

Agents' Dashboard Guide

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1. Creating an account for the site

operatordashboard.chestnutce.com

FusionPBX Google Fonts iPad - Apple (iU) YouTube cgeurope/operator: Operator program for CGP Europe -... Operator Site

CGP
CHESTNUT GLOBAL PARTNERS
EUROPE
A Morneau Shepell Joint Venture

Agents' Dashboard

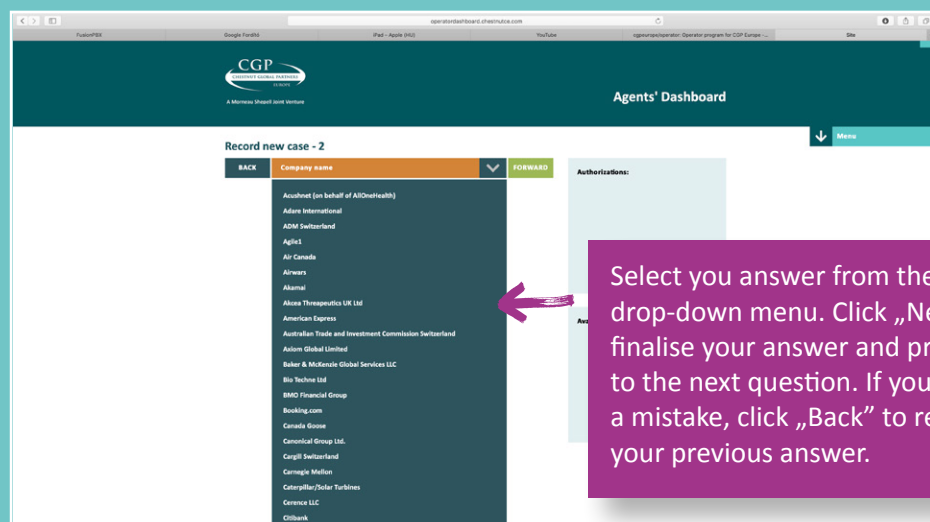
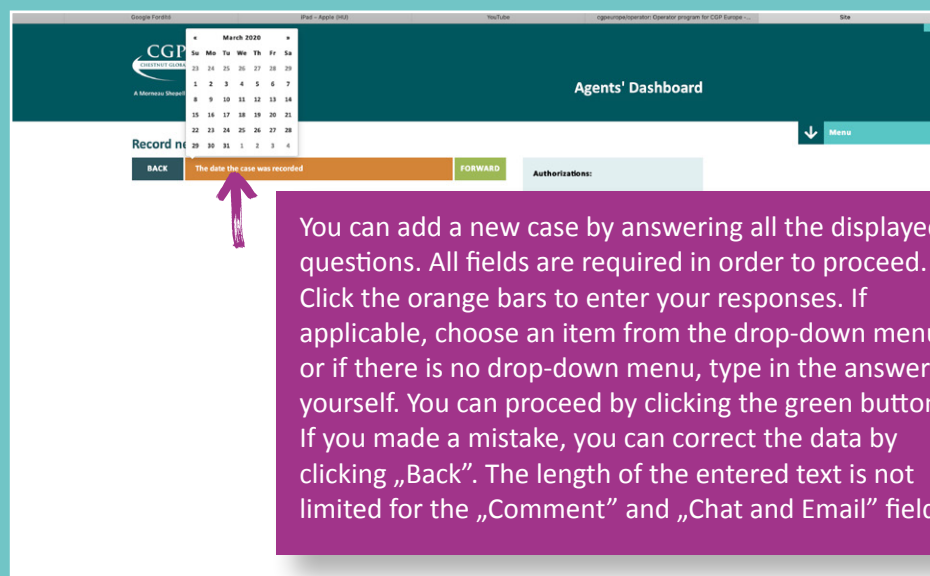
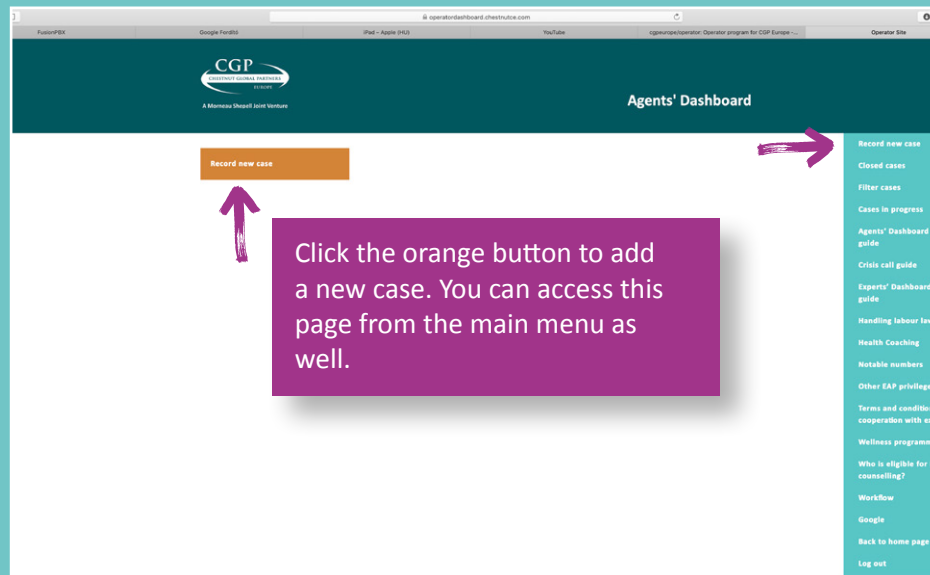
Username

