Experts' Dashboard Guide

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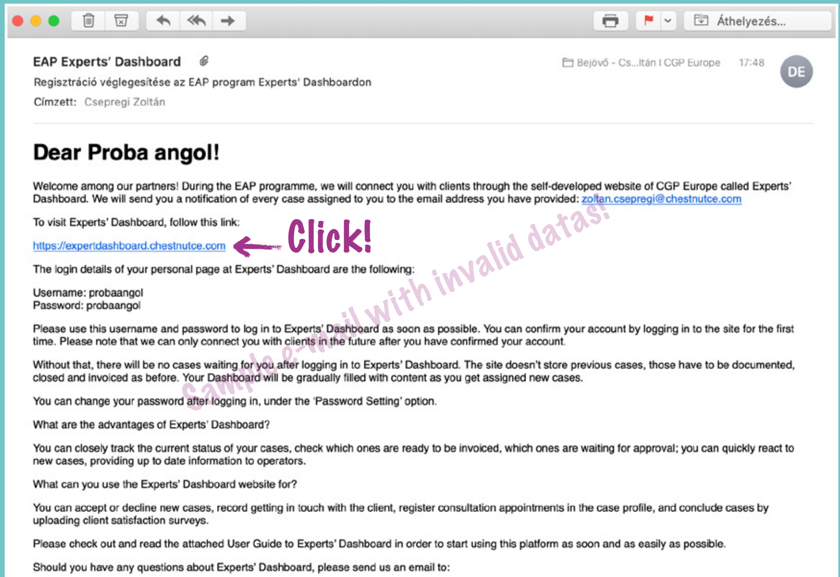

Áthelyezés...

EAP Experts' Dashboard
Regisztráció véglegesítése az EAP program Experts' Dashboardon
Címzett: Csepregi Zoltán
Bejövő - Cs...ltán I CGP Europe 17:48
DE

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@chestnutce.com

To visit Experts' Dashboard, follow this link:

https://expertdashboard.chestnutce.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.

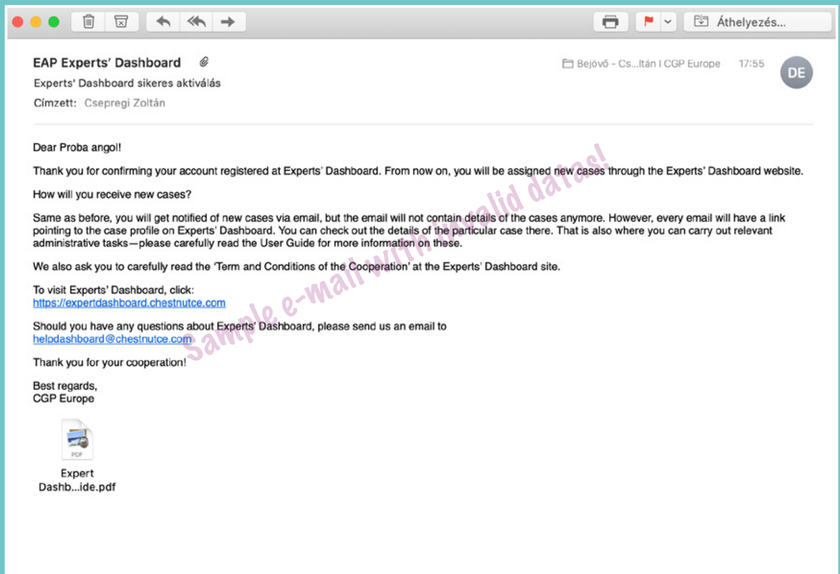
Please check out and read the attached User Guide to Experts' Dashboard in order to start using this platform as soon and as easily as possible.

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

Sample e-mail with invalid datas!

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.


Áthelyezés...

EAP Experts' Dashboard
Experts' Dashboard sikeres aktiválás
Címzett: Csepregi Zoltán
Bejövő - Cs...ltán I CGP Europe 17:55
DE

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.chestnutce.com

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

Thank you for your cooperation!

