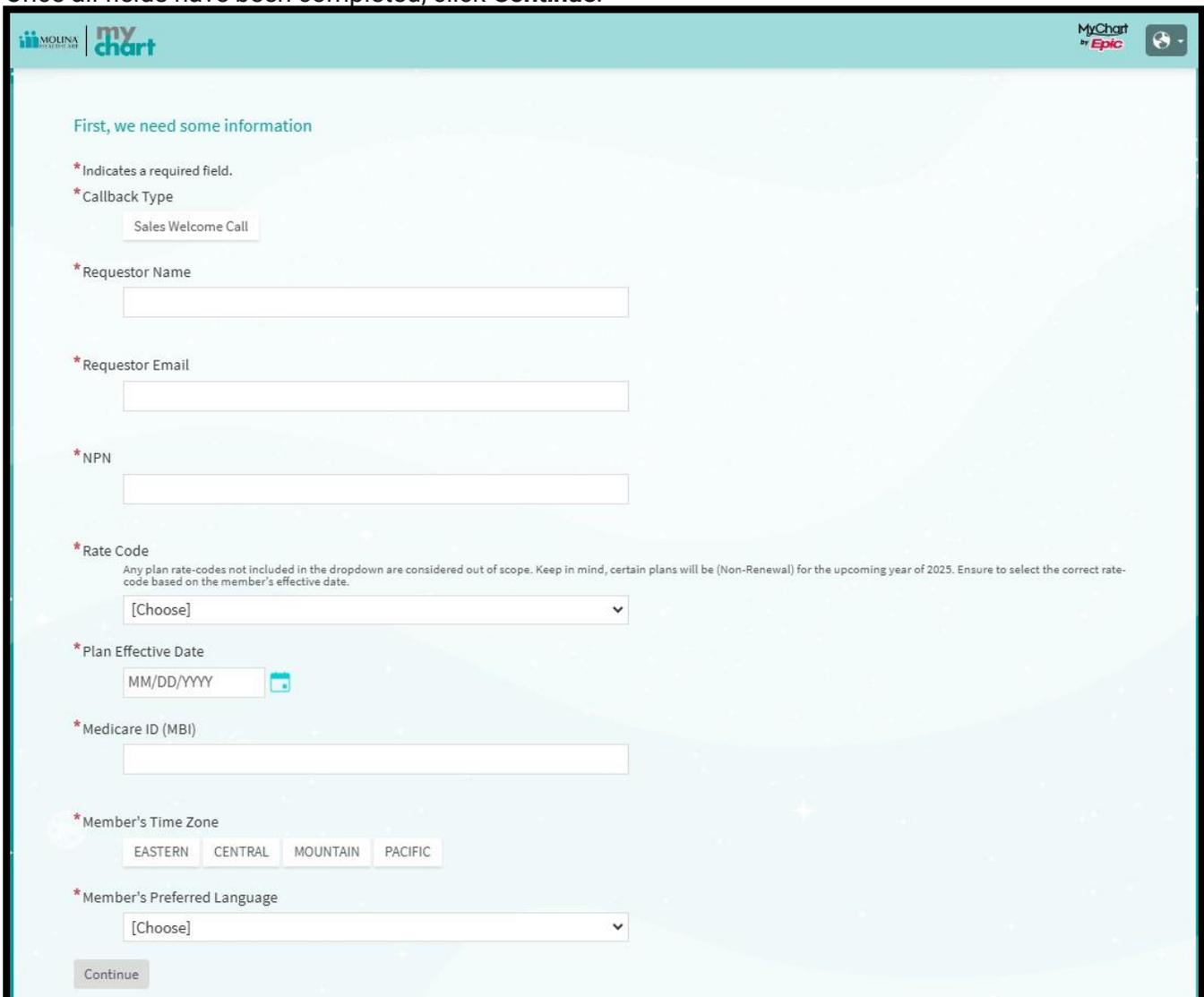


Epic Scheduling is a tool used to schedule Sales Welcome Calls with the Molina Medicare Concierge team.