Password

Login

We automatically create an account for everyone, so you don't need to sign up separately. Your username and password will be sent to you via email. Only we can change or delete them.

2. Adding new cases



Record new case - 17

BACK Other comment (if none, put 'none') FORWARD

Authorizations:

- Psychological
Skype/Phone/Personal
3 occasion(s) / 30 minutes
- Legal
Phone
1 occasion(s) / 30 minutes
- Financial
Phone
1 occasion(s) / 30 minutes

Available experts:

- Ela Amarie
- Patricia Rizzo

The length of the entered text is not limited for the „Comment” and „Chat and Email” fields.

Permissions are displayed automatically when you select the company name. You can check the appointment and duration details for any given question here.

A list of available experts is displayed automatically after you have selected the city and the type of the issue.

CASE SUCCESSFULLY RECORDED

Record new case

Summarization:

The date the case was recorded : 2020-09-24
 Company name : Airwars
 Was it a crisis call? No
 Client first name (if not provided, put 'unknown') : XC
 City of consultation : Zurich
 Place of receipt : Telephone
 Type of problem : Psychological
 Call length : 5
 Employee / Family Member : Family Member
 Male / Female : Female
 Age : between 20 and 29
 Where did you hear about the program? SAP media, poster
 Was it a backup call? No
 Problem details : Child custody
 Phone number of Client (if not provided, put 'unknown') : 30 60 111 1111
 Email address of Client (if not provided, put 'unknown') : xxx@yyy.com
 Other comment (if none, put 'none') : none
 Chat or Email text (if none, put 'none') : none
 Number of available consultations : 3
 Duration of consultation in minutes : 50
 Operator name : Marcelle
 Type of consultation requested : Personal

Authorizations:

- Psychological
Skype/Phone/Personal
3 occasion(s)
- Legal
Phone
1 occasion(s)
- Financial
Phone
1 occasion(s)

Available experts:

- Ela Amarie Emailing the expert
- Patricia Rizzo Emailing the expert

After the last question, a summary of the added case is displayed. You can check all the details here before assigning it to someone.

3. Assigning cases

CASE SUCCESSFULLY RECORDED

Record new case

Summarization:

The date the case was recorded : 2020-09-24
 Company name : Airwars
 Was it a crisis call? No
 Client first name (if not provided, put 'unknown') : XC
 City of consultation : Zurich
 Place of receipt : Telephone
 Type of problem : Psychological
 Call length : 5
 Employee / Family Member : Family Member
 Male / Female : Female
 Age : between 20 and 29
 Where did you hear about the program? SAP media, poster
 Was it a backup call? No
 Problem details : Child custody
 Phone number of Client (if not provided, put 'unknown') : 30 60 111 1111
 Email address of Client (if not provided, put 'unknown') : xxx@yyy.com
 Other comment (if none, put 'none') : none
 Chat or Email text (if none, put 'none') : none
 Number of available consultations : 3
 Duration of consultation in minutes : 50
 Operator name : Marcelle
 Type of consultation requested : Personal

Authorizations:

- Psychological
Skype/Phone/Personal
3 occasion(s)
- Legal
Phone
1 occasion(s)
- Financial
Phone
1 occasion(s)

Available experts:

- Ela Amarie Emailing the expert
- Patricia Rizzo Emailing the expert

Select an expert from the listed options, click „Emailing the expert”, and the case has been assigned. The expert will receive an automatically generated email with your signature, addressed to them personally, containing a link with the details of the case.

