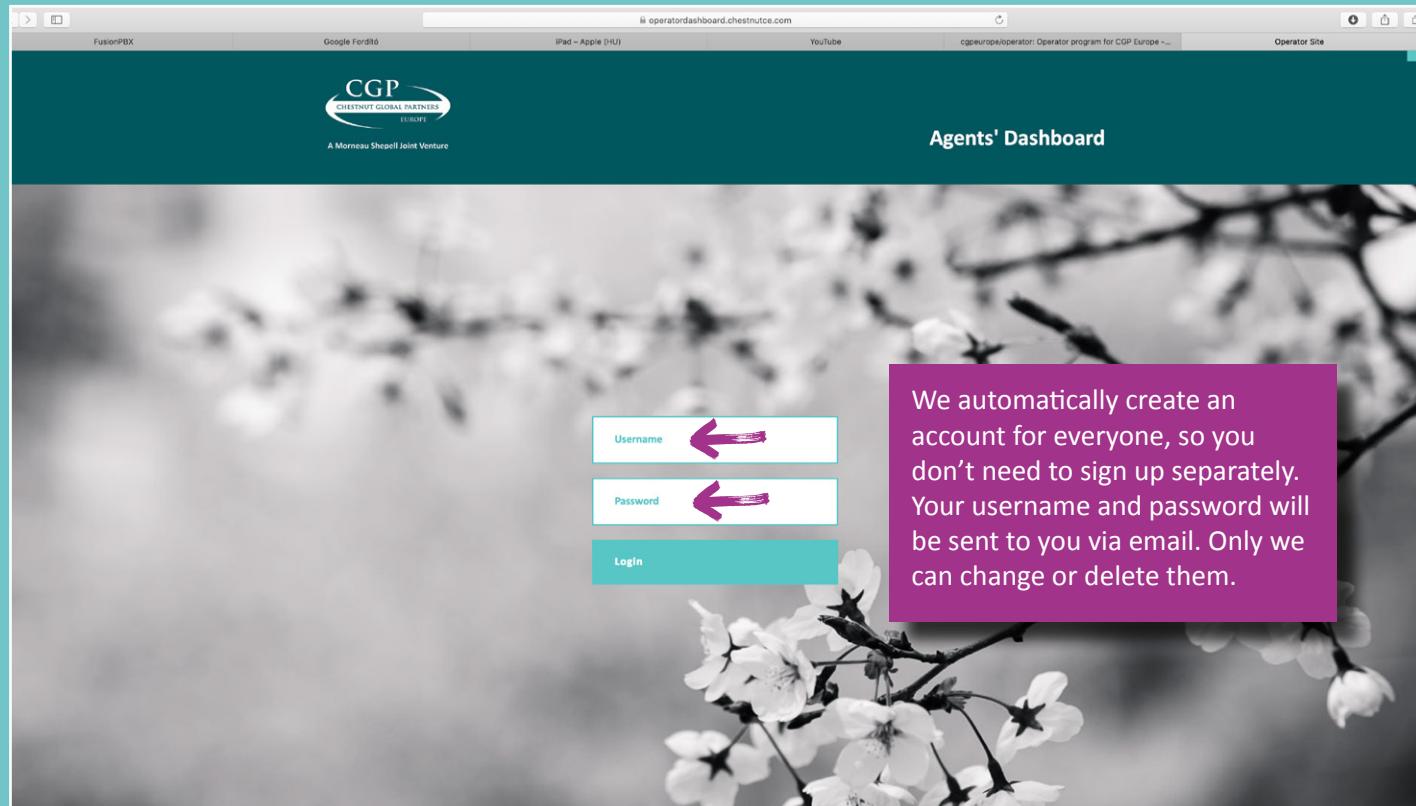


# Agents' Dashboard Guide

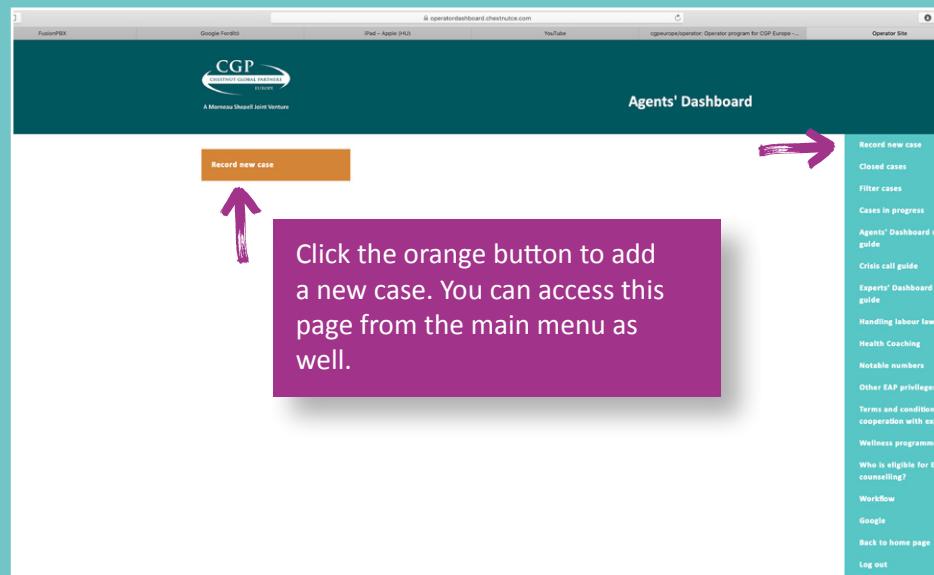
