

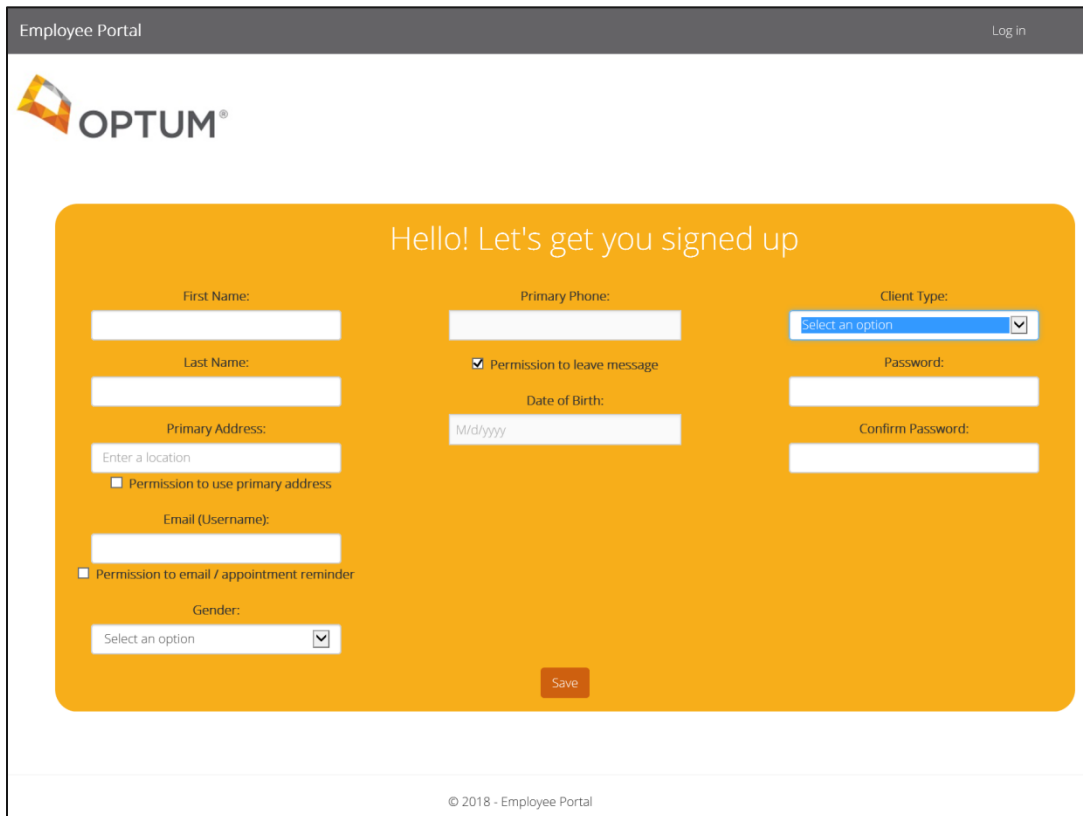
Optum On-site Employee Assistance Program (EAP) Solutions FAQ

Q: How do I schedule an appointment with an On-site EAP Consultant?

A: In order to schedule an appointment online, you'll need to register on the scheduling [portal site](#) by creating a user ID and password. If you have already registered, you can skip to Step 2 below.

Step 1: Create an account

1. Click on the on-site custom portal link provided to you by your employer.
2. You will be prompted to create an account.



The screenshot shows the 'Employee Portal' registration page. At the top left is the 'Employee Portal' header and the Optum logo. At the top right is a 'Log in' link. The main content area is a large orange box with the heading 'Hello! Let's get you signed up'. Below the heading are several input fields and checkboxes: 'First Name', 'Last Name', 'Primary Address' (with a sub-field 'Enter a location'), 'Email (Username)', 'Gender' (with a dropdown menu), 'Primary Phone', 'Date of Birth' (with a 'M/d/yyyy' placeholder), 'Client Type' (with a dropdown menu), 'Permission to leave message' (checked), 'Permission to use primary address' (unchecked), and 'Permission to email / appointment reminder' (unchecked). There are also 'Password' and 'Confirm Password' fields. A red 'Save' button is located at the bottom center of the orange box. At the bottom of the page, there is a copyright notice: '© 2018 - Employee Portal'.

