



# Assure Programs: Professional Portal FAQs and Guide

Version 1.3

November, 2016

All times mentioned in the following document are based on Australian Eastern Standard Time.



# Assure Programs: Professional Portal

## Table of Contents

### The Professional Portal

What is the Professional Portal? .....	5
Beginning the Professional Portal Experience.....	5

### FAQ: Appointment Information & Statistics

Can I book appointments with cases created before 01/03/16? .....	5
Do I need to call Assure Programs for each appointment booking? .....	6
How many appointments can a client book? .....	6
The Professional Portal shows that my client has already used a session, how has this happened? .....	7
Where do I enter the Mandatory Statistics? .....	7
A Client did not attend their first appointment, do I enter the Mandatory Statistics? .....	8
I did not enter an appointment into my diary this week, can I do it later? .....	8

### FAQ: Invoices & Payment

Am I required to send my invoices into Assure Programs? .....	8
How do I view my invoice? .....	9
When will my invoice be processed? .....	9
I did not notify Assure Programs of a discrepancy in my invoice before TUESDAY 12p.m., when will the invoice be processed? .....	9
Do I need to press the ACCEPT button on my invoice? .....	10
When do I need to accept my invoice? .....	10
I did not press the ACCEPT button before C.O.B. Tuesday, will I still be paid? .....	10
I can't Accept my invoice, Help! .....	11

### FAQ: General

I've forgotten my username/password. What should I do? .....	11
The Save & Close button is not appearing on my screen. ....	11
I upgraded my computer to Windows 10 and the Professional Portal no longer works. Why is this? .....	12
I've watched the YouTube videos, read the FAQs and the Professional Portal Guide but there is still a problem.....	12



## Assure Programs' Service Types

Employee Assistance Program (E.A.P) Appointments .....	13
Management Referrals.....	13
Assure First Counselling Referrals.....	13
Assure First Management Referrals .....	14
Critical Incident Management (CIMs).....	14
On-site Appointments .....	14

## Locating Case Specific Information

How to Locate a Client's Case.....	15
Case Management.....	16
A Client's Case.....	16
Case Number.....	16
Contact Details.....	16
Date the case was created.....	16
Number of appointments the client is allowed.....	16
Entitlement renewal date.....	16
Appointment history.....	17
Access to the Mandatory Statistics.....	17
Extension Request Status.....	17

## Guidance for the Professional Portal

How to Book Subsequent Appointments.....	18
How to add an Additional Attendee.....	19
How to Cancel an Appointment without Charges.....	20
How to Apply Late Cancellation Charges.....	21
How to Enter an Extension Request.....	22
How to Locate an Old Invoices.....	23
How to Print an Invoice.....	24
How to Book a Management Referral Appointment .....	25
How to Enter Feedback for a Management Referral .....	27
Attendance Only Feedback .....	28
Brief Feedback .....	28



Written Feedback .....	29
How to Lodge Allocated Time for a Management Referral Written Report. ....	31
<b>YouTube Training Videos</b>	
Where to Find the Training Videos.....	32
How to Watch the Video.....	32
Overviews of the Professional Portal.....	32
General Overview of the Professional Portal.....	32
Individual User Overview of the Professional Portal.....	32
Diary Management.....	32
How to Manage a Practice Diary.....	32
Case Administration.....	33
How to book Subsequent Appointments.....	33
Additional Video: How to book an Appointment in the Professional Portal.....	33
How to Cancel Appointments in the Professional Portal.....	33
How to Enter Statistics in a Case.....	33
How to apply for an Extension Request.....	33
Invoice Management.....	33
How to Approve an Invoice.....	33
Contact Information.....	34



# The Professional Portal

---

## [What is the Professional Portal?](#)

---

The Professional Portal is a web-based platform that allows secure access to client's case information stored on the cloud. This platform uses the client's case information to book appointments, generate invoices, submit extension requests and perform other administrative functions.

[Return to Table of Contents](#)

## [Beginning the Professional Portal Experience](#)

---

The Professional Portal is optimised for the latest update of web-browsers Internet Explorer for PC and Safari for Mac computers.

Enter the URL address <http://cc001.eapcloud.com/professionalportal/> into your browser to open the Professional Portal login screen.

Enter your username and password into the fields provided and press the LOGIN button.

If this is the first time for logging into the Professional Portal, the system will ask you to update your password.

[Return to Table of Contents](#)

## FAQ: Appointment Information & Statistics

---

### [Can I book Standard EAP appointments using cases created before 01/03/16?](#)

---

Yes. EAP Cases created before 01/03/16 can now be used in the Professional Portal. EAP **Appointments** conducted prior to the 01/03/16 cannot be retrospectively entered into the portal and will require a paper invoice and applicable B-from to be sent to the Invoice Department.

[Return to Table of Contents](#)



---

### Do I need to call Assure Programs for each appointment booking?

---

Assure Programs' Client Support Team will conduct the registration of clients and book their initial appointment into your Professional Portal diary. Booking the initial appointment allows Assure Programs to allocate the Psychologist case authority in their Professional Portal to view and edit the client's case along with booking subsequent appointments. Subsequent appointment bookings can be completed directly through the portal without contacting Assure Programs until the case has exhausted its allowance.