## To schedule a Sales Welcome Call

- Open the Epic Scheduling website with the link provided. [Welcome Call Scheduling Tool](#)
- On the first screen, enter the required details:
  - Callback Type:
    - i. Sales Welcome Call
  - Requestor Name
  - Requestor Email
  - NPN
  - Rate Code
    - i. Note: Any plan rate-codes not included in the dropdown are considered out of scope.
    - ii. Rate Code format is listed as "Year State Contract-PBP". Example: 2024 AZ H8845-002
    - iii. MMPs will be at the top of the list.
  - Plan Effective Date
  - Medicare ID (MBI)
  - Member's Time Zone
  - Member's Preferred Language
- Once all fields have been completed, click **Continue**.



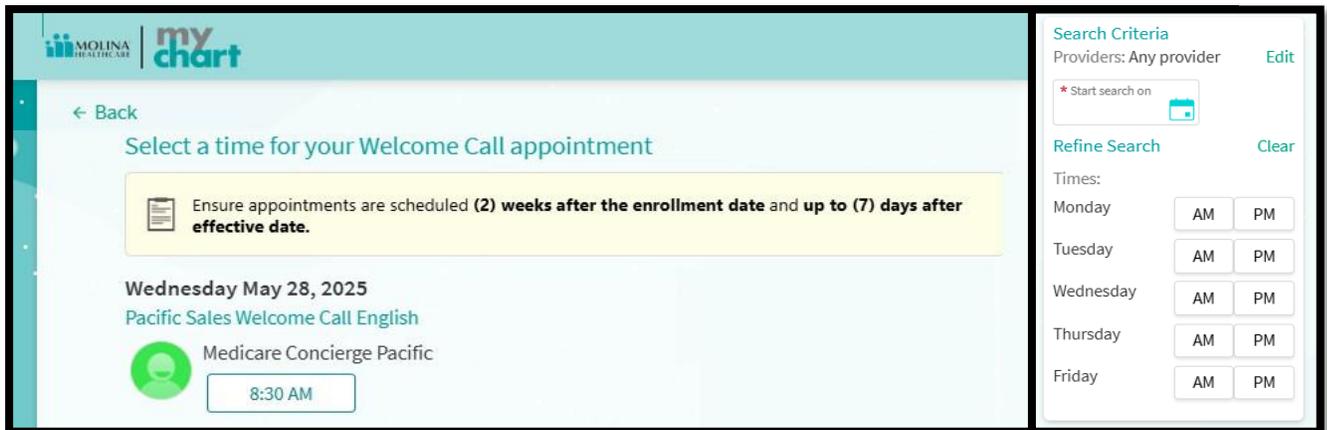
The screenshot shows the 'First, we need some information' form on the Epic Scheduling website. The form includes the following fields and options:

- Callback Type:** A dropdown menu with 'Sales Welcome Call' selected.
- Requestor Name:** A text input field.
- Requestor Email:** A text input field.
- NPN:** A text input field.
- Rate Code:** A dropdown menu with '[Choose]' selected. A note below the dropdown states: 'Any plan rate-codes not included in the dropdown are considered out of scope. Keep in mind, certain plans will be (Non-Renewal) for the upcoming year of 2025. Ensure to select the correct rate-code based on the member's effective date.'
- Plan Effective Date:** A date input field with the format 'MM/DD/YYYY' and a calendar icon.
- Medicare ID (MBI):** A text input field.
- Member's Time Zone:** A set of buttons for 'EASTERN', 'CENTRAL', 'MOUNTAIN', and 'PACIFIC'.
- Member's Preferred Language:** A dropdown menu with '[Choose]' selected.