3. Enter your personal information as requested:
 - a. First Name
 - b. Last Name
 - c. Address
 - d. Email
 - e. Gender
 - f. Phone number
 - g. Date of Birth
 - h. Select the applicable "Client Type" from the drop-down menu.
 - i. Create a password:
 - i. Password must be a minimum of 8 characters and include one uppercase letter, one special character and one number. It is recommended to use the

combination in the following order: uppercase letter, special character and number. Example: Password@123

- j. Confirm your password.
4. Once you review and accept the terms of the privacy policy for your country, you will be directed to the login screen to log in.
5. Congratulations — you’ve successfully registered on the scheduling portal site!

Step 2: Log in to your account

1. Click on the on-site custom portal link provided to you by your employer.
2. Select “log in” from the upper right-hand corner.
3. You will be prompted to log in to your account.

Employee Portal

OPTUM

Hello! Please sign in.
Use a EAP account to log in.

Email/Username

Password

Remember me?

[Forgot your password?](#)

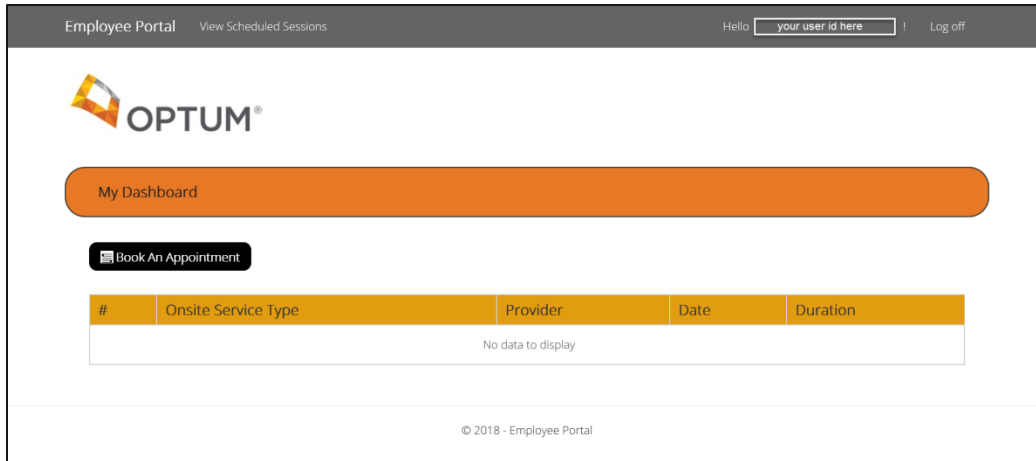
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4. Enter your selected user name and password to log in to your account.

