

Experts' Dashboard Guide

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1. Creating an account

The screenshot shows a web browser window with the title 'EAP Experts' Dashboard'. The page content includes a welcome message, login details ('Username: probaangol', 'Password: probaangol'), instructions for logging in, and information about tracking cases and using the dashboard. A red arrow points to the URL 'https://expertdashboard.chestrutce.com' with the text 'Click!' overlaid.

Dear Proba angol!

Welcome among our partners! During the EAP programme, we will connect you with clients through the self-developed website of CGP Europe called Experts' Dashboard. We will send you a notification of every case assigned to you to the email address you have provided: zoltan.csepregi@chestrutce.com

To visit Experts' Dashboard, follow this link:
<https://expertdashboard.chestrutce.com> **Click!**

The login details of your personal page at Experts' Dashboard are the following:

Username: probaangol
Password: probaangol

Please use this username and password to log in to Experts' Dashboard as soon as possible. You can confirm your account by logging in to the site for the first time. Please note that we can only connect you with clients in the future after you have confirmed your account.

Without that, there will be no cases waiting for you after logging in to Experts' Dashboard. The site doesn't store previous cases, those have to be documented, closed and invoiced as before. Your Dashboard will be gradually filled with content as you get assigned new cases.

You can change your password after logging in, under the 'Password Setting' option.

What are the advantages of Experts' Dashboard?

You can closely track the current status of your cases, check which ones are ready to be invoiced, which ones are waiting for approval; you can quickly react to new cases, providing up to date information to operators.

What can you use the Experts' Dashboard website for?

You can accept or decline new cases, record getting in touch with the client, register consultation appointments in the case profile, and conclude cases by uploading client satisfaction surveys.

Please check out and read the attached User Guide to Experts' Dashboard in order to start using this platform as soon and as easily as possible.

Should you have any questions about Experts' Dashboard, please send us an email to:

Creating an Experts' Dashboard account

You will receive an email with information about your account created automatically for you by CGP Europe. You can confirm your account via this email. You will find a link in the email through which you can easily access Experts' Dashboard. The email also contains your username and password for Experts' Dashboard. You can change your password after your first login, if you wish. Your first login also confirms your account.

The screenshot shows a web browser window with the title 'EAP Experts' Dashboard'. The page content includes a welcome message, instructions for receiving new cases, and a note about reading the user guide. A red arrow points to the URL 'https://expertdashboard.chestrutce.com' with the text 'Click!' overlaid.

Dear Proba angol!

Thank you for confirming your account registered at Experts' Dashboard. From now on, you will be assigned new cases through the Experts' Dashboard website.

How will you receive new cases?

Same as before, you will get notified of new cases via email, but the email will not contain details of the cases anymore. However, every email will have a link pointing to the case profile on Experts' Dashboard. You can check out the details of the particular case there. That is also where you can carry out relevant administrative tasks—please carefully read the User Guide for more information on these.

We also ask you to carefully read the 'Term and Conditions of the Cooperation' at the Experts' Dashboard site.

To visit Experts' Dashboard, click:
<https://expertdashboard.chestrutce.com>

Should you have any questions about Experts' Dashboard, please send us an email to helpdesk@chestrutce.com

Thank you for your cooperation!