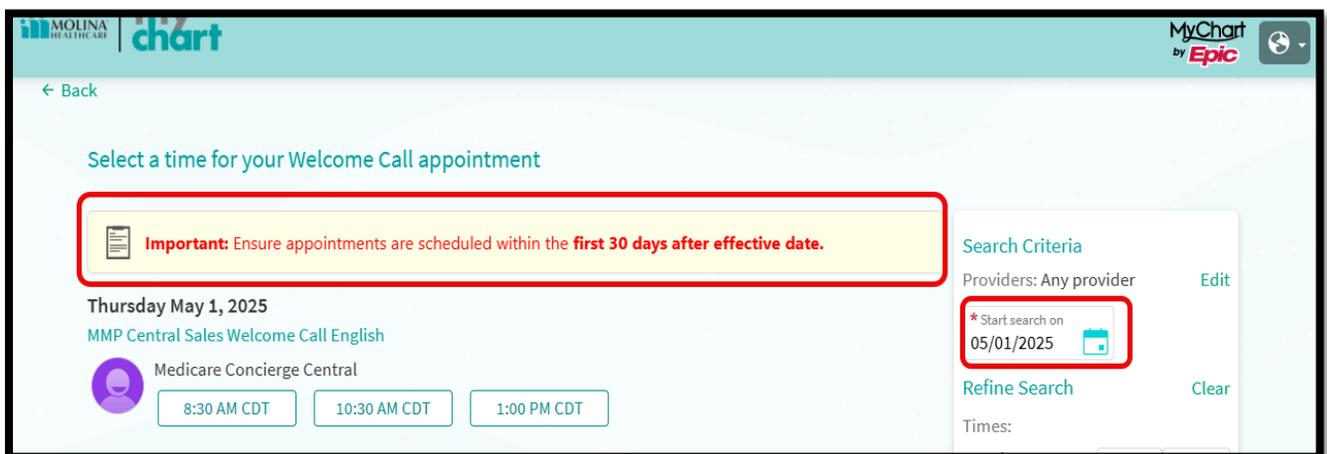
A 'Continue' button is located at the bottom left of the form.

## Epic Scheduling: Sales Welcome Call

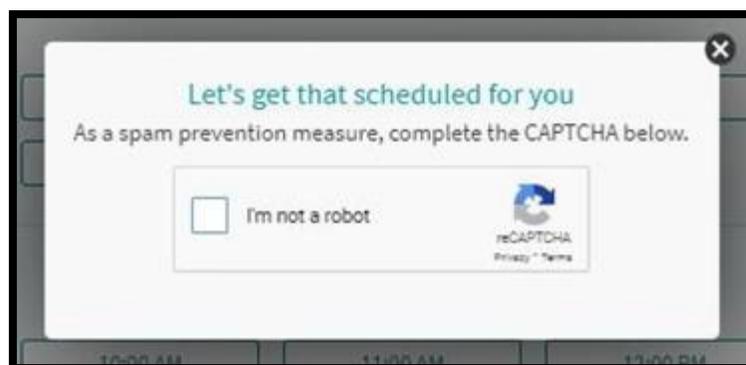
- The Scheduling screen will appear and show available dates and times.
  - Use the section on the right side to select a specific date or to refine times by AM and/or PM.
  - **DSNP/MAPD Reminder:** Ensure appointments are scheduled (2) weeks after the enrollment date and up to (7) days after effective date.



**MMP Reminder:** Due to compliance requirements, MMP appointment calls **MUST** be scheduled within the member's first month of enrollment.