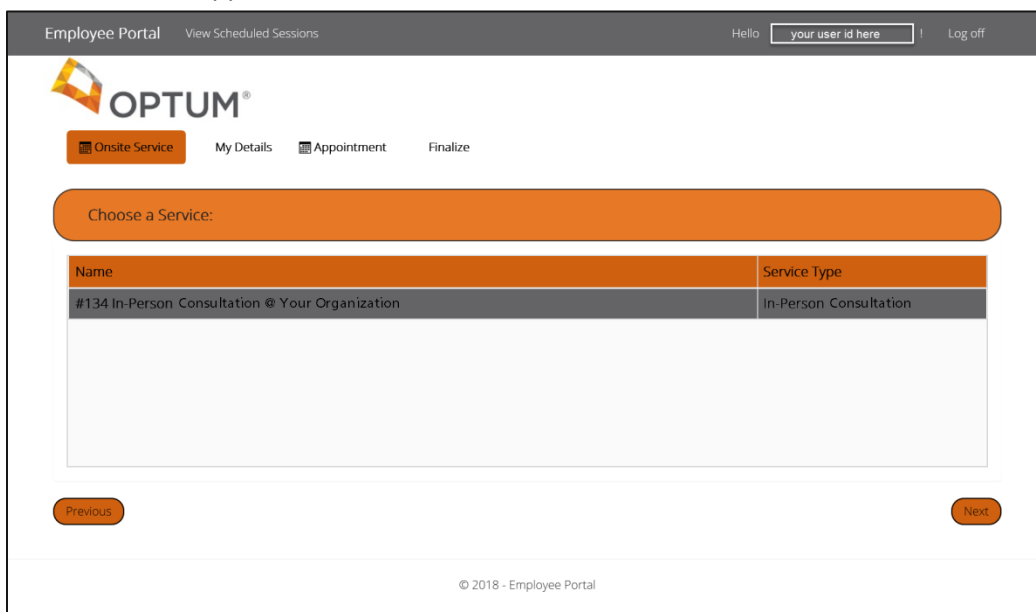
Step 3: Book an appointment

The “On-site Service” tab

1. Once you log in to your account, you will be brought to the dashboard of services available to you.



2. Select "Book an Appointment".



3. Select the service you are interested in (the service will highlight grey).

4. Select "Next".

The “My Details” tab

Employee Portal View Scheduled Sessions Hello ! Log off

OPTUM®

Onsite Service **My Details** Appointment Finalize

Service Type: In-Person Consultation

First Name: *

Last Name: *

Primary Address: *
 Permission to use primary address

Gender: *

Primary Phone: *

Permission to leave message

Email:
 Permission to email / appointment reminder
 Permission to send survey

Employee Type: *

Information Source: *

Presenting Problem: *

Have you missed any work recently due to this issue, if so, please indicate hours here:

Please rate your level of wellbeing BEFORE accessing the service. On a scale of 1 to 10, 1 being unable to function, 10 being highly functional. *

Please rate your ability to manage stress BEFORE accessing the service. On a scale of 1 to 10, 1 being unable to manage stress, 10 being coping well with stress. *

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1. You will be prompted to enter your personal and contact information, such as name, phone number, address, email, etc.
2. Click “Permission to leave message” if you are comfortable with a provider leaving a confidential message in your voicemail box.
3. We will be asking some additional information to better understand your situation. Answer these questions to the best of your ability:
 - a. Rate your level of wellbeing at the time you are scheduling the appointment on a scale from 1 to 10.
 - b. Did you miss any work as a result of your issue?
 - c. Assess your ability to handle stress on a scale from 1 to 10.
4. Select “Next”.

The "Appointment" tab

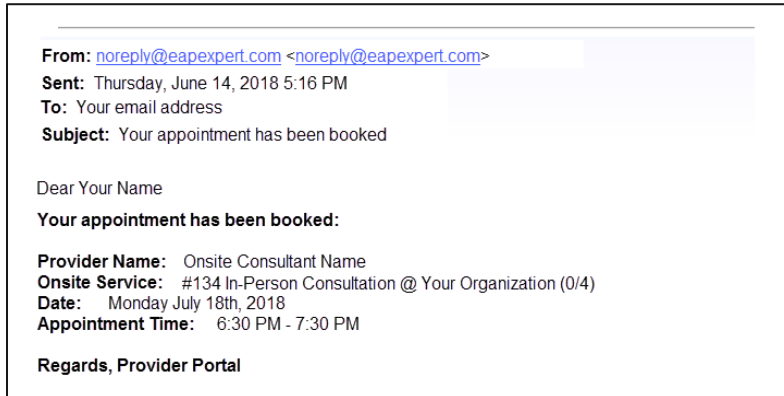
The screenshot shows the 'Appointment' tab in the Employee Portal. At the top, there's a header with 'Employee Portal', 'View Scheduled Sessions', a user ID field, and a 'Log off' button. Below the header is the OPTUM logo and navigation tabs: 'Onsite Service', 'My Details', 'Appointment' (selected), and 'Finalize'. A 'Location' dropdown menu is set to 'Location 1'. The main content area is titled 'Available Appointments' and lists two slots: 'Onsite Consultant Name - 7/16/2018 (4:00 PM - 5:00PM)' and 'Onsite Consultant Name - 7/16/2018 (6:30 PM - 7:30PM)'. A smaller version of this list is shown in a preview window. To the right is a calendar for June 2018, with the 26th highlighted in grey. Below the calendar is a 'Today' button. At the bottom are 'Previous' and 'Next' buttons.