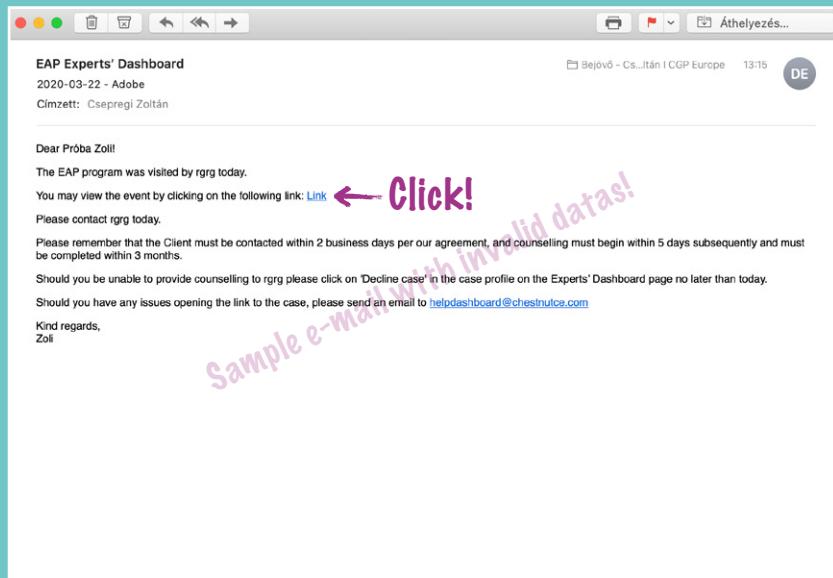
Best regards,
CGP Europe

Expert
Dashbo...ide.pdf

Successful activation of your account

After you have successfully logged in to the dashboard with your username and password, you will receive a confirmation email about the successful activation of your account. After that, all you have to do is wait for the cases assigned to you.

2. Assigning new cases



Assigning a case via email

Cases are assigned via email, but the email will not include the case details. You can view those by clicking a link found in the assignment email, leading to Experts' Dashboard. The profile of the assigned case will be automatically displayed after you log in.

A screenshot of the 'Case view' page in the CGP Europe dashboard. It shows various case details and action buttons.

2020-03-18 - Suzuki - XXXXX YYYY - Psychological - Tápiószentmárton - XY

ID: 261 The date the case was recorded: 2020-03-18 20:44 Company name: Suzuki Was it a crisis call?: No

Client name: XY City of consultation: Tápiószentmárton Place of receipt: Online Type of problem: Psychological

Call length: 0 Employee / Family Member: Employee Male / Female: Male Age: Unknown

Where did you hear about the program?: Unknown Was it a backup call?: No Problem details: Other family problems

Phone number of Client (if not provided, put 'unknown'): 06 30 111 1111

Email address of Client (if not provided, put 'unknown'): Other comment (if none, put 'none'): none

Chat or Email text (if none, put 'none'): none Number of available consultations: 5 Duration of consultation in minutes: 50

Operator name: XY Type of consultation requested: E-mail Expert outsourced: XXXXX YYYY Number of sessions: 0

Add session Upload satisfaction feedback form Submission of client satisfaction feedback form not possible

Upload treatment log

CLIENT HAS BEEN CONTACTED CLIENT UNREACHABLE DECLINE CASE

EMAILING THE AGENT CLOSE CASE

BACK TO LIST

Case profile

You find all relevant information about a given case in its case profile. You can access the case profile anytime from the „Cases in progress” menu as long as the case has not been closed. When you close it, it will be transferred to „Closed cases” as soon as it has been approved by CGP Europe.

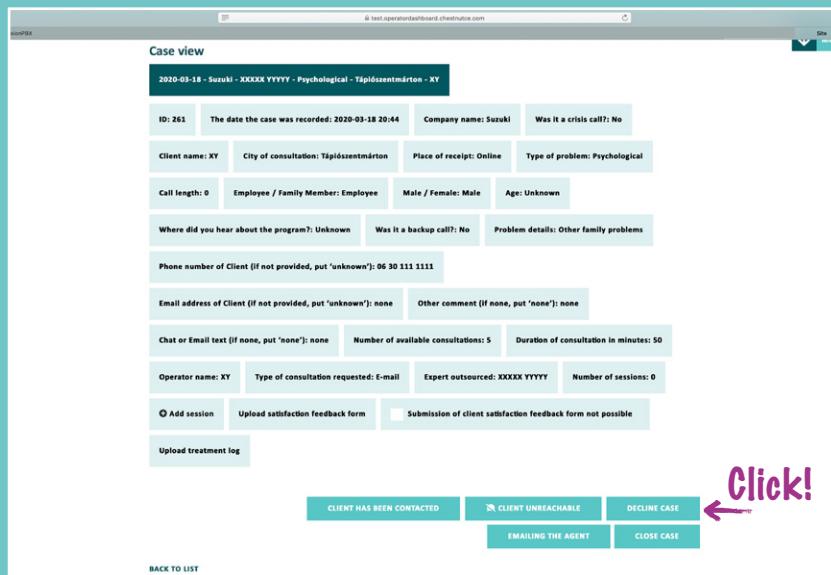
3. Handling cases



The screenshot shows the 'Case view' page for a specific case. At the bottom right of the main content area, there is a row of four buttons: 'CLIENT HAS BEEN CONTACTED' (green), 'CLIENT UNREACHABLE' (grey), 'DECLINE CASE' (grey), 'EMAILING THE AGENT' (grey), and 'CLOSE CASE' (grey). A large pink arrow points from the text 'Click!' to the 'CLIENT HAS BEEN CONTACTED' button.