4. Editing case details before assigning a case

Agents' Dashboard

CASE SUCCESSFULLY RECORDED
Record new case

Summarization:
The date the case was recorded : 2020-03-24
Company name : Airwars
Was it a crisis call? No
Client first name (if not provided, put 'unknown') : XC
City of consultation : Zurich
Place of receipt : Telephone
Type of problem : Psychological
Call length : 5
Employee / Family Member : Family Member
Male / Female : Female
Age : between 20 and 29
Where did you hear about the program? EAP media, poster
Was it a backup call? No
Problem details : Child custody
Phone number of Client (if not provided, put 'unknown') : 30 60 111 1111
Email address of Client (if not provided, put 'unknown') : xxxx@yyyyy.com
Other comment (if none, put 'none') : none
Chat or Email text (if none, put 'none') : none
Number of available consultations : 3
Duration of consultation in minutes : 50
Operator name : Marcelle
Type of consultation requested : Personal

Authorizations:
Psychological
Skype/Phone/Personal
3 occasion(s)
Legal
Phone
1 occasion(s)
Financial
Phone
1 occasion(s)

Available experts:
Ela Amarie
Patrizia Rizzo
Emailing the expert
Emailing the expert

Menu

Have you made a mistake? No problem. You can edit cases that have been added. Click „Ongoing cases”.

Agents' Dashboard

Cases in progress

2020-03-24 - Airwars - - Psychological - Zurich - XC **SELECT**

Select the case you want to edit from the list.

Case view
2020-03-24 - Airwars - - Psychological - Zurich - XC

Status: 0 | ID: 301 | The date the case was recorded : 2020-03-24

Was it a crisis call?: No

Place of receipt: Telephone | Type of problem: Psychological

Employee / Family Member: Family Member | Male / Female: Female

Where did you hear about the program?: EAP media, poster

Phone number of Client (if not provided, put 'unknown'): 30 60 111 1111

Email address of Client (if not provided, put 'unknown'): xxxx@yyyyy.com | Other comment (if none, put 'none'): none

Chat or Email text (if none, put 'none'): none | Number of available consultations: 3

Duration of consultation in minutes: 50 | Operator name: Marcelle

Outsource new expert

BACK TO LIST

You can view the case profile after clicking. You can edit the fields marked by a small pencil icon. Click the field to edit. For questions with drop-down menus, select an alternative item from the drop-down menu. For questions with text fields, enter the new answer yourself. Fields without the pencil icon cannot be edited. Click „Save” when you are done, then assign the case to someone, as it hasn't been assigned yet.

Click this field, select an expert from the drop-down menu, click „Save”, and the case has been assigned.

5. Editing case details after a case has been assigned

Agents' Dashboard

CASE SUCCESSFULLY RECORDED

[Record new case](#)

Summary:

The date the case was recorded : 2020-03-24
Company name : Airwars
Was it a crisis call? No
Client first name (if not provided, put 'unknown') : NC
City of consultation : Zurich
Place of receipt : Telephone
Type of problem : Psychological
Call length : 5
Employee / Family Member : Family Member
Male / Female : Female
Age : between 20 and 29
Where did you hear about the program? EAP media, poster
Was it a backup call? No
Problem details : Child custody
Phone number of Client (if not provided, put 'unknown') : 30 60 111 1111
Email address of Client (if not provided, put 'unknown') : xxxx@yyyyy.com
Other comment (if none, put 'none') : none
Chat or Email text (if none, put 'none') : none
Number of available consultations : 3
Duration of consultation in minutes : 50
Operator name : Marcelle
Type of consultation requested : Personal

Authorizations:

Psychological
Skype/Phone/Personal
3 occasion(s)
Legal
Phone
1 occasion(s)
Financial
Phone
1 occasion(s)

Available experts:

Ela Amarie
Patrizia Rizzo

Emailing the expert
Emailing the expert

[Menu](#)

Have you made a mistake? No problem. You can edit cases that have been added or assigned. Click „Ongoing cases“.