[Return to Table of Contents](#)

---

### How many appointments can a client book?

---

Every client is entitled to a certain number of appointments through the E.A.P. This number is determined by the client's workplace and may differ depending on where they are employed. Clients cannot exceed the number of appointments they are allocated without an approved Extension Request.

To access the number of appointments a client is entitled to, use the Finder button to locate their case. In their Case Management window select the tab *Contract Terms* to display the number of appointments available to the client next to *Number Per Client*.

A log of previous appointments is located in the tab *Activity Entry* in the Case Management window to help determine the remaining appointments available to the client.

Booking an appointment will display the currently used sessions along with the total number the client is entitled to have.

This format is presented as [*Case number, Appointment type, EAP X(Y)*]

Where *X* is the number of appointments used and *Y* is the total number of appointments the client can attend.

*E.g. 212123, Face to Face, EAP 2(4)*

This indicates that two of four appointments have been utilized.

[Return to Table of Contents](#)



---

## The Professional Portal shows that my client has already used a session, how has this happened?

---

Clients are entitled to a set number of appointments during a 12 month period set by their workplace. Situations may occur in which the client used a session/s with a Psychologist and at a later date books in with another Psychologist and uses their final allocated appointments. The client is only allowed the maximum number of sessions set by their workplace even when changing Psychologists. The booked appointment block will display utilized sessions and the maximum sessions allowed

*e.g. 212123, Face to Face, EAP 2(4) may display in the Appointment Block for the first appointment. This indicates that a session was previously used and this appointment is the client's second of four provided sessions.*

More sessions can be obtained after the 'Entitlement Renewal Date' located under the Contract Terms tab in the client's case or by submitting an Extension Request.

[Return to Table of Contents](#)

---

## Where do I enter the Mandatory Statistics?

---

To locate the mandatory statistics that each case requires, use the FINDER button at the top of the screen and search for the case. When the client's Case Management window is open, select the tab *Statistics* followed by the tab *Primary Presenting Concerns*. A brief written summary and four drop down menus marked with **red asterisks** will be seen in this window. The dropdown statistic fields include:

- Workplace Concern
- Workplace Impact (Initial)
- Personal Concern
- Personal Impact (Initial)

The Brief Summary text field along with the four presenting concern dropdown menus must be filled for the case to be correctly completed. If the statistic is not relevant for the case (e.g. a client who does not display workplace concerns) select *None* from the dropdown options.

A finger icon will appear adjacent to a case if these mandatory statistical entries are not completed.

[Return to Table of Contents](#)



---

A client did not attend their first appointment, do I enter the Mandatory Statistics?

---

The mandatory presenting concern statistics should not be entered if a client has DNA/Late Cancelled. It is important to keep the Mandatory Statistic fields blank to allow the system's prompts to appear after the next appointment is conducted. Assure Programs' Invoice Department monitors DNAs and will accept the invoice on your behalf if all other cases are correctly completed with the Mandatory Statistics and no fingers are present.

[Return to Table of Contents](#)

---

I did not enter an appointment into my diary this week. Can I do it later?

---

Appointments should be entered into the Professional Portal and updated to reflect DNA/Late Cancellations by C.O.B. each Friday. Please email Assure Programs if an appointment from a previous week was not entered into the Professional Portal. Informing us will help ensure the invoices are not missed and payment is provided for these sessions.

[Return to Table of Contents](#)

## FAQ: Invoices & Payment

---

Am I required to send my invoices into Assure Programs?

---

Standard EAP, Management Referrals, Assure First Counselling Referral and Assure First Management Referral appointments correctly entered into the Professional Portal **do not** require invoices or form B's to be sent into Assure Programs.

To create a paperless experience, the Professional Portal automatically and electronically completes invoices and form B's.

Sending invoices into Assure Programs and entering appointments into the Professional Portal may result in overcharges and the **client incorrectly losing a session.**

[Return to Table of Contents](#)



---

### How do I view my invoice?

---

A new invoice is released each Monday onto the Professional Portal. This invoice outlines the appointments conducted from the previous week and any other outstanding appointments. Pressing the FINDER button and the tab 'Invoices' will open a window to display all current and previous invoices. Select the date range at the top of the window and press the SEARCH button to display the specified invoices. Double click on the invoice number to display the invoice in greater detail.

[Return to Table of Contents](#)

---

### When will my invoice be processed?

---

Each Monday, Assure Programs' Invoice Department generates invoices for all appointments conducted and lodged into your professional portal from the prior week. These invoices are realised onto the Professional Portal where they can be viewed and accepted. The released invoice specifies the list of conducted services and appointments from the previous week and any that remain previously outstanding. Please review the invoice when you receive a notice via email that the invoice has been released. If you identify any errors on the invoice, please email the details of the error to Assure Programs Invoice Department (invoices@assureprograms.com.au) by 12pm the next business day (by Tuesday).