Accepting a case

Open the case profile of the assigned case after you have contacted the client and click „Client has been contacted”: This will notify the agent that you have accepted the case and that you have already contacted the client. The client has to be contacted within 48 hours after a case has been assigned!



The screenshot shows the 'Case view' page for a specific case. At the bottom right of the main content area, there is a row of four buttons: 'CLIENT HAS BEEN CONTACTED' (green), 'CLIENT UNREACHABLE' (grey), 'DECLINE CASE' (green), 'EMAILING THE AGENT' (grey), and 'CLOSE CASE' (grey). A large pink arrow points from the text 'Click!' to the 'DECLINE CASE' button.

Declining a case

If you don't wish to accept a particular case, click „Decline case”: This will notify the agent that you are unable to accept it, allowing them to promptly reassign the case to another expert. Following this, the relevant case profile will be automatically removed from your case profiles.

3. Handling cases



Case view
2020-03-18 - Suzuki - XXXXX YYYY - Psychological - Tápiószentmárton - XY

ID: 261 The date the case was recorded: 2020-03-18 20:44 Company name: Suzuki Was it a crisis call?: No

Client name: XY City of consultation: Tápiószentmárton Place of receipt: Online Type of problem: Psychological

Call length: 0 Employee / Family Member: Employee Male / Female: Male Age: Unknown

Where did you hear about the program?: Unknown Was it a backup call?: No Problem details: Other family problems

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Email address of Client (if not provided, put 'unknown'): none Other comment (if none, put 'none'): none

Chat or Email text (if none, put 'none'): none Number of available consultations: 5 Duration of consultation in minutes: 50

Operator name: XY Type of consultation requested: E-mail Expert outsourced: XXXXX YYYY Number of sessions: 0

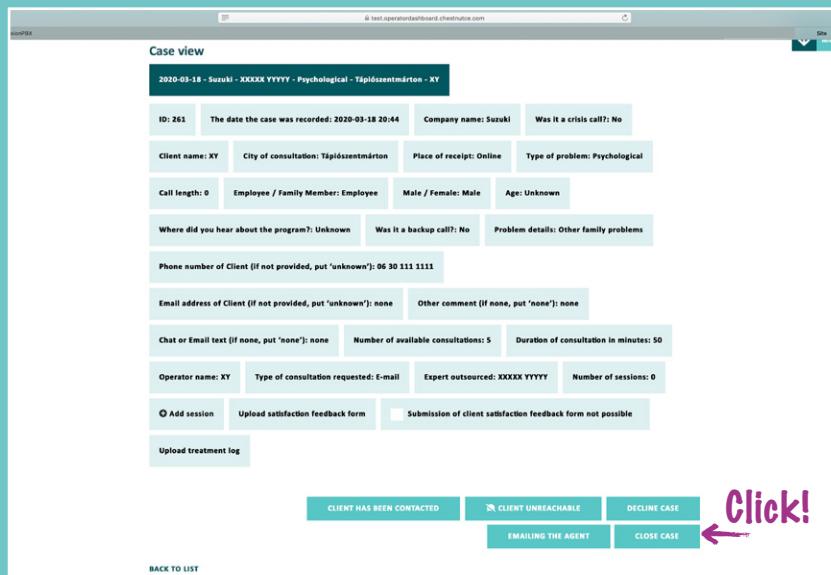
Add session Upload satisfaction feedback form Submission of client satisfaction feedback form not possible

Upload treatment log

CLIENT HAS BEEN CONTACTED CLIENT UNREACHABLE EMAILING THE AGENT CLOSE CASE

Client unreachable

When the client cannot be reached after three phone calls attempted at different times of the day and one text message, the client officially qualifies as unreachable, and the counselling cannot be started. In this case, click „Client unreachable” to simultaneously notify the agent about this and close the case. CGP Europe personnel will approve and close the case profile shortly after this, no further action is required on your part.