Agents' Dashboard

Cases in progress

2020-03-24 - Airwars - - Psychological - Zurich - NC [SELECT](#)

Select the case you want to edit from the list.

Case view

2020-03-24 - Airwars - - Psychological - Zurich - NC

Status: 01 ID: 301 ☒ The date the case was recorded: 2020-03-24 14:09

☒ Was it a crisis call? No ☒ Client first name (if not provided, put 'unknown') : NC

☒ Place of receipt: Telephone ☒ Type of problem: Psychological ☒ Call length: 5

☒ Employee / Family Member: Family Member ☒ Male / Female: Female

☒ Where did you hear about the program? EAP media, poster ☒ Was it a backup call? No

☒ Phone number of Client (if not provided, put 'unknown'): 30 60 111 1111

☒ Email address of Client (if not provided, put 'unknown'): xxxx@yyyyy.com ☒ Other comment (if none, put 'none') : none

☒ Chat or Email text (if none, put 'none') : none ☒ Number of available consultations: 3

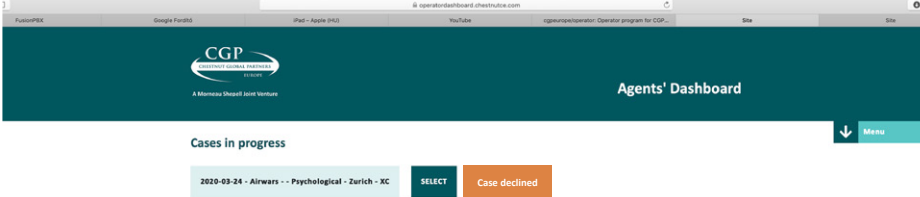
☒ Duration of consultation in minutes: 50 ☒ Operator name: Marcelle ☒ Type of consultation requested: Personal

[Outsource new expert](#)

[BACK TO LIST](#)

You can view the case profile after clicking. You can edit the fields marked by a small pencil icon. Click the field to edit. Edited data will be automatically updated on the profile of the expert as well, i.e. they see what you see, so you don't have to write an email about it. Just edit the data here, and they will be updated for the expert as well.

6. Reassigning declined cases to new experts

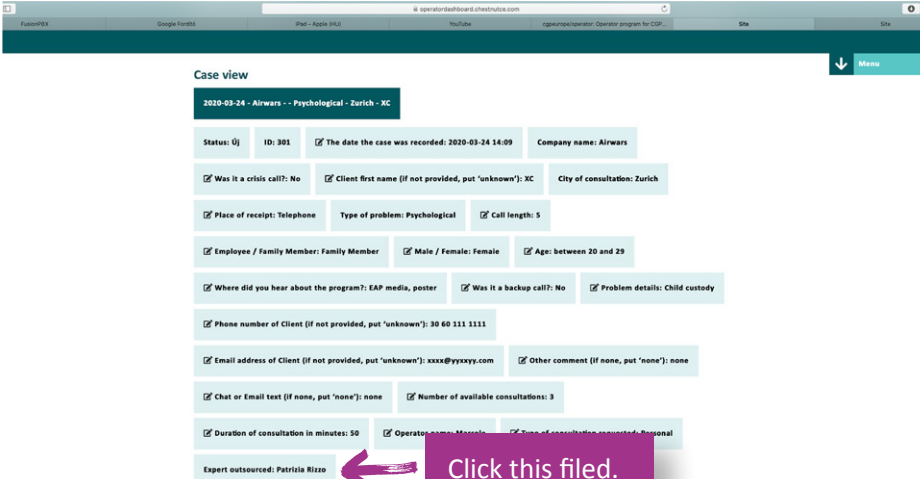


Agents' Dashboard

Cases in progress

2020-03-24 - Airwars - - Psychological - Zurich - XC **SELECT** Case declined

Did the expert decline the case?
No problem. You can reassign the case with the click of a button.
Click the case in question.