Best regards,
CGP Europe

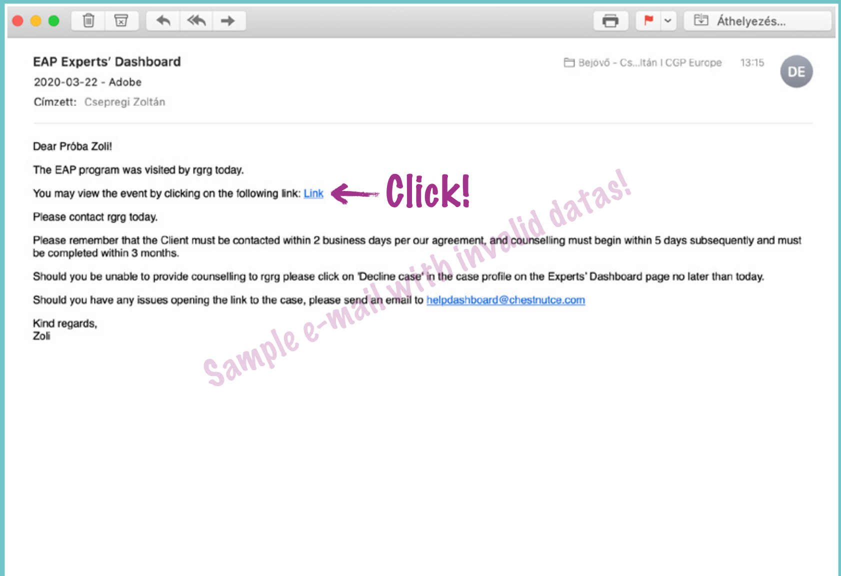
Expert Dashb...ide.pdf

Sample e-mail with invalid datas!

Successful activation of your account

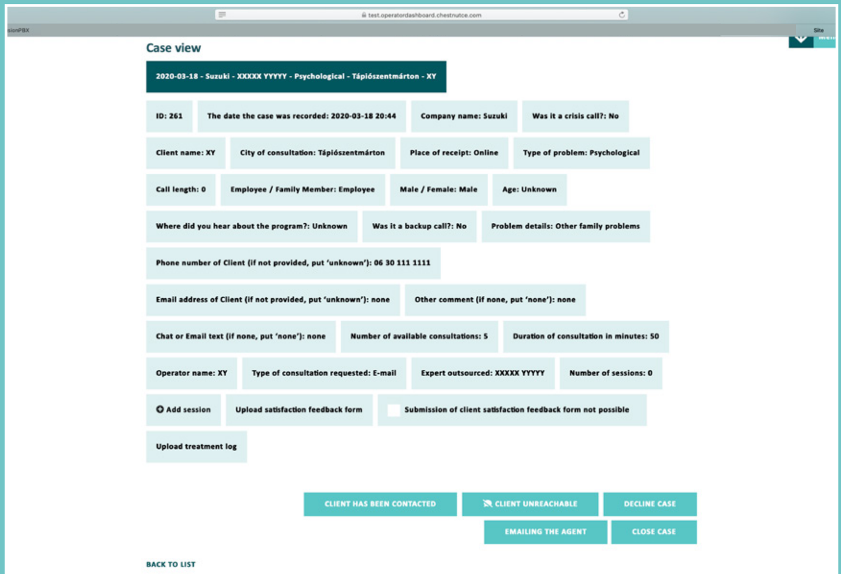
After you have successfully logged in to the dashboard with your username and password, you will receive a confirmation email about the successful activation of your account. After that, all you have to do is wait for the cases assigned to you.

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.