Once notified of any errors, the Assure Programs Invoice team will then amend the invoice details, and generate a new invoice that will be sent to you through the portal, on that same **Tuesday** afternoon. You will then need to check the updated invoice for the specified amendments and press the ACCEPT button if the invoice is now correct. Notifying Assure Programs of discrepancies by the 12pm **Tuesday** will help ensure that you are paid the correct amount on time.

[Return to Table of Contents](#)

---

### I did not notify Assure Programs of a discrepancy in my Invoice before TUESDAY 12p.m., when will the invoice be processed?

---

If an email notice of invoice errors is received by Assure Programs' Invoice Department after 12p.m. Tuesday the corrected invoice will be released the following Monday.

[Return to Table of Contents](#)



---

### Do I need to press the ACCEPT button on my invoice?

---

Invoices that Assure Programs releases each Monday through the Professional Portal will require you to press the ACCEPT button within the invoice screen . By pressing the ACCEPT button you will be informing Assure Programs that the listed number of services and amount charged on the invoice are correct.

[Return to Table of Contents](#)

---

### When do I need to accept my invoice?

---

You must press the ACCEPT button before C.O.B. Tuesday so the amount listed in the released invoice can be processed on the next business day (Wednesday). If an invoice cannot be accepted because of a finger (missing data) or other fault, please notify Assure Programs ASAP with an email so the Invoice Department can ensure that you are paid the correct amount on time.

[Return to Table of Contents](#)

---

### I did not press the ACCEPT button before C.O.B. Tuesday, will I still be paid?

---

Invoices released on a Monday by Assure Programs that have not had the ACCEPT button pressed prior to C.O.B. Tuesday **will not be processed** or **have payment provided**. If you did not press the ACCEPT button before C.O.B. Tuesday, the number of services and amount charged listed on the released invoice will not have been confirmed as correct.

If you were unable to press the ACCEPT button on a released invoice before C.O.B. Tuesday and did not inform Assure Programs of a finger (missing data) or error via email, the same invoice will be reversed from the system and released the following Monday to be confirmed as correctly displaying the list of services and amount charged by pressing the ACCEPT button in the professional portal.

[Return to Table of Contents](#)



---

## I can't Accept my invoice, Help!

---

There are several reasons why the 'Accept' Button on the invoice screen would be greyed-out. A common occurrence is that client's cases will be incomplete and display a finger adjacent to the case number. Remove the finger by completing all mandatory statistics fields and the 'Accept' button will no longer be greyed-out.

If the client cancelled their appointment within 24 hours or was a DNA a finger will continue to appear for this case and the 'Accept' button will be greyed-out. Assure Programs' Invoice Department monitors DNAs and will accept the invoice on your behalf if all other cases are correctly completed and no fingers are present.

Please contact Assure Programs' Invoice Department ([invoices@assureprograms.com.au](mailto:invoices@assureprograms.com.au)) before 12pm Tuesday if the 'Accept' button is greyed-out after completing the mandatory statistics and if the appointment is not a DNA. Assure Programs will investigate further to help process the blocked invoice.

[Return to Table of Contents](#)

## FAQ: General

---

### I've forgotten my username/password. What should I do?

---

Email Assure Programs ([info@assureprograms.com.au](mailto:info@assureprograms.com.au)) stating that you have forgotten your username/password. Assure Programs will contact you with the information to ensure you have access to the Professional Portal.

[Return to Table of Contents](#)

---

### The Save & Close button is not appearing on my screen.

---

Buttons may not immediately appear on computer screens due to differing resolutions. If a button is not appearing, such as the 'Save & Close' button at the bottom of *Appointment* window, use the following keyboard shortcuts to view a larger portion of the Professional Portal on your screen.



For Windows computers: Press the **F11** button to enter a full screen mode of the Professional Portal and **F11** again to exit the full screen mode.

For Mac computers: Press **Control+Command+F** to enter a full screen mode of the Professional Portal and **Control+Command+F** again to exit the full screen mode.

[Return to Table of Contents](#)

---

I have upgraded my computer to Windows 10 and the Professional Portal no longer works. Why is this?

---

The Professional Portal is compatible with any internet browser that runs Silverlight. Two popular browsers that supports the Professional Portal are Internet Explorer and Safari. When upgrading to Windows 10, the default internet browser will change from Internet Explorer to Microsoft Edge. Please ensure that Internet Explorer is being used to access the Professional Portal and not Microsoft Edge as it and will not display your Portal Diary.

[Return to Table of Contents](#)

---

I've watched the YouTube videos, read the FAQs and the Professional Portal Guide and there is still a problem.

---

There are a few steps that may help resolve an operation when it is not functioning correctly or if the Professional Portal is not cooperating.

1. Check that you are using Internet Explorer or Safari and it is running the latest version. Updating the browser may fix the issue.
2. Logout and close the browser window. Opening the browser and logging in again may fix the issue.
3. Turn off your computer and leave it for a minute. Turning it back on may fix the issue.