Case view
2020-03-18 - Suzuki - XXXXX YYYY - Psychological - Tápiószentmárton - XY

ID: 261 The date the case was recorded: 2020-03-18 20:44 Company name: Suzuki Was it a crisis call?: No

Client name: XY City of consultation: Tápiószentmárton Place of receipt: Online Type of problem: Psychological

Call length: 0 Employee / Family Member: Employee Male / Female: Male Age: Unknown

Where did you hear about the program?: Unknown Was it a backup call?: No Problem details: Other family problems

Phone number of Client (if not provided, put 'unknown'): 06 30 111 1111

Email address of Client (if not provided, put 'unknown'): none Other comment (if none, put 'none'): none

Chat or Email text (if none, put 'none'): none Number of available consultations: 5 Duration of consultation in minutes: 50

Operator name: XY Type of consultation requested: E-mail Expert outsourced: XXXXX YYYY Number of sessions: 0

Add session Upload satisfaction feedback form Submission of client satisfaction feedback form not possible

Upload treatment log

CLIENT HAS BEEN CONTACTED CLIENT UNREACHABLE DECLINE CASE EMAILING THE AGENT CLOSE CASE

Closing a case

Normally, cases are closed after the counselling has concluded, every counselling appointment has been registered in the case profile, and the client satisfaction survey and treatment log have been uploaded.

4. Administration of cases

The screenshot shows the 'Case view' page for a specific case. At the top, it displays the date (2020-03-18), client name (Suzuki), and problem type (Psychological). Below this, there are several input fields for client information, consultation details, and session parameters. A large red arrow labeled 'Click!' points to the 'Add session' button at the bottom left of the main form area.

Registering appointments

After you have arranged an appointment with the client, it has to be registered in the case profile. To do that, click „Add session”, then click „Date of session” in the pop-up field. This will open a calendar, where you can select the date. After this, click „Save”.

Appointments can be added one by one, so you have to click „Add session” again to register every single session. After an appointment has been added, you can edit or delete it if necessary.

This screenshot is similar to the first one, but it includes a modal window titled 'Add session' overlaid on the main page. The modal contains a calendar for selecting the date of the session. A large red arrow labeled 'Click!' points to the calendar's header. The main page background is dimmed.

You can edit the time of an appointment by clicking on the pencil icon.

Date and time of session 1: 2020-03-22

You can delete an appointment by clicking on the trash can icon.

4. Administration of cases

This screenshot shows the 'Case view' page for a specific case. At the top, it displays the case ID (261), date recorded (2020-03-18 20:44), company name (Suzuki), and whether it was a crisis call (No). Below this, there are sections for client details (Client name: XY, City of consultation: Tápiószentmárton, Place of receipt: Online, Type of problem: Psychological), call details (Call length: 0, Employee / Family Member: Employee, Male / Female: Male, Age: Unknown), and consultation details (Where did you hear about the program? Unknown, Was it a backup call? No, Problem details: Other family problems). It also shows the phone number of the client (06 30 111 1111) and email addresses for the operator and client. A 'Chat or Email text' field is present, along with fields for the number of available consultations (5) and duration (50 minutes). Operator details (name: XY, type: E-mail, expert outsourced: XXXXX YYYY, sessions: 0) are also shown. Buttons at the bottom include 'Add session', 'Upload satisfaction feedback form', 'Submission of client satisfaction feedback form not possible', and 'Upload treatment log'. A prominent 'Click!' button with an arrow points to the 'EMAILING THE AGENT' button.

Emailing the agent

Click „Emailing the agent” if you have any requests, questions or comments about the case or you want to share information relevant to the case with the agent that has assigned the case to you.

As you click this button, a window will pop up. Click in the text field, and start typing your message. When you have finished writing, click „Send”. The operator will receive your email right away and will send their reply to the email address submitted by you previously. The dashboard will also automatically send an email summary to this email address, stating the exact copy of the message sent to the agent.

This screenshot shows the same 'Case view' page as the previous one, but with an 'Emailing the agent' modal window open. The modal contains a text input field labeled 'Write here the text of the email' with an arrow pointing to it, and a 'Send' button below it. The background of the main page is dimmed to indicate it is not active while the modal is open.