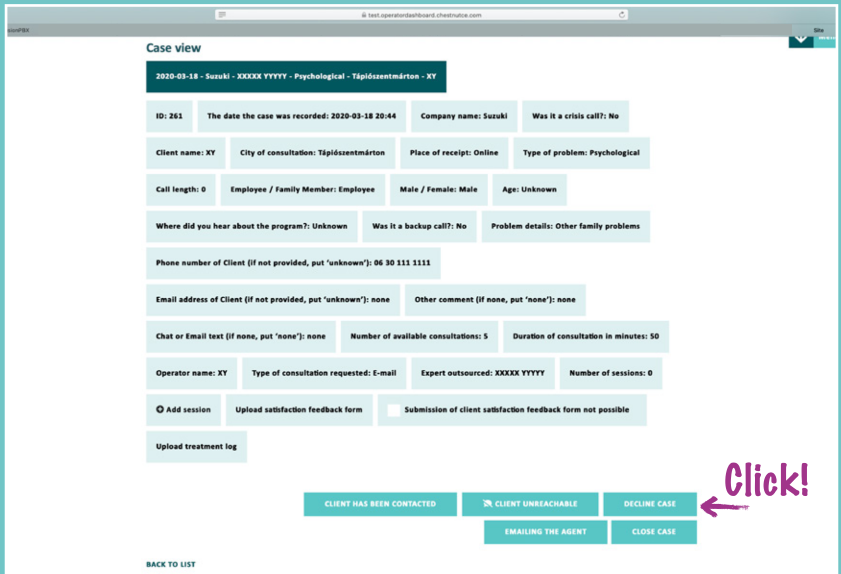
Case profile

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

Accepting a case

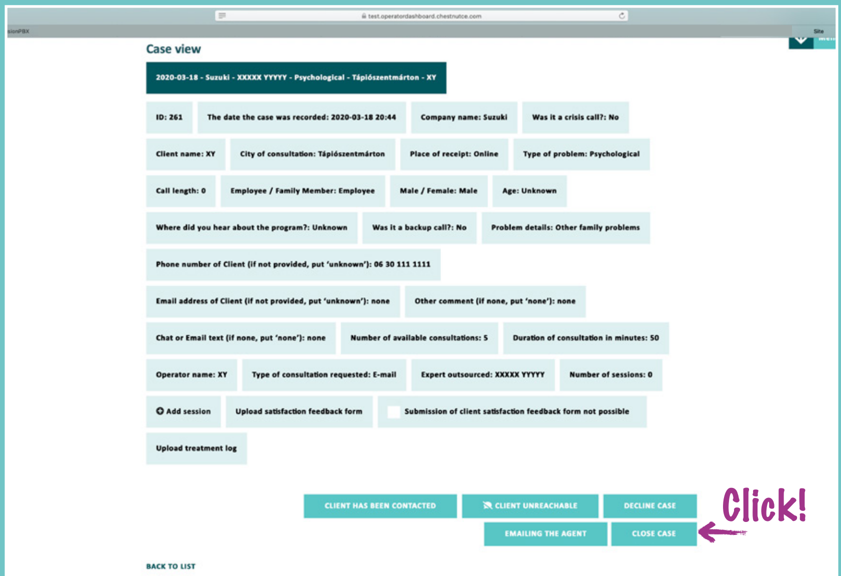
Open the case profile of the assigned case after you have contacted the client and click „Client has been contacted": This will notify the agent that you have accepted the case and that you have already contacted the client. The client has to be contacted within 48 hours after a case has been assigned!



