

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
 - o Requestor Name
 - o Requestor Email
 - o NPN
 - o 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.

		* Epic
First, we need some information		
* Indicates a required field		
*Callback Type		
Sales welcome Call		
*Requestor Name		
* Requestor Email		
Requestor Email		
*NPN		
*Rate Code		
*Rate Code Any plan rate-codes not included in the dropdown are considered out of sco code based on the member's effective date.	pe. Keep in mind, certain plans will be (Non-Renewal) for the upcoming year of 2025. Ensure to select the co	orrect rate-
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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.

MOLINA Chart	Search Criteria Providers: Any pr	rovider	Edit
← Back	* Start search on		
Select a time for your Welcome Call appointment	Refine Search		Clear
Ensure appointments are scheduled (2) weeks after the enroliment date and up to (7) days after effective date.	Times: Monday	AM	РМ
	Tuesday	AM	PM
Wednesday May 28, 2025	Wednesday	AM	PM
Medicare Concierge Pacific	Thursday	AM	РМ
8:30 AM	Friday	AM	РМ

MMP Reminder: Due to compliance requirements,

MMP appointment calls MUST be scheduled within the member's first month of enrollment.

MMOLINA MALINEAR Chart		MyChart ^{by} Epic	•
← Back Select a time for your Welcome Call appointment			
Important: Ensure appointments are scheduled within the first 30 days after effective date.	Search Criteria Providers: Any provider	Edit	
Thursday May 1, 2025 MMP Central Sales Welcome Call English	* Start search on 05/01/2025		
Medicare Concierge Central 8:30 AM CDT 10:30 AM CDT 1:00 PM CDT	Refine Search Times:	Clear	

- 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.

HEALTHCARE	chart	MyChart ** Epic
← Back		
Do	es everything look correct?	
This	s time slot is reserved for you until 9:35 AM. Please complete schedul	ing by then.
c	Velcome Call	
(Wednesday April 16, 2025 Edit 8:00 AM EDT (1 hour) Edit	
	Medicare Concierge Eastern	
W tł	/hat is the most important thing you want addressed during his visit?	
	Comments	
	Continue	

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

Finish Scheduling	
Appointment details (not yet scheduled) This time slot is reserved for you until 11:03 AM. Please completed the second statement of the second statem	ete scheduling by then.
Velcome Call	Monday April 14, 2025 10:00 AM EDT (60 minutes) Medicare Concierge Eastern
Continue as guest	
Schedule for yourself	\rightarrow
Schedule for someone else	\rightarrow



- 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.

iii Molilina Chart		MyChart ** Epic
 ← 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	х	
* Date of birth MM/DD/YYYY		
* Home phone		
Work phone		
Mobile phone		
Email address	Verify email address	
Next Back		



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

			MyChart ^{by} Epic	3
← 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 Back				

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

iii MOUINA Chart			
Appointment Details		ē	
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 (1 hour) Add to calendar	Medicare Concierge Pacific		
× Cancel appointment			