Case view

2020-03-24 - Airwars - - Psychological - Zurich - XC

Status: 0 | ID: 301 | The date the case was recorded: 2020-03-24 14:09 | Company name: Airwars

Was it a crisis call?: No | Client first name (if not provided, put 'unknown'): XC | City of consultation: Zurich

Place of receipt: Telephone | Type of problem: Psychological | Call length: 5

Employee / Family Member: Family Member | Male / Female: Female | Age: between 20 and 29

Where did you hear about the program?: EAP media, poster | Was it a backup call?: No | Problem details: Child custody

Phone number of Client (if not provided, put 'unknown'): 30 60 111 1111

Email address of Client (if not provided, put 'unknown'): xxxx@yyyyy.com | Other comment (if none, put 'none'): none

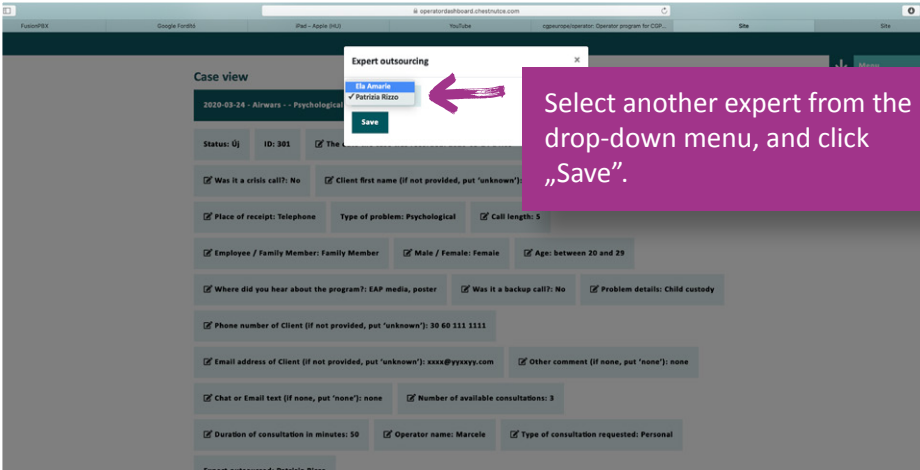
Chat or Email text (if none, put 'none'): none | Number of available consultations: 3

Duration of consultation in minutes: 50 | Operator name: Marcelle | Type of consultation requested: Personal

Expert outsourced: Patrizia Rizzo

Click this filed.

BACK TO LIST



Case view

2020-03-24 - Airwars - - Psychological

Status: 0 | ID: 301 | The date the case was recorded: 2020-03-24 14:09 | Company name: Airwars

Was it a crisis call?: No | Client first name (if not provided, put 'unknown'): XC | City of consultation: Zurich

Place of receipt: Telephone | Type of problem: Psychological | Call length: 5

Employee / Family Member: Family Member | Male / Female: Female | Age: between 20 and 29

Where did you hear about the program?: EAP media, poster | Was it a backup call?: No | Problem details: Child custody

Phone number of Client (if not provided, put 'unknown'): 30 60 111 1111

Email address of Client (if not provided, put 'unknown'): xxxx@yyyyy.com | Other comment (if none, put 'none'): none

Chat or Email text (if none, put 'none'): none | Number of available consultations: 3

Duration of consultation in minutes: 50 | Operator name: Marcelle | Type of consultation requested: Personal

Expert outsourced: Patrizia Rizzo

Expert outsourcing

Patrizia Rizzo

Save

Select another expert from the drop-down menu, and click „Save“.

BACK TO LIST

Case view

2020-03-24 - Airwars - Psychological - Zurich - XC

Status: 0j ID: 301 ☒ The date the case was recorded: 2020-03-24 14:09 Company name: Airwars

☒ Was it a crisis call?: No ☒ Client first name (if not provided, put 'unknown'): XC City of consultation: Zurich

☒ Place of receipt: Telephone Type of problem: Psychological ☒ Call length: 5

☒ Employee / Family Member: Family Member

☒ Where did you hear about the program?: EAP media, p

☒ Phone number of Client (if not provided, put 'unknown')

☒ Email address of Client (if not provided, put 'unknown')

☒ Chat or Email text (if none, put "none"): none

☒ Duration of consultation in minutes: 50 ☒ Oper

Expert outsourced: Ela Amarie

BACK TO LIST

The new expert is displayed in the data field now. They will be sent an automatically generated email, while the case profile will be automatically deleted for the previous expert.