4. Administration of cases

The screenshot shows the 'Case view' page for a specific case. At the bottom right, there are four buttons: 'CLIENT HAS BEEN CONTACTED', 'CLIENT UNREACHABLE' (which has a red arrow pointing to it with the text 'Click!'), 'EMAILING THE AGENT', and 'CLOSE CASE'. The 'CLIENT UNREACHABLE' button is highlighted with a red box.

Client becomes unreachable

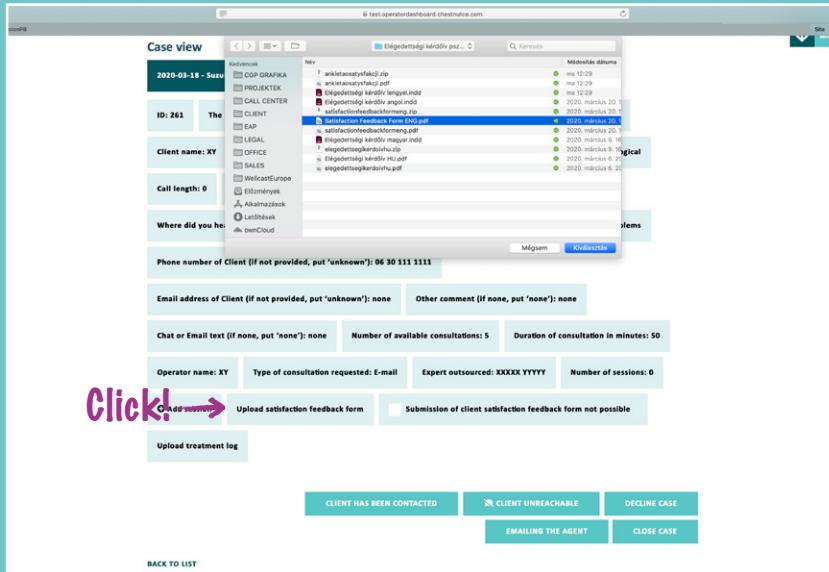
Sometimes the counselling starts, but the client doesn't show up for the first appointment and becomes unreachable. In such cases, the case can be closed by clicking „Client unreachable” after three unsuccessful phone calls and one text message. Make sure you delete the previously registered appointment from the case profile, as it has not happened.

The screenshot shows the 'Case view' page for a specific case. At the bottom right, there are four buttons: 'CLIENT HAS BEEN CONTACTED', 'CLIENT UNREACHABLE', 'EMAILING THE AGENT', and 'CLOSE CASE'. The 'CLIENT UNREACHABLE' button is highlighted with a red box. A red arrow points to the 'Submission of client satisfaction feedback form not possible' checkbox in the footer, which is checked.

If the client has become unreachable after having attended a few sessions, you can close the case after uploading the treatment log. The client satisfaction survey cannot be filled out in such cases, so you have to check the „Submission of client satisfaction feedback form not possible” box to be able to close the case.

Submission of client satisfaction feedback form not possible

4. Administration of cases



The screenshot shows the "Case view" page for case ID 261. The left sidebar lists categories like Klientek, Projektek, Call Center, Client, EAP, Legal, Office, and more. The main area displays a list of attachments with their names and upload dates. One attachment is highlighted: "Satisfaction Feedback Form (ENG).pdf". Below the attachments, there are fields for phone number, email address, and other comments. At the bottom, there are buttons for "CLIENT HAS BEEN CONTACTED", "CLIENT UNREACHABLE", "DECLINE CASE", "EMAILING THE AGENT", and "CLOSE CASE". A large "Click!" button with an arrow points to the "Upload satisfaction feedback form" button.