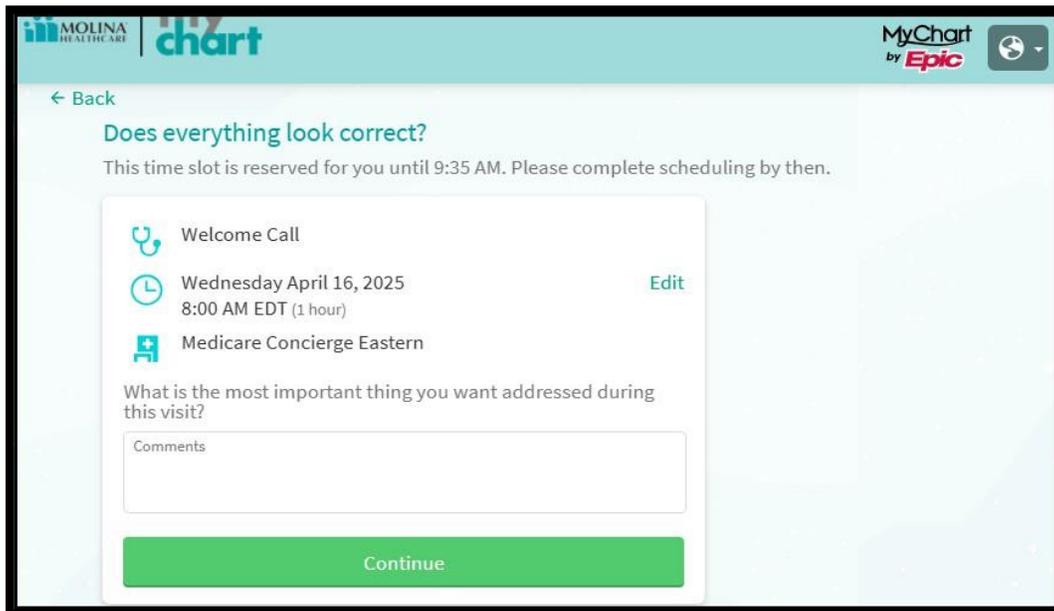
- Select the desired Date and Time for the Sales Welcome Call.
- Once selected, a CAPTCHA window will appear.
  - Select I'm not a robot checkbox.



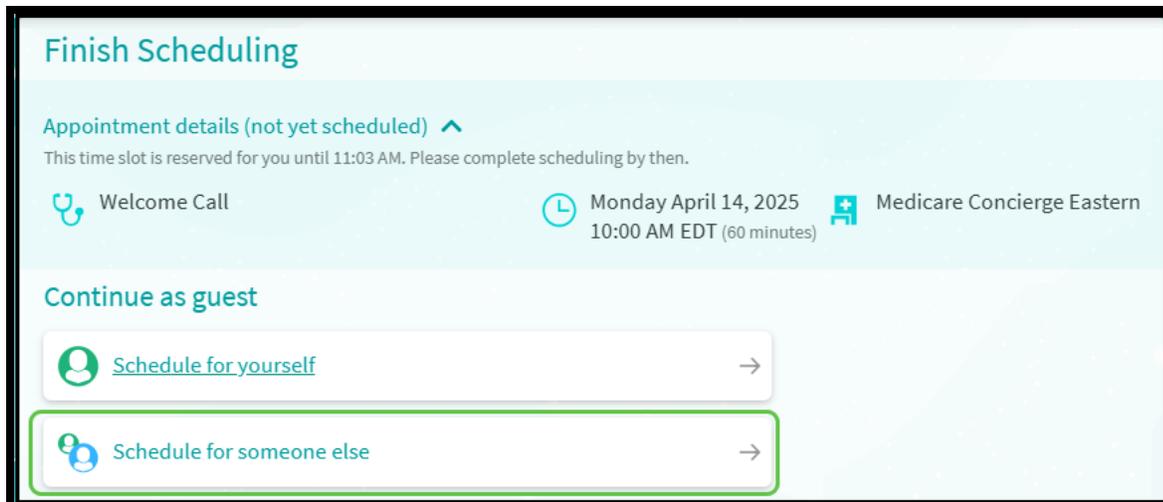
- Follow the instructions to pass the validation.

## Epic Scheduling: Sales Welcome Call

- The **Appointment Confirmation** screen will appear.
  - Review the appointment details and confirm correct.
  - Enter any additional details specific to the call in the text field if needed.
  - Select Continue.