7. Ongoing cases

The „Case declined” notification informs you about the expert having declined the case you assigned to them. In this case, you have to reassign the given case to someone else immediately. The case will be deleted for the previous expert automatically.

Agents' Dashboard

Case declined

24 hours

2020-03-22 - Autoliv - Munkajog Márton - Labor Law - Budapest - - SELECT

2020-03-21 - Autoliv - Munkajog Márton - Labor Law - Budapest - - SELECT

Ongoing cases are cases that you have assigned to an expert, but where the expert has not started the counselling yet. Notifications may appear next to ongoing cases. E.g. „Case declined” or „24 hours”, which means that the expert has failed to contact the client for 24 hours. In this case, call the expert, ask about the reasons for that, and if necessary, reassign the case to another expert. Make sure you notify the previous expert via email about the reasons why the case has been reassigned to someone else.

CGP

Agents' Dashboard

Cases in progress

2020-03-24 - Unicredit Bank - Sierfics Péter - Psychological - Budapest - P... SELECT Client unreachable

2020-03-24 - Desso - Gubán Magdolna - Financial - Budapest - Krisztián SELECT

2020-03-23 - Stadler - Dr. Sőja Szabolcs - Labor Law - Budapest - János SELECT

2020-03-23 - CIB Bank - Egyéb Elemér - Other - Sopron - - SELECT

2020-03-23 - Cargill Magyarország - Somogyi-Kovács Anita - Health Coach... SELECT 5 days

2020-03-23 - Provident - Dr. Sőja Szabolcs - Labor Law - Budapest - István SELECT

2020-03-22 - Suzuki - Munkajog Márton - Labor Law - Budapest - Guba SELECT

2020-03-22 - Autoliv - Munkajog Márton - Labor Law - Budapest - - SELECT

2020-03-21 - Autoliv - Munkajog Márton - Labor Law - Budapest - - SELECT

The darker colour displayed in the bar of a given case indicates that the expert has contacted the client. Case bars without this darker colour signal that the client has not been contacted yet.

The client could not be reached. CGP Europe will close the case.

The „5 days” notification means that the expert has contacted the client (also indicated by the darker bar) but has still not added the time of the first session to the case profile after 5 days. In this case, notify the expert to do it as soon as possible.

8. Closed cases

Agents' Dashboard

Closed cases

2020-03-23

The date the case was recorded: 2020-03-23
Company name: Henkel
Was it a crisis call?: Yes
Client first name (if not provided, put 'unknown'): István
City of consultation: Tübingen
Place of receipt: Telephone
Type of problem: Psychological
Call length: 10 min
Employee / Family Member: Employee
Male / Female: Female
Age: between 30 and 39
Where did you hear about the program?: EAP
media, poster
Was it a backup call?: No
Problem details: Health-related problem
Phone number of Client (if not provided, put 'unknown'): nincs
Email address of Client (if not provided, put 'unknown'): nincs
Other comment (if none, put 'none'): Krisis hívásként indult, és telefonos tanácsadában folytatódott (Születési dátus: 1980)
Chat or Email text (if none, put 'none'): nincs
Number of available consultations: 5
Duration of consultation in minutes: 50
Operator name: Andi
Type of consultation requested: Telephone
Expert outsourced: Szilvits Zsuzsa

2020-03-23

The date the case was recorded: 2020-03-23
Company name: CIB Bank
Was it a crisis call?: No
Client first name (if not provided, put 'unknown'): Angéla
City of consultation: Budapest
Place of receipt: Telephone
Type of problem: Legal
Call length: 3 perc
Employee / Family Member: Employee
Male / Female: Female
Age: between 30 and 39
Where did you hear about the program?: Manager / Superior
Was it a backup call?: No
Problem details: Property rights
Phone number of Client (if not provided, put 'unknown'): 06 30 300 1368
Email address of Client (if not provided, put 'unknown'): nincs
Other comment (if none, put 'none'): Ingatlan adásvételi kapcsolatban szeretne az ügyfél tanácsadást. A hitelbírálat is folyamatban van. A kérdése az, hogy szívesen-e bármilyen változásra a jelen körülmények között.
Chat or Email text (if none, put 'none'): nincs
Number of available consultations: 3
Duration of consultation in minutes: 50
Operator name: Andi