1. Select the appropriate office location from the drop-down menu.
2. Click on the calendar on the right side of the screen to see appointment availability.
3. Select an appointment date and time that works best for you (the appointment will highlight grey).
4. Select "Next".

The "Finalise" tab

The screenshot shows the 'Finalize' tab in the Employee Portal. The header is the same as the previous screen. The navigation tabs are 'Onsite Service', 'My Details', 'Appointment', and 'Finalize' (selected). Below the tabs is a 'My Details' section with an 'Edit Details' link. It contains fields for 'First Name', 'Last Name', 'Primary Address', 'Primary Phone', and 'Email', each with a placeholder text. To the right is a 'Service' section with the text '#134 In-Person Consultation @ Your Organization (0/4)'. Below that is the 'Appointment Time' section, which displays 'Onsite Consultant Name - 7/16/2018 (6:30PM - 7:30PM)'. There is also a 'Location Notes' field. At the bottom are 'Previous' and 'Submit' buttons.

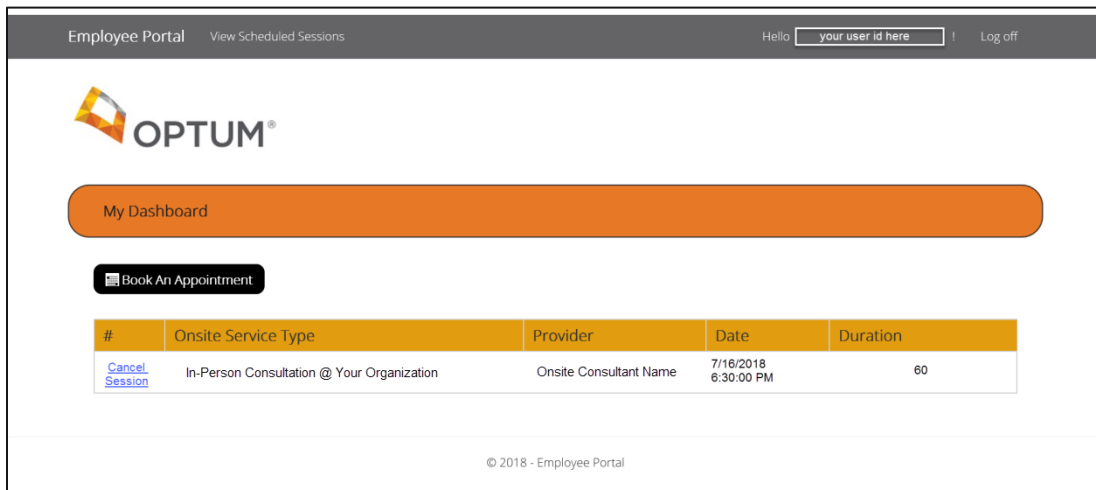
1. You will be asked to review all information for accuracy.
2. If you need to make corrections, click “Previous” and you will be brought to the screen where you entered all your information.
3. If everything is accurate, click “Submit”.
4. You will receive an email confirming your appointment date, time, location and provider name.



Q: How do I cancel an appointment?

A: Cancelling an appointment is quick and easy. Follow these steps:

1. Log in to the portal.
2. You will be brought to your dashboard.



3. Select “Cancel Session”.
4. You will be asked “Are you sure you want to cancel this session?”
5. Click “OK”.
6. Your dashboard will be updated and the appointment will be removed.

Q: How do I reschedule an appointment?

A: To reschedule an appointment, follow these steps:

1. Follow the steps to cancel an appointment.
2. Book a new appointment following the steps outlined under **Step 3: Book an appointment.**