If the above steps do not resolve the issue please contact Assure Programs on Phone: (07) 3211 8919 EST or Email: [info@assureprograms.com.au](mailto:info@assureprograms.com.au) and our Team will investigate the encountered problem.

[Return to Table of Contents](#)



# Assure Programs' Service Types

---

## Employee Assistance Programs (E.A.P.) Appointments

---

Standard E.A.P. appointments are processed through the Professional Portal. Clients require a unique case number provided by Assure Programs to access a set number of appointments nominated by their workplace. Mandatory Statistics are required for each case for an invoice to be generated and released.

[Return to Table of Contents](#)

---

## Management Referrals

---

Management Referrals (MRs) are processed through the Professional Portal. MR appointments are entered with the same process as an EAP appointment. The system will indicate that a Management Referral appointment has been placed into a Portal Diary by listing the Service Type as 'Management Referral'. Feedback about the Management Referral will also be entered into client's case in the appropriate feedback tab found in the Professional Portal. Please email [triagepsychologyteam@assureprograms.com.au](mailto:triagepsychologyteam@assureprograms.com.au) notifying that the requested feedback has been entered along with the case number.

[Return to Table of Contents](#)

---

## Assure First Counselling Referral

---

An Assure First Counselling Referral appointment is conducted and processed exactly as a Standard E.A.P. appointment. This service type is limited to organisation that provide counselling to employees on an ad hoc basis. Mandatory Statistics are required for each case for an invoice to be generated and released.

[Return to Table of Contents](#)



---

### Assure First Management Referrals

---

An Assure First Management Referral appointment is conducted and processed exactly as a Management Referral appointment. This service type is limited to organisation that provide Management Referral counselling to employees on an ad hoc basis. Feedback about the Management Referral will also be entered into client's case in the statistics tab found in the Professional Portal. Please email [triage@assureprograms.com.au](mailto:triage@assureprograms.com.au) notifying that the requested feedback has been entered along with the case number.

[Return to Table of Contents](#)

---

### Critical Incident Management (CIMs)

---

Psychologists that performed a CIMs service are required to continue with the non-portal process of invoicing and returning required information via email after conducting the service.

[Return to Table of Contents](#)

---

### On-site EAP Appointments

---

Psychologists with agreements to perform on-site EAP sessions for our customers are required to continue using the non-portal process of invoicing. Paper invoices and B-Forms are will to be required to process payment.

[Return to Table of Contents](#)



# Locating Case Specific Information

---

## How to Locate a Client's Case

---

### Using the FINDER function:

- Press the FINDER button (magnified glass) at the top of the screen and a 'Finder' window will appear.
- This window will provide multiple methods to locate a client's case. There are several reasons to locate a client's case including:
  - Recording the client's case number
  - Checking the number of appointments the client is allowed and has used.
  - Knowing the client's appointment history
  - Finding the client's contact details
  - Completing mandatory statistics
  - Entering an Extension Request for additional appointments.

### Entering the Search Information

- Enter the client's Case Number, First Name, Last Name, or Organisation into the provided field to locate the required case.

*NOTE: Entering information into the Organisation search field and any other search field (i.e. Case Number or Names) will yield 0 results. The Organisation search field must be used independently and cannot be used in conjunction with other search criteria.*

- The drop down menu to the right of each search field filters the search criteria. This will display by default 'Starts With'. Searching with this filter will present search results that start with the information entered into the search field. Selecting 'Contains' will maximise the search function by providing results that have any resemblance to the information entered.

*e.g. If 'Starts With' is selected and "Beth" is entered into the First Name field, cases will display with first names that start with "Beth". If the 'Contains' field is selected, cases with a first name including the information of "Beth", i.e. Elizabeth, will display.*

- Press the SEARCH button to retrieve cases corresponding to entered search information.
- Cases will appear on the lower portion of the screen with information relevant to the search criteria.
- Click on a client's case to select it and press the OPEN button at the bottom of the screen. This will open the client's case and show the 'Case Management' window.

[Return to Table of Contents](#)



---

## Case Management

---

### Locating the Client's Case:

- Press the FINDER button at the top of the screen and a window will open.
- Enter the client's Case Number, First Name, Last Name, or Organisation to locate the required case.
- Click on the client's case that appears in the window and press the OPEN button at the bottom of the screen.

### Case Management

- The 'Case Management' window will appear onscreen for the client's case.
- This window will provide information about:
  - The client's case number:
    - Found under the tab *Case Summary* in the top right corner of the window adjacent to 'Case Number'
  - The client's contact details:
    - Found under the tab *Case Summary* on the left side of the window under 'Email', 'Mobile', 'Work' and 'Personal'.
  - The date the case was created:
    - Found under the tab *Case Summary* in the top right corner of the window adjacent to 'Open Date'
  - The number of appointments the client is allowed:
    - Click on the tab *Contract Terms*.
    - A number will display in a box adjacent to 'Number per Client' indicating the number of appointments the client is allowed for their case.