2020-03-2

The date the case was recorded: 2020-03-2
Company name: CIB Bank
Was it a crisis call?: No
Client first name (if not provided, put 'unknown'): Angéla
City of consultation: Budapest
Place of receipt: Telephone
Type of problem: Legal
Call length: 3 perc
Employee / Family Member: Employee
Male / Female: Female
Age: between 30 and 39
Where did you hear about the program?: Manager / Superior
Was it a backup call?: No
Problem details: Property rights
Phone number of Client (if not provided, put 'unknown'): 06 30 300 1368
Email address of Client (if not provided, put 'unknown'): nincs
Other comment (if none, put 'none'): Ingatlan adásvételi kapcsolatban szeretne az ügyfél tanácsadást. A hitelbírálat is folyamatban van. A kérdése az, hogy szívesen-e bármilyen változásra a jelen körülmények között.
Chat or Email text (if none, put 'none'): nincs
Number of available consultations: 3
Duration of consultation in minutes: 50
Operator name: Andi

Every case where the expert has added the time of the first appointment to the case profile is automatically transferred to the closed cases. A case profile only gets cleared from this menu after the given case has been approved by CGP Europe. It stays here among closed cases while waiting for approval, but no further action is required on your part.

9. Other menu items

Agents' Dashboard

Crisis call guide

What happens during a crisis call and what do you have to do?

When a client in crisis calls the programme, they are able to forward their own call to a psychologist handling crisis calls before the call gets through to you. After the GDPR policy audio, which the client accepts by pressing number one, they will hear a note about crisis calls—by pressing 5 or 6 (depending on the given country) at this point, the client can automatically forward the call to a psychologist handling crisis calls. The psychologist will later write an email about the details of the case to you. Your job is to add this case to the dashboard as a crisis case, and assign it to the psychologist from whom you received the email. In some countries more than one psychologists attend crisis lines, so do not assign the case automatically, but always check who sent the email about the case to you. After that, the psychologist will decide whether the client needs further counselling or not.

– If no further counselling is necessary, they will close the case in the dashboard. Your job is finished.

– If the client needs further counselling, the psychologist might take on the case themselves. Your job is finished.

– If the client needs further counselling, but the psychologist is unable to take on the case—of which you will be notified via email—, you have to reassign the case to another expert in the dashboard in the usual way.

Countries where clients have the option to forward their own crisis call to a psychologist:

Hungary
Romania
Switzerland
Poland
Czech Republic

What happens if the client doesn't forward their own call to a psychologist, and you answer the call? (The following countries where clients don't have the option to forward their own call to a psychologist handling crisis calls.)

1. Ask for the client's phone number and assure them that a psychologist will call them in a matter of minutes. Hang up, call the client back, give them the client's phone number and tell them that it is a crisis call, so they have to call back the client immediately.

Informational material previously accessible in the owncloud library can now be accessed here as well, as menu items. You can continue to use the owncloud library, but gradually, it will be replaced entirely by this page.

Agents' Dashboard

Terms and conditions of the cooperation with experts

Cases may only be assigned through Experts' Dashboard.

The contact established with the client has to be confirmed in the case profile within 48 hours after receiving the email notification of the assigned case, or if the expert is unable to accept the case, they have the same amount of time, i.e. 48 hours to decline the case, also in the case profile (weekends don't count).

If the client doesn't respond even after 3 phonecalls and 1 text message, the case has to be closed by clicking on the 'Client unreachable' button.

The times of the counselling appointments with the client must be registered in the case profile, for any kind of personal, phone, email or skype sessions. Every session has to be registered separately through the 'Add appointment' option in the case profile.

Psychologists must upload the scanned client satisfaction survey and treatment log to the case profile, while legal and financial experts must submit a client satisfaction score. Without these, the case cannot be closed, so it cannot be invoiced either. If the client could not fill out a client satisfaction survey for any reason, the 'Submission of client satisfaction survey not possible' box has to be checked before the case can be closed.

We are only able to accept scanned and digital invoices sent in email to finance@chestnutice.com. Emails regarding invoicing should also be sent to that address.

Counselling has to start within five days and end within three months after the client has been contacted. The counselling may only start later than five days after contacting the client if the client cannot offer a time within the five-day period, but even then, the time of the first appointment has to be arranged and its time registered in the case profile within five days. In other words, the time of the first appointment has to be registered in the case profile within five days, whether the appointment itself will happen within five days or not.