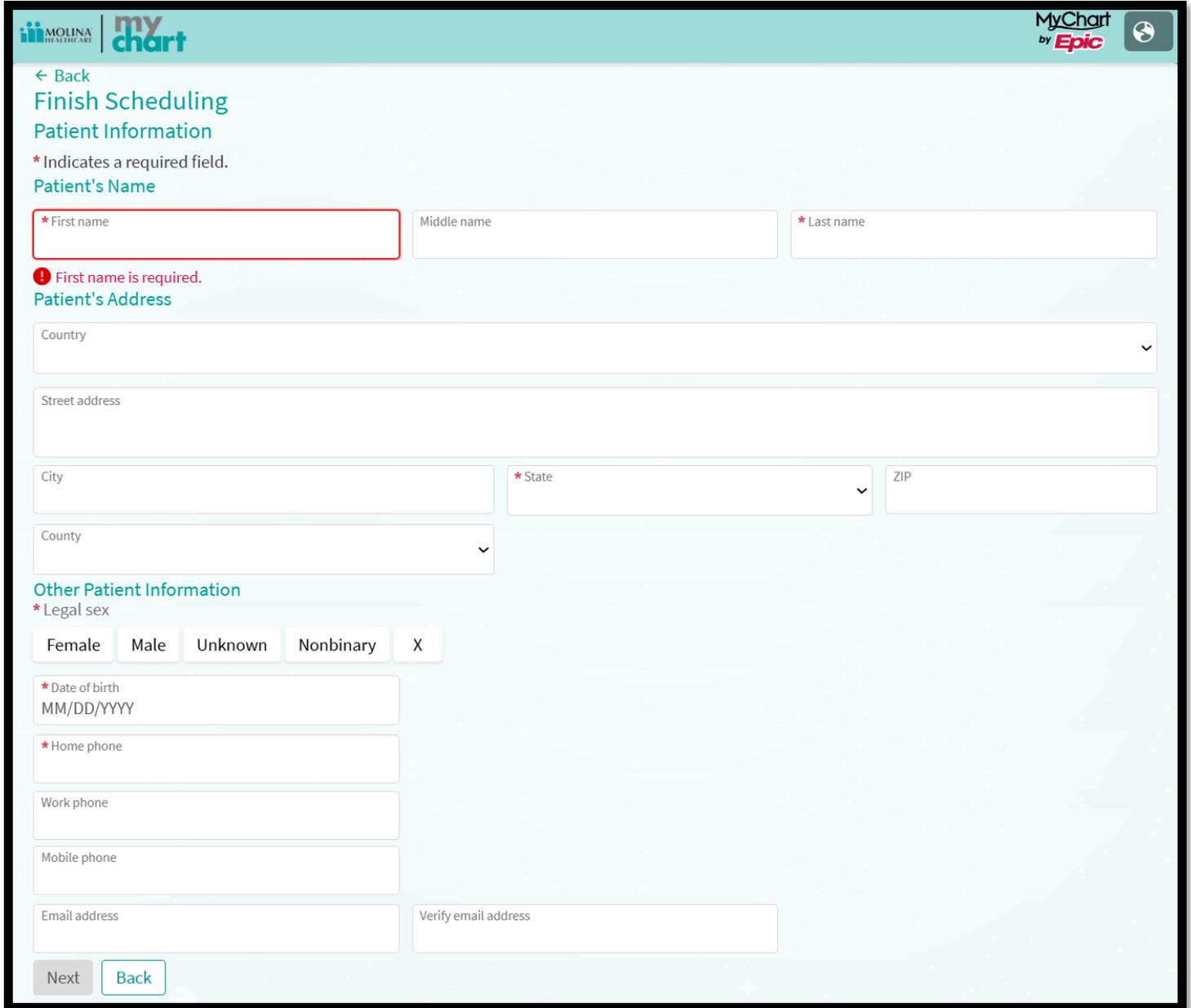


- The Finish Scheduling screen will appear.
  - Select **Schedule for someone else**.