*NOTE: Cases must not exceed the 'Number per Client' without an approved Extension Request.*

- The client's entitlement renewal date
  - Click on the tab *Contract Terms*.
  - A text box will be viewable on the right side of the screen. Use the scroll bar to locate the "Entitlement Renewal Date". Adjacent to this text will display the date that the client's entitlements renew and a new case can be generated with the full entitlements.



- The client's appointment history:
  - Click on the tab *Activity Entries*
  - An archive of previously entered appointments and any upcoming appointments will display for the selected client's case. This provides a reference for how many appointments are remaining/used on the case.

*NOTE: Activity Entries will only display appointments booked using this specific case number, not all appointments that the client has previously booked under different case numbers.*

- Access to the mandatory statistics:
  - Click on the tab *Statistics*
  - Click on the tab *Primary Presenting Issues*
  - 'Mandatory Brief Summary of Presenting Concerns' will be available in the field provided at the top of the window.
  - Additional mandatory statistics will be available from the dropdown menus highlighted with the red asterisks
- Extension Request status.
  - Click on the tab *Contract Terms*
  - Click on the tab *Additional*. This window displays the request that was previously entered for this case.
  - A tab *Approved* will be available to click if the Extension Request was approved. Clicking on this will provide information of how many additional appointments the client can use, the date the request was approved and a field for relevant notes written by the Triage Psychologist actioning the request.
  - A tab *Declined* will be available to click if the Extension Request was not approved. Clicking on this will provide information of when the extension request was declined with a written explanation.

[Return to Table of Contents](#)



# Guidance for the Professional Portal

---

## How to Book Subsequent Appointments

---

### Locate a Suitable Appointment:

- Press the DATE PICKER button in the top left of the screen to select the date the client requested an appointment.

*e.g. Tim has requested an appointment on Thursday 28<sup>th</sup> April. Press the DATE PICKER button and click 28/04/16 on the calendar.*

- The selected date will display in your diary with any available space for appointments to be booked.
- To locate a suitable time, use the scroll bar on the right side of the screen to move across your diary.

### Selecting the Appointment:

- Double-click on the diary row corresponding to the client's requested time.

*e.g. The client wants a 1pm appointment. Double-click on the row that aligns with 1pm.*

- Press the OK button to select work appointment

### Selecting the Client:

- In the *Find Existing Case* window that will have appeared, complete a search to find the client's case. Details of the client's first and last name, organisation or case number can be used to locate the case.

*Note: Using the case number will yield the most accurate results.*

- Information will appear in the window relating to the client's case.
- Click on the new information and press the SELECT button at the bottom of the screen.

### Confirming the Appointment Details:

- The *Appointment* window provides details of the appointment. Information such as time/date of the appointment, personal details of the client and Activity Type can be confirmed.
- Select the Activity Type by clicking on the drop down and clicking the appropriate option (e.g. face to face, phone, couple)
- Click on the Service drop down menu below the Activity Type to select the corresponding option.
- Press the SAVE & CLOSE button to confirm the booking

[Return to Table of Contents](#)



---

## How to add an Additional Attendee

---

### Locate the Appointment:

- Press the DATE PICKER button in the top left of the screen to select the date when appointment is booked.

*e.g. Tim is having an appointment with his wife on Monday 2<sup>nd</sup> May. Press the DATE PICKER button and click 02/05/16 on the calendar.*

- The selected date will display in your diary with any available space for appointments to be booked.
- To locate the appointment's time, use the scroll bar on the right side of the screen to move across your diary.

### Adding a Client to the Appointment:

- Double-click on an empty diary row.
- Press the OK button to select work appointment
- The *Appointment* window provides details of the appointment. Information such as time/date of the appointment, personal details of the client and Activity Type can be confirmed.
- Edit the time of the appointment by clicking on the drop down menu under *Dairy Date/Time* displaying the time found in the top right corner of the window. Select the time that coincide with the original attendees
- Select the Activity Type by clicking on the drop down and clicking the appropriate option (e.g. face to face, phone)
- Click on the 'Service' drop down menu below the 'Activity Type' to select *Additional Attendee*.

[Return to Table of Contents](#)



---

## How to Cancel an Appointment without Charges

---

*NOTE: Appointments cancelled outside of 24 hours will not utilize the client's session.*

### **Locate the Appointment:**

- Press the DATE PICKER button in the top left of the screen to select the date the client is booked for their appointment.

*e.g. June has an appointment booked for Wednesday 27<sup>th</sup> April. Press the DATE PICKER button and click 27/04/16 on the calendar.*

- The selected date will display in your diary with any appointments scheduled on this day.
- To locate the appointment, use the scroll bar on the right side of the screen to move across your diary.

### **Deleting appointments outside of 24 hours.**

- Click on the appointment block to select it and either press the DELETE button at the top of the page or right click on the appointment and select the option DELETE APPOINTMENT.
- A Confirmation Window will appear to ask if you want to delete the appointment.
- Press the DELETE APPOINTMENT to confirm the appointment removal.
- The appointment will disappear from the diary.
- This appointment will not be invoiced.