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



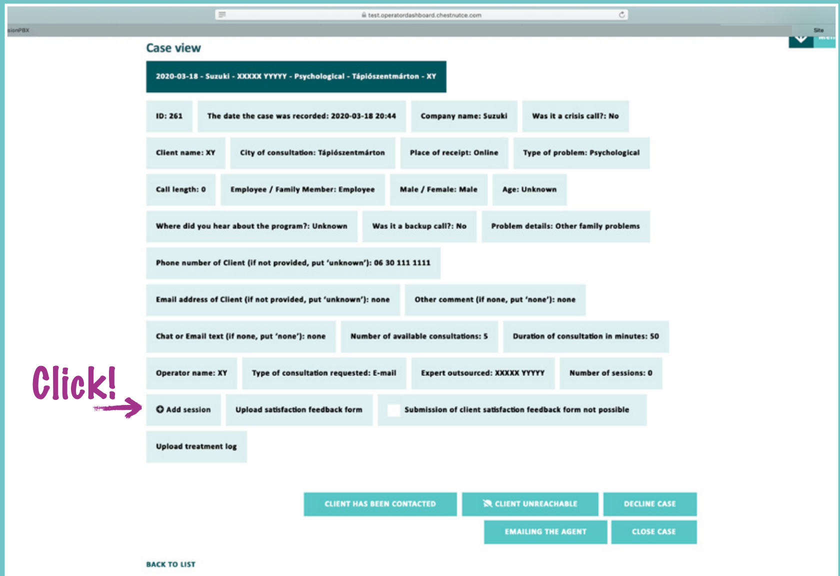
Client unreachable

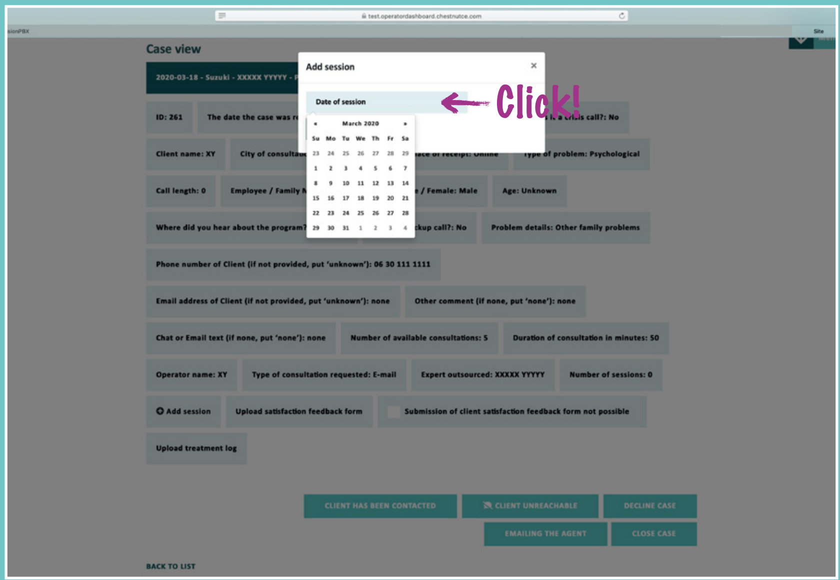
When the client cannot be reached after three phone calls attempted at different times of the day and one text message, the client officially qualifies as unreachable, and the counselling cannot be started. In this case, click „Client unreachable” to simultaneously notify the agent about this and close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

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



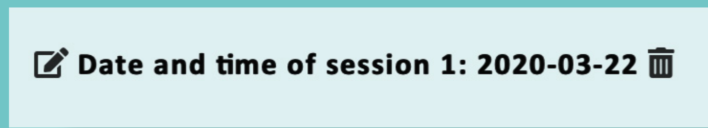


Registering appointments

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.

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



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

4. Administration of cases

Emailing the agent

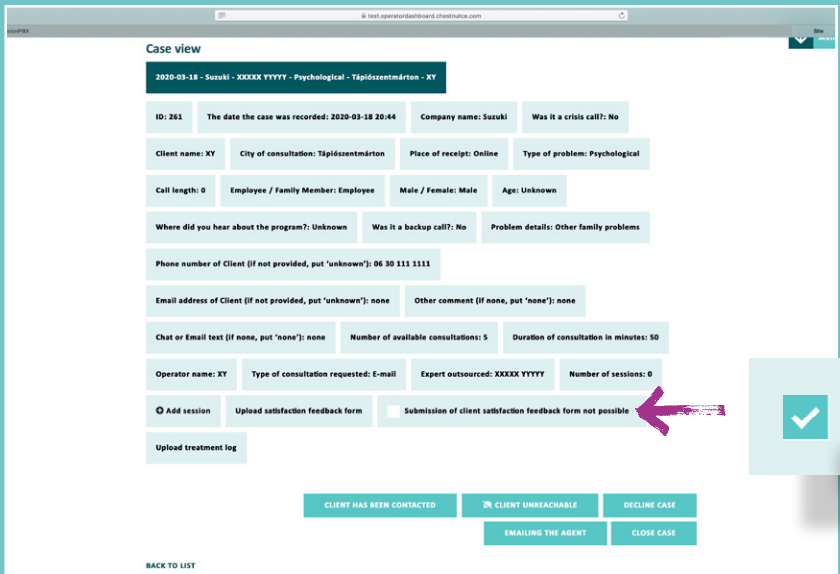
Click „Emailing the agent" if you have any requests, questions or comments about the case or you want to share information relevant to the case with the agent that has assigned the case to you.

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.