# Epic Scheduling: Sales Welcome Call

- The Member Demographics screen will appear.
  - Enter member details.
    - Required fields: First Name, Last Name, State, Legal Sex, Date of Birth and Home Phone.
  - Once completed, select Next.



← Back

## Finish Scheduling

### Patient Information

\* Indicates a required field.

#### Patient's Name

\* First name  Middle name  \* Last name

! First name is required.

#### Patient's Address

Country

Street address

City  \* State  ZIP

County

#### Other Patient Information

\* Legal sex

Female  Male  Unknown  Nonbinary  X

\* Date of birth  MM/DD/YYYY

\* Home phone

Work phone

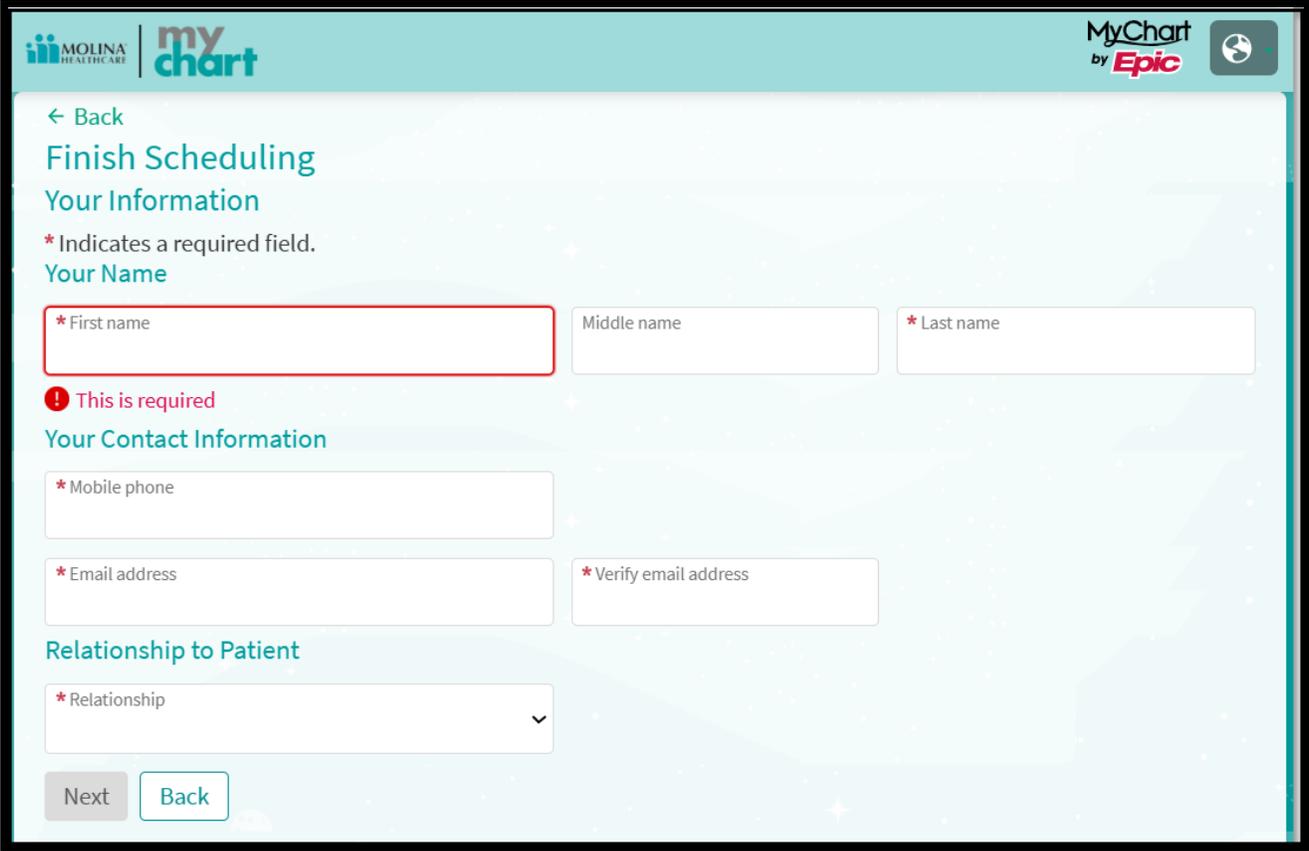
Mobile phone

Email address  Verify email address

Next  Back

## Epic Scheduling: Sales Welcome Call

- The You Information screen will appear, complete the required fields.
  - Relationship to Patient: Sales Agent**



← Back

### Finish Scheduling

#### Your Information

\* Indicates a required field.