[Return to Table of Contents](#)



---

## How to Apply Late Cancellation Charges

---

**NOTE:**  *cancelling appointments within 24 hours of their start time will utilize one of the client's free sessions.*

### **Locate the Appointment:**

- Press the DATE PICKER button in the top left of the screen to select the date the client is booked for their appointment.

*e.g. June has an appointment booked for Wednesday 27<sup>th</sup> April. Press the DATE PICKER button and click 27/04/16 on the calendar.*

- The selected date will display in your diary with any appointments scheduled on this day.
- To locate the appointment, use the scroll bar on the right side of the screen to move across your diary.

### **Deleting Appointments within 24 hours**

- Click on the appointment block to select it and either press the DELETE button at the top of the page or right click on the appointment and select the option DELETE APPOINTMENT.
- A Confirmation Window will appear to ask if you want to delete the appointment and charge the client for the late cancellation.
- If the client is to be charged for the late cancellation, ensure the APPLY CHARGE check box is ticked and press the CONFIRM CHARGE button.
- If the client is not to be charged for the late cancellation, untick the APPLY CHARGE box by clicking on it and press the DELETE APPOINTMENT button.
- The appointment will continue to appear in your diary with the addition of a red cross in the bottom right
- An invoice displaying the late cancellation will be generated for this appointment.

**NOTE:** *Do not manually select the Service drop down option 'Late Cancellation/DNA'. Please follow the steps outlined above to apply late cancellation/DNA charges to an appointment.*

[Return to Table of Contents](#)



---

## How to Enter an Extension Request

---

### Locating the Client's Case:

- Press the FINDER button at the top of the screen and a window will open.
- Enter the client's Case Number, First Name, Last Name, or Organisation to locate the required case.
- Click on the case information that appears in the window and press the OPEN button at the bottom of the screen.

### Adding the Extension Request:

- A Case Management window will appear and select the tab *Contract Terms*.
- Press the ADD EXTENSION REQUEST button.

### Entering Extension Request Details:

- Enter the number of additional sessions required into the Number Requested field. This will contain the value of 0 by default.
- Under the tab *Part 1*, select the requesting psychologist's name from the Requested By dropdown menu.
- Enter the *Primary Concern and Reason for Request* in the blank field.
- Enter the *Goals to be achieved (how to resolve the client's issue)* in the blank field.
- If applicable, enter details into the *Will the client be referred to another service (and/or other notes)* blank field.
- Click on the tab *Part 2*.
- Yes or No must be selected for each option.
- If applicable, enter the Role and Name of the Supporting Organisation Person.
- Press the SAVE & CLOSE button.
- An email notification will be sent to Assure Programs' Triage Team with the extension request.

[Return to Table of Contents](#)



---

## How to Locate an Old Invoice

---

### Opening Invoice Finder

- Press the FINDER button at the top of the screen and a window will open.
- In the 'Finder' window, click the tab *Invoices*

### Viewing all Invoices

- Ensure that the ALL box is ticked
- Press the SEARCH button
- Every invoice that has been processed will display in the search box
- Click on the invoice to select it
- Press the OPEN button to view the invoice in the *Invoice Edit* window that appears.

### Viewing Specific Invoices

- Ensure that the ALL box is unticked
- Press the calendar icon adjacent with FROM and select start date for the search.
- Press the calendar icon adjacent with TO and select end date for the search.
- Press the SEARCH Button

*e.g. Selecting the dates FROM: 01/02/16 and TO: 29/02/16 will provide all invoices between these two dates.*

- Click on the invoice to select it
- Press the OPEN button to view the invoice in the *Invoice Edit* window that appears.

[Return to Table of Contents](#)



---

## How to Print an Invoice

---

### Opening Invoice Finder

- Press the FINDER button at the top of the screen and a window will open.
- In the 'Finder' window, click the tab *Invoices*

### Finding a Specific Invoice

- Ensure that the ALL box is unticked
- Press the calendar icon adjacent with FROM and select start date for the search.
- Press the calendar icon adjacent with TO and select end date for the search.
- Press the SEARCH Button
- Click on the desired invoice to select it
- Press the OPEN button to view the invoice in the *Invoice Edit* window that appears.

### Viewing an Invoice

- Check that the invoice number in the top right side of the window is correct
- Press the VIEW INVOICE button found below the invoice *Number* and *Date* fields
- A softcopy .pdf of the invoice will generate and open in a new window.

### Printing the Invoice

- While the invoice is displaying within the .pdf viewer window:
  - For PCs: Press Ctrl + P to view the printing options for your computer and press the OK button
  - For Macs: Press Command + P to view the printing options for your computer and press the OK button

### Saving a Copy of the Invoice

- While the invoice is displaying within the .pdf viewer window press FILE at the top of your screen
- Select SAVE AS to view the saving options on your computer and press the SAVE button.

[Return to Table of Contents](#)



*Note: Management Referrals are booked into the Professional Portal using the same process as an EAP appointment.*

*Note: Steps unique to the process of booking Management Referral appointments will be underlined.*

### **Locate a Suitable Appointment:**

- Press the DATE PICKER button in the top left of the screen to select the date the client requested an appointment.