4. Administration of cases

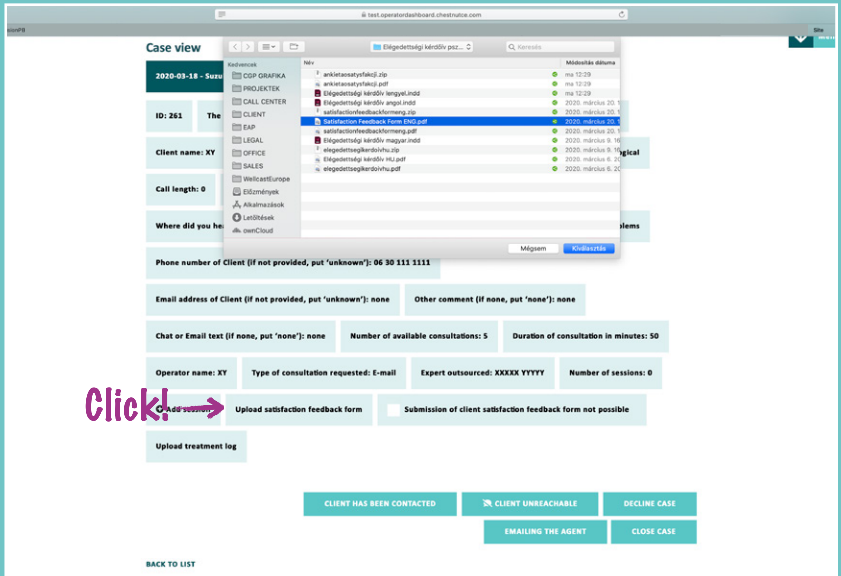
Client becomes unreachable

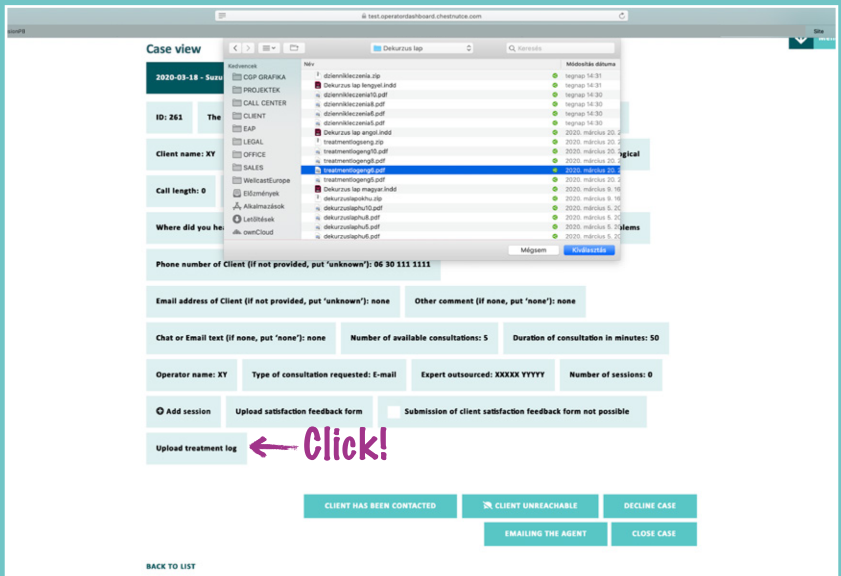
Sometimes the counselling starts, but the client doesn't show up for the first appointment and becomes unreachable. In such cases, the case can be closed by clicking „Client unreachable" after three unsuccessful phone calls and one text message. Make sure you delete the previously registered appointment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



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 feedack form not possible" box to be able to close the case.

4. Administration of cases





Closing a case - Uploading the client satisfaction feed-back 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”.

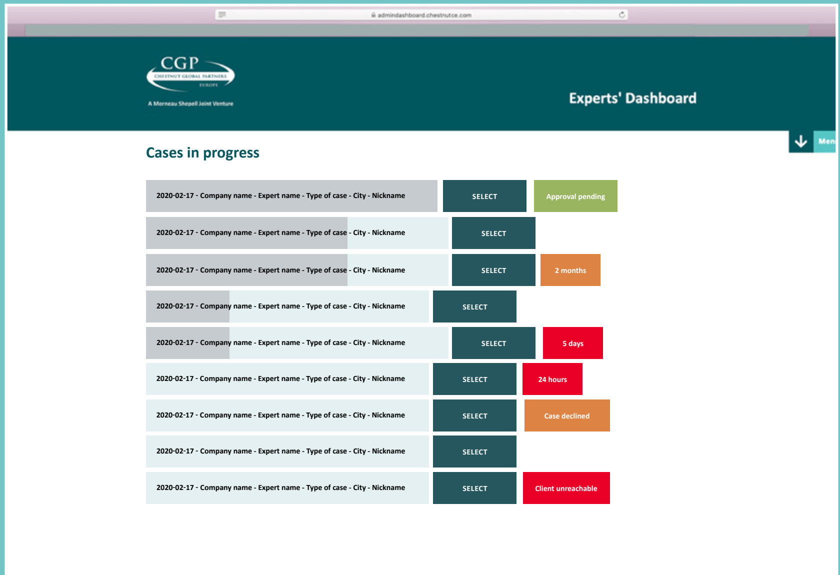
You can download the client satisfaction feedback form in PDF format from the „Satisfaction Feedback form” menu of Experts’ Dashboard.

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



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 assigment of the case.

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

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.

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.