#### Your Name

\* First name  Middle name  \* Last name

**This is required**

#### Your Contact Information

\* Mobile phone

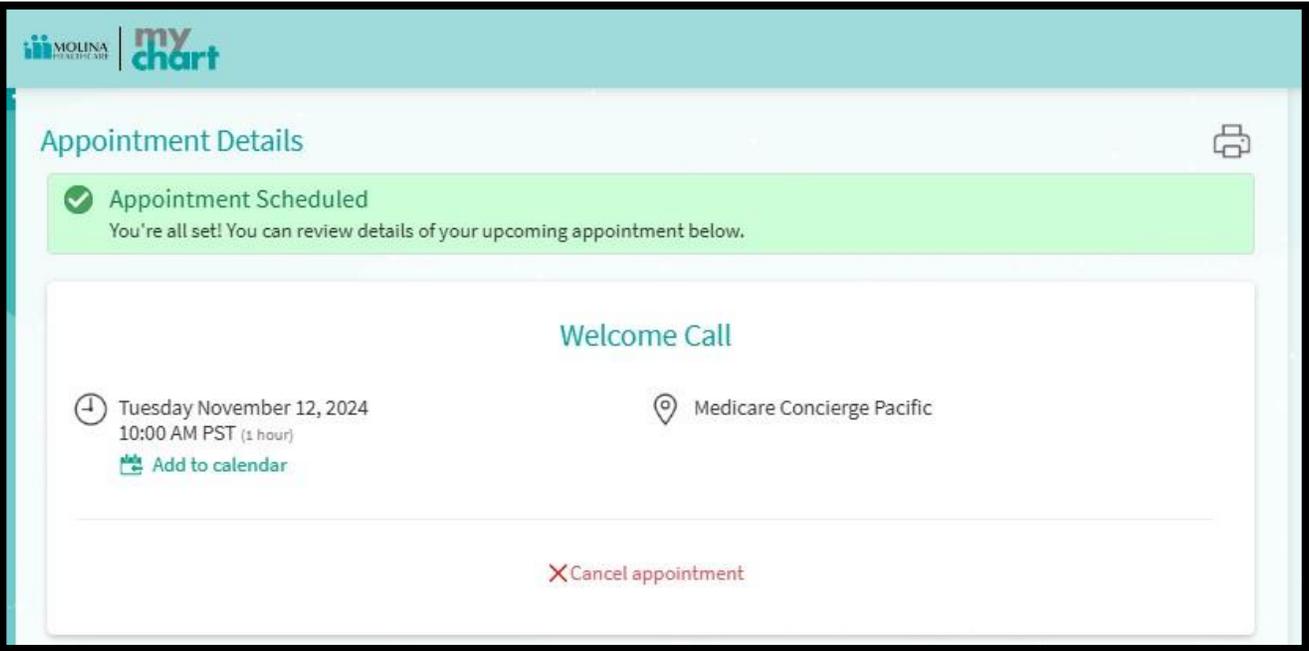
\* Email address  \* Verify email address

#### Relationship to Patient

\* Relationship

Next

- Select Next to Submit
- The Appointment Details screen will appear with the scheduled appointment information.



### Appointment Details

Appointment Scheduled  
You're all set! You can review details of your upcoming appointment below.

#### Welcome Call

🕒 Tuesday November 12, 2024 10:00 AM PST (± hour)

📍 Medicare Concierge Pacific