*e.g. Tim has requested a Management Referral appointment on Thursday 28<sup>th</sup> April. Press the DATE PICKER button and click 28/04/16 on the calendar.*

- The selected date will display in your diary with any available space for appointments to be booked.
- To locate a suitable time, use the scroll bar on the right side of the screen to move across your diary.

### **Selecting the Appointment:**

- Double-click on the diary row corresponding to the client's requested time.

*e.g. The client wants a 1pm appointment. Double-click on the row that aligns with 1pm.*

- Press the OK button to select work appointment

### **Selecting the Client:**

- In the *Find Existing Case* window that will have appeared, complete a search to find the client's case. Details of the client's first and last name, organisation or case number can be used to locate the case.

*Note: Using the case number will yield the most accurate results.*

- Information will appear in the window relating to the client's case.
- Check that the client's case displays 'Management Referral' under the Service Type column header found on the right hand side of the window.
- Click on the client information and press the SELECT button at the bottom of the screen.

### **Confirming the Appointment Details:**

- The *Appointment* window provides details of the appointment. Information such as time/date of the appointment, personal details of the client and Activity Type can be viewed and confirmed in the *Appointment* window.
- Select the Activity Type by clicking on the corresponding drop down menu and selecting the appropriate option. (e.g. face to face or phone)
- Management Referrals are usually performed as face to face appointments.



- Management Referral appointments will display a different range of options in the Service drop down menu.
- Select the appropriate Service option from the drop down menu (e.g. Management Referral – Face to Face or Management Referral – Phone).
- Press the SAVE & CLOSE button to confirm the booking

[Return to Table of Contents](#)



---

## How to Enter Feedback for a Management Referral

---

*Note: Please email [triagepsychologyteam@assureprograms.com.au](mailto:triagepsychologyteam@assureprograms.com.au) to notify if any feedback has been entered into a case along with the case number.*

### Locating the Client's Case:

- Press the FINDER button at the top of the screen and a window will open.
- Enter the client's Case Number, First Name, Last Name, or Organisation to locate the required case.
- Click on the client's case that appears in the window and press the OPEN button at the bottom of the screen.

*Note: The case will display 'Management Referral' under the 'Service Type' column.*

### Locating the Correct Feedback Field:

- In the Case Management window click on the tab *Statistics*
- Three additional tabs will be available:
  - Attendance Only
  - Brief Feedback
  - Written Feedback
- Click each tab to locate which form of feedback is required. A dropdown menu will indicate if the selected feedback is required stating 'Yes, please see below.'

### Prepopulated Referral Information:

- Four text fields will be prepopulated by the Triage Psychologist Team within the appropriate feedback statistical tab. Ensure that you read these four fields prior to engaging in the counselling session.
- The four prepopulated text fields are:
  - Reason for Referral
  - Management actions taken to date
  - Goal of Referral
  - Other Details

*Note: The 'Other Details' text box may contain clinically appropriate handover notes from the Triage Psychology Team.*

### Case Related Documentation:

- The signed consent form from the client's organisation will be uploaded and attached to the Management Referral's case.
- To locate this document, click on the tab 'Notes'
- Click on the note that is present in the window.
- With the note selected, press the 'File Attachments' button
- Click on the available file to select it.



- Press the 'Open File' button and the documentation will open in a new window.

[Return to Table of Contents](#)

### **Attendance Only Feedback:**

#### **Attendance Only: After the Initial Appointment**

- Scroll down to the dropdown menu 'Client attended the initial session'.
- Click on the drop down menu 'Client attended the initial session' and select 'Yes' or 'No, please explain further'.
- If 'Yes' is selected do not enter any information into the 'Reason provided for non-attendance'
- If 'No, please explain further' was selected, enter the reason the client did not attend the session into the field adjacent to 'Reason provided for non-attendance'.
- Enter the time and date of the client's next session into the field 'Date and time of next session'

#### **Attendance Only: After the Final Appointment**

- Scroll down to the dropdown menu 'Client attended the final session'.
- Click on the drop down menu 'Client attended the final session' and select 'Yes' or 'No, please explain further'.
- If 'Yes' is selected do not enter any information into the 'Reason provided for non-attendance'
- If 'No, please explain further' was selected, enter the reason the client did not attend the session into the field adjacent to 'Reason provided for non-attendance'.
- Enter any additional notes deemed necessary relating to the client's attendance into the 'Other notes' field

*Note: Please email [triagepsychologyteam@assureprograms.com.au](mailto:triagepsychologyteam@assureprograms.com.au) to notify if any feedback has been entered into a case along with the case number.*

[Return to Table of Contents](#)

### **Brief Feedback:**

#### **Brief Feedback: Section 1**

- Check the dropdown menu 'Brief feedback after initial session'
- If the dropdown selection states 'Yes, complete Section 1 below' scroll down to 'Section 1:'
  - Click on the dropdown menu 'Client attended the session:' and select 'Yes' or 'No'.
  - Enter relevant information into field below 'Attendance notes:', i.e. why a client did not attend a session.
  - Select 'Yes' or 'No' to all of the following dropdown menu options
    - Client engaged in the session