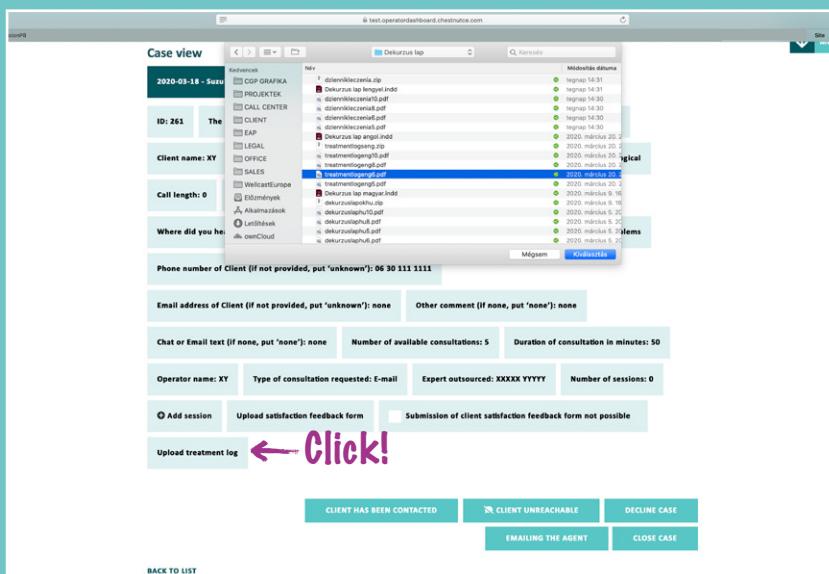
Closing a case - Uploading the client satisfaction feedback from

Cases may be closed after:

1. The „Contact client” button has been pressed;
2. At least one appointment has been registered in the case profile;
3. The treatment log / case file has been uploaded;
4. The client satisfaction feedback form has been uploaded, or the client satisfaction score has been submitted (there is no feedback form for legal and financial cases, but a score has to be entered);
5. In the absence of the client satisfaction survey, the „Submission of client satisfaction feedback form is not possible” box has been checked.

Provided that these requirements are fulfilled, you can close cases by clicking „Close case”.

You can download the client satisfaction feedback form in PDF format from the „Satisfaction Feedback form” menu of Experts’ Dashboard.



This screenshot is identical to the one above, showing the "Case view" page for case ID 261. It includes the same sidebar, attachment list, and bottom buttons. A large "Click!" button with an arrow points to the "Upload treatment log" button.

Closing a case - Uploading treatment log / case file

Treatment logs have to be uploaded for psychological cases, while case files have to be uploaded for health coaching counselling (personal trainer, nutritionist, life coach).

The treatment log can be downloaded in PDF format from the „Treatment log” menu of Experts’ Dashboard. The case file can be downloaded in PDF format from the „Case file” menu of Experts’ Dashboard.

5. Notifications - Ongoing cases

Date	Case Details	Status Bar
2020-02-17	Company name - Expert name - Type of case - City - Nickname	Approval pending
2020-02-17	Company name - Expert name - Type of case - City - Nickname	2 months
2020-02-17	Company name - Expert name - Type of case - City - Nickname	5 days
2020-02-17	Company name - Expert name - Type of case - City - Nickname	24 hours
2020-02-17	Company name - Expert name - Type of case - City - Nickname	Case declined
2020-02-17	Company name - Expert name - Type of case - City - Nickname	Client unreachable

Approval pending

The case is closed, approval is pending.

2 months

Two months have passed since the day of the first appointment, but the case has not been closed yet. Cases have to be closed within three months.

5 days

The time of the first appointment has not yet been registered 5 days after the client had been contacted.

24 hours

Out of the available 48, 24 hours have passed, and the client has not been contacted yet.

Case declined

I'm unable to accept the case, please reassign it to another expert.

Client unreachable

Please close the case, as the client could not be reached.

Under „Cases in progress”, you will find cases assigned to you that have not been closed yet, i.e. the counselling is ongoing.

These are listed in the menu in „case bars”—You can open the profile of any given case by clicking „Select” next to it.

Notifications are also displayed next to the case bars, giving information on relevant events that have happened since the assignment of the case.

Case bars have so-called „status bars”—these indicate the progress of a given case regarding the counselling process.

Status bar key:

1/3 status bar: The client has been contacted.

2020-02-17 - Company name - Expert name - Type of case - City - Nickname

2/3 status bar: The counselling appointment(s) has/have been registered.

2020-02-17 - Company name - Expert name - Type of case - City - Nickname

3/3 status bar: The client satisfaction survey and treatment log / case file have been uploaded, or the client satisfaction score has been submitted. The case may be closed.

2020-02-17 - Company name - Expert name - Type of case - City - Nickname

With a 3/3 status bar, CGP is notified of the closed case and approves it so that the case can be invoiced. Only cases with a 3/3 status bar may be closed, approved and invoiced. Following approval, the case profile is automatically transferred to the „Closed cases” menu.