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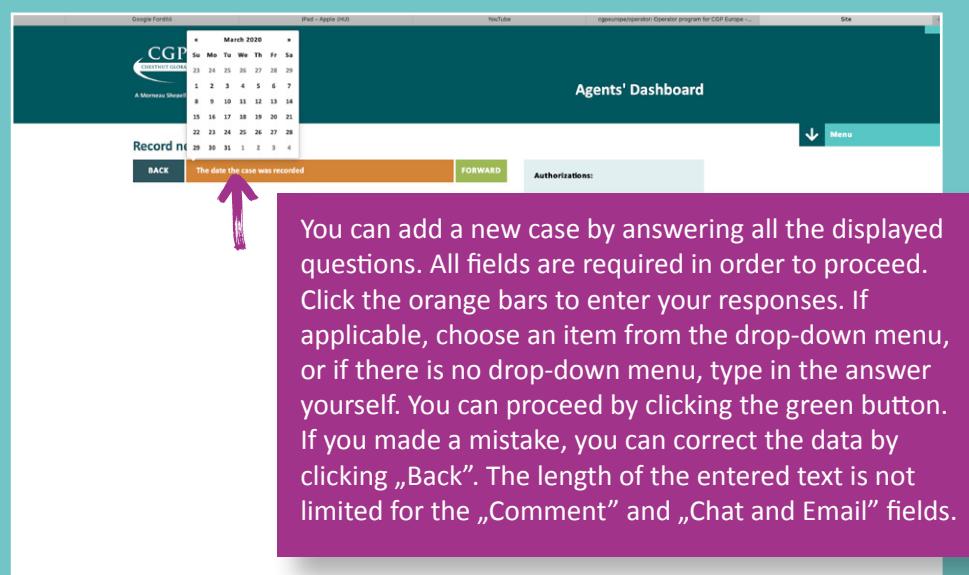
### 1. Creating an account for the site



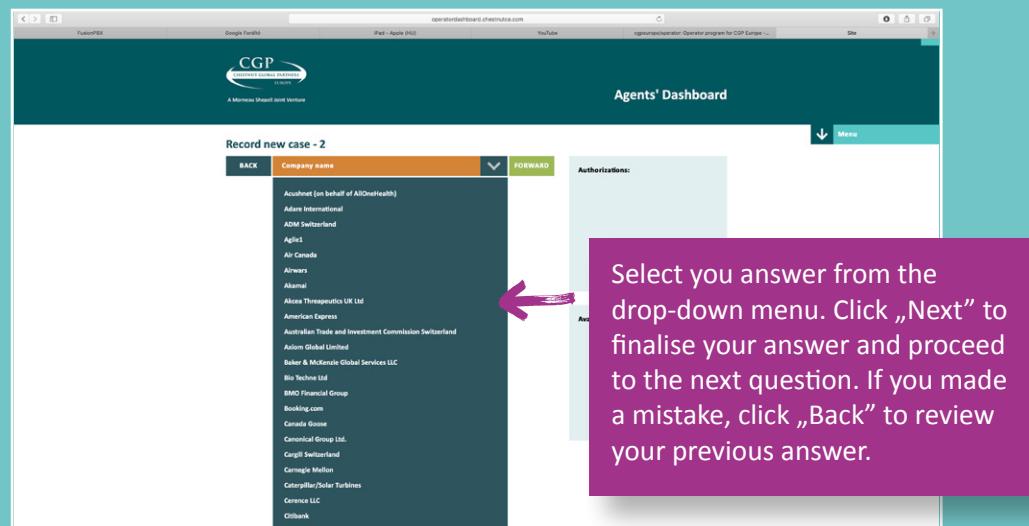
## 2. Adding new cases



A screenshot of the CGP Agents' Dashboard. At the top right, there is a vertical menu with various links such as 'Record new case', 'Closed cases', 'Filter cases', etc. In the center, there is a large orange button labeled 'Record new case'. A pink arrow points upwards from the bottom of the page towards this button. A pink box contains the text: 'Click the orange button to add a new case. You can access this page from the main menu as well.'



A screenshot of the 'Record new case' form. At the top, there is a date picker set to March 2020. Below it, there is an orange bar with the text 'The date the case was recorded'. A pink arrow points upwards from the bottom of the page towards this bar. A pink box contains the text: 'You can add a new case by answering all the displayed questions. All fields are required in order to proceed. Click the orange bars to enter your responses. If applicable, choose an item from the drop-down menu, or if there is no drop-down menu, type in the answer yourself. You can proceed by clicking the green button. If you made a mistake, you can correct the data by clicking „Back“. The length of the entered text is not limited for the „Comment“ and „Chat and Email“ fields.'



A screenshot of the 'Record new case - 2' step. On the left, there is a dropdown menu with a list of company names. A pink arrow points upwards from the bottom of the page towards this menu. A pink box contains the text: 'Select your answer from the drop-down menu. Click „Next“ to finalise your answer and proceed to the next question. If you made a mistake, click „Back“ to review your previous answer.'

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.

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

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

The screenshot shows the 'Agents' Dashboard' interface. At the top left, there's a green button labeled 'CASE SUCCESSFULLY RECORDED'. Below it is an orange button labeled 'Record new case'. The main area contains several sections: 'Summarization' (listing details like date, company name, client first name, etc.), 'Authorizations' (listing psychological, legal, financial, and phone authorizations), and 'Available experts' (listing Ela Amarie and Patricia Rizzo with their contact options). A large purple arrow points upwards from the bottom right towards the dashboard header.

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

The screenshot shows the 'Agents' Dashboard' with a section titled 'Cases in progress'. It lists a single case entry: '2020-03-24 - Airwars - Psychological - Zurich - XC'. To the right of this entry is a blue 'SELECT' button. A large purple arrow points from the bottom right towards this 'SELECT' button. A pink box highlights the 'SELECT' button.

Select the case you want to edit from the list.

The screenshot shows the 'Case view' page for the case '2020-03-24 - Airwars - Psychological - Zurich - XC'. The page displays various case details in a form-like structure with input fields. Several fields have small pencil icons indicating they are editable. A large purple arrow points from the bottom right towards the 'Outsource new expert' field, which has a radio button next to it. A pink box highlights this field.

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

**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 60 111 111  
 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 : Marcole  
 Type of consultation requested : Personal

**Authorizations:**

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

**Available experts:**

Ela Amarie Emailing the expert  
 Patricia Rizzo Emailing the expert

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

**Cases in progress**

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

Select the case you want to edit from the list.

**Case view**

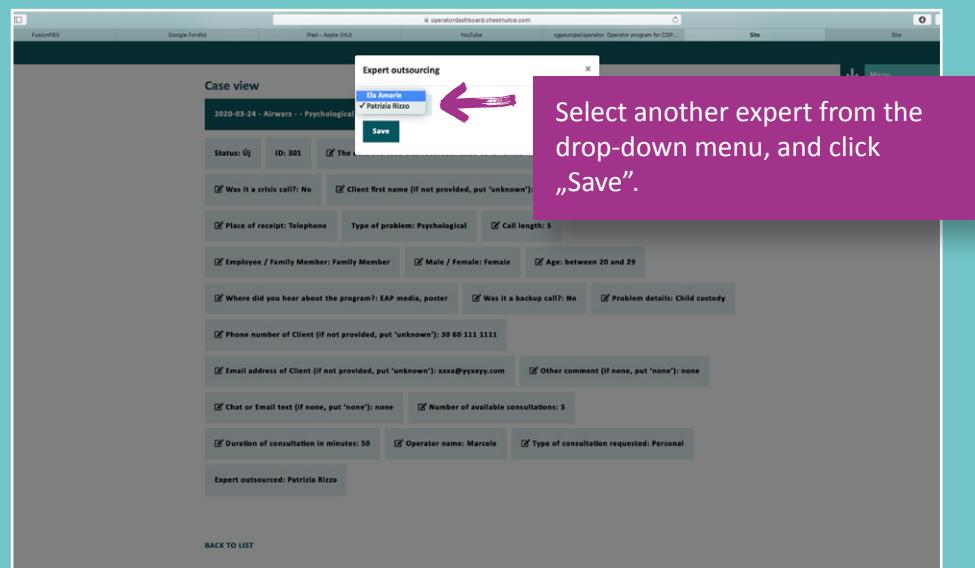
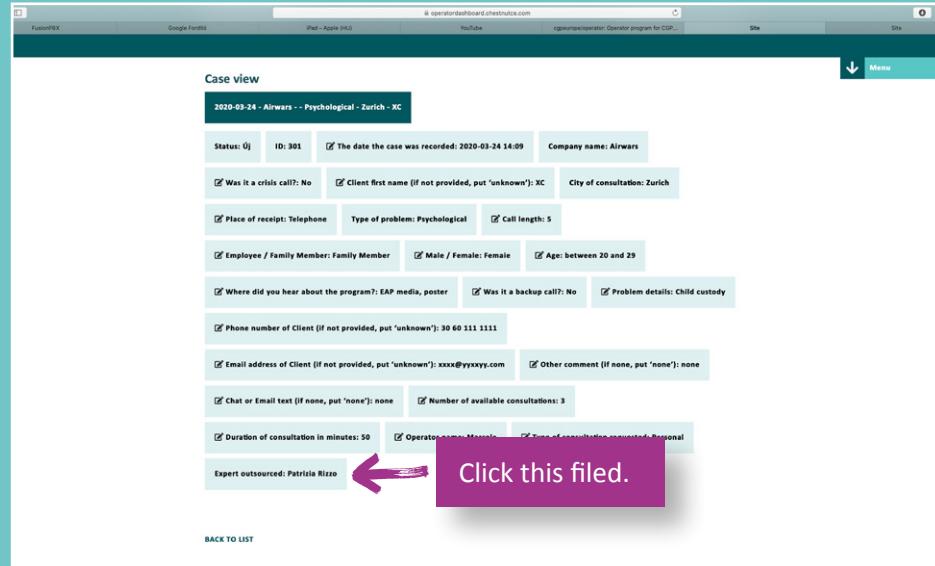
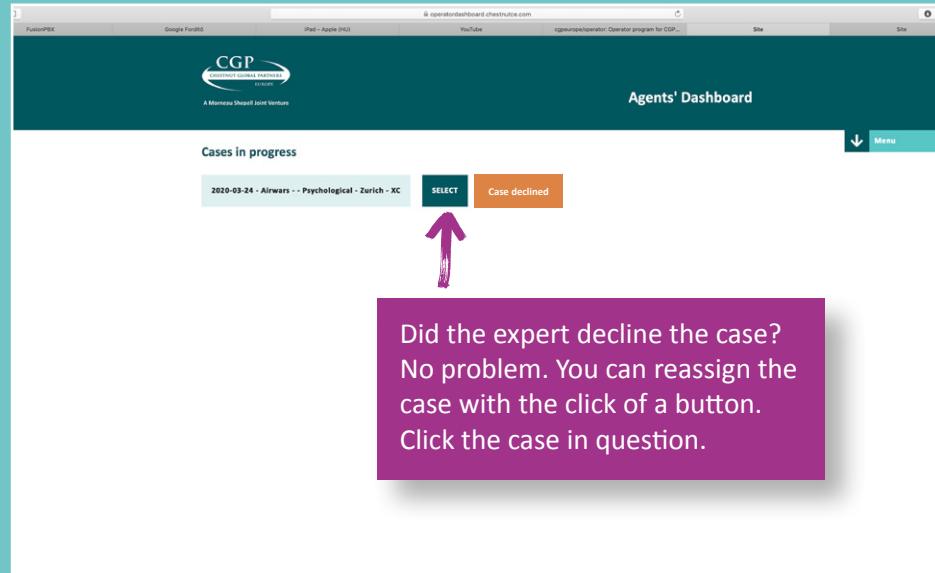
2020-03-24 - Airwars - - Psychological - Zurich - XC

Status: <input type="text" value="Üj"/>	ID: 301	Was the date the case was recorded: <input type="text" value="2020-03-24 16:09"/>
<input type="checkbox"/> Was it a crisis call? No	<input type="checkbox"/> Client first name (if not provided, put 'unknown')	<input type="checkbox"/> Was it a backup call? No
<input type="checkbox"/> Place of receipt: Telephone	Type of problem: Psychological	<input type="checkbox"/> Call length: 5
<input type="checkbox"/> Employee / Family Member: Family Member	<input type="checkbox"/> Number of available consultations: 3	<input type="checkbox"/> Other comment (if none, put 'none'): none
<input type="checkbox"/> Where did you hear about the program? EAP media, poster	<input type="checkbox"/> Duration of consultation in minutes: 50	<input type="checkbox"/> Operator name: Marcole
<input type="checkbox"/> Phone number of Client (if not provided, put 'unknown'): 30 60 111 1111	<input type="checkbox"/> Chat or Email text (if none, put 'none'): none	<input type="checkbox"/> Type of consultation requested: Personal
<input type="checkbox"/> 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



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.

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.

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

The screenshot shows the 'Agents' Dashboard' interface. In the center, there is a table titled 'Closed cases' containing two rows of data. Each row represents a case profile with various details such as date, client name, problem type, and contact information.

2020-03-23	2020-03-23
<p>The date the case was recorded: 2020-03-23 Company name/Client: Képviselői bank Was it a backup call?: No Client first name (if not provided, put 'unknown'): Nincs City of consultation: Táplálézmárton Place of receipt: Telephone Type of problem: Psychological Call length: nem ismert Employee / Family Member: Employee Male / Female: Female Age: between 30 and 39 Where do you hear about the program?: EAP Media / Platform: nincs 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 contact info (if none, put 'none'): Rövid telefonszám, melyen tanácsadásra hivatkozhatunk, azaz telefonszám nincs 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: Skultet Zsuzsa</p>	<p>The date the case was recorded: 2020-03-23 Company name/Client: Bank Was it a backup call?: No Client first name (if not provided, put 'unknown'): Nincs 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 do you hear about the program?: Manage / Forward Media / Platform: nincs Was it a backup call?: No Problem details: Property rights Phone number of Client (if not provided, put 'unknown'): 06 30 300 1568 Email address of Client (if not provided, put 'unknown'): nincs Other contact info (if none, put 'none'): Ingatlan adóellenőrzéshez kapcsolatos személyzet A hívószám ahol elérhetők a teljesítők Chat or Email text (if none, put 'none'): nincs Number of available consultations: 3 Duration of consultation in minutes: 50 Operator name: nevem nincs Type of consultation requested: Telephone</p>

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

The screenshot shows the 'Crisis call guide' page. At the top, there is a navigation bar with a 'Menu' button. Below the header, there is a section titled 'What happens during a crisis call and what do you have to do?'. This section contains a bulleted list of instructions for handling crisis calls. Further down, there is a list of countries where clients have the option to forward their own crisis call to a psychologist, followed by a section on what to do if the client doesn't forward their call.

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.

The screenshot shows the 'Terms and conditions of the cooperation with experts' page. At the top, there is a navigation bar with a 'Menu' button. Below the header, there is a section titled 'Terms and conditions of the cooperation with experts'. This section contains detailed terms and conditions for cooperation, including sections on case assignment, contact confirmation, and appointment registration. It also specifies that only scanned and digital invoices sent to finance@chestnutce.com are accepted.