- *Client acknowledged referred concern*
- *Client motivated to address referred concern*
- Enter relevant information into the large 'notes' field found under each dropdown menu option.
  - e.g. Client engaged in session: *No*. Client engagement notes: Client was uncooperative throughout the sessions...'
  - E.g. Client motivated to address referred concern: *Yes*. 'Client has addressed concern and will engage in plan outlined...'
- Enter relevant information into the fields adjacent:
  - *How can the org assist?*
  - *Session agreed goals or outcomes*
  - *Clinically relevant detail notes*
- Enter the time and date of the client's next session into the field 'Date and time of next session'

### **Brief Feedback: Section 2**

- Check the dropdown menu '*Brief feedback after final session*'
- If the dropdown selection states '*Yes, complete Section 2 below*' scroll down to '*Section 2:*'
  - Click on the dropdown menu '*Client attended all sessions:*' and select '*Yes*' or '*No*'.
  - Enter relevant information into field below '*Attendance notes:*', i.e. why a client did not attend a session.
  - Click the dropdown menu '*Referred concern resolved*' and select either '*Yes*' or '*No*'.
  - Write an explanation with relevant information into the field adjacent '*Outcome notes:*'
  - Write an explanation with relevant information into the field adjacent '*Ongoing support needs:*'
  - Write an explanation with relevant information into the field adjacent '*How can the org assist?*'
  - Write an explanation with relevant information into the field adjacent '*Clinically relevant detail notes:*'

*Note: Please email [triagepsychologyteam@assureprograms.com.au](mailto:triagepsychologyteam@assureprograms.com.au) to notify if any feedback has been entered into a case along with the case number.*

[Return to Table of Contents](#)

### **Written Feedback:**

#### **Written Feedback: Allocated Sessions for Writing Report**

- Select the *Written Feedback* Tab in the client case
- Adjacent to '*Approved report writing sessions:*' will indicate the number of sessions allocated to writing the Management Referral report.



### **Written Feedback: Report Template**

- The report template for written feedback will be emailed directly to you from the triage psychology team.

### **Written Feedback: Uploading the Report**

- Under the tab 'Notes' press the 'Add' button to create a new note.
- Click the 'Note Type' dropdown menu and select 'Psychologist Note'

*Note: Selecting Psychologist Note as the Note Type allows only the Triage Psychologists access to this note. This helps to keep a higher level of confidentiality.*

- Title the note in the 'Subject' field

*e.g. Enter the text 'Client Written Report' into the Subject field.*

- Enter any relevant information into the tab 'Note Text'
- Click the tab 'File Attachments'
- Press the 'Attach New File' button and a window will appear
- Select the report file from your computer's documents.
- Under the tab 'Written Feedback' enter the date the report was uploaded in the field adjacent to 'Report completed and attached (DATE)'

*Note: Please email [triagepsychologyteam@assureprograms.com.au](mailto:triagepsychologyteam@assureprograms.com.au) to notify if any feedback has been entered into a case along with the case number.*

[Return to Table of Contents](#)



---

## How to Lodge Allocated Time for a Management Referral Written Report

---

*Note: Please email [triagepsychologyteam@assureprograms.com.au](mailto:triagepsychologyteam@assureprograms.com.au) to notify if any feedback has been entered into a case along with the case number.*

### **Select the Date the Written Report was Completed:**

- Press the DATE PICKER button in the top left of the screen to select the date the Management Referral Report was completed.
- The selected date will display in your diary with any available space for the Management Referral - Written Report appointment to be entered.
- To locate a suitable time, use the scroll bar on the right side of the screen to move across your diary.

### **Selecting the Management Referral – Written Report Appointment:**

- Double-click on the diary row corresponding a time that the report was written.
- Press the OK button to select work appointment

### **Selecting the Client:**

- In the *Find Existing Case* window that will have appeared, complete a search to find the client's case. Details of the client's first and last name, organisation or case number can be used to locate the case.

*Note: Using the case number will yield the most accurate results.*

- Information will appear in the window relating to the client's case.
- Check that the client's case displays 'Management Referral' under the Service Type column header found on the right hand side of the window.
- Click on the client information and press the SELECT button at the bottom of the screen.

### **Confirming the Appointment Details:**

- The *Appointment* window provides details of the appointment. Information such as time/date of the appointment, personal details of the client and Activity Type can be viewed and confirmed in the *Appointment* window.
- Select the *Activity Type* 'Face to Face' from the drop down menu.
- Select the *Service* 'Management Referral – Written Reports' from the drop down menu.
- Press the SAVE & CLOSE button to lodge and confirm the time spend writing the Management Referral report.

[Return to Table of Contents](#)



# YouTube Training Videos

---

## Where to Find the Training Videos

---

Assure Programs offers video Tutorials to help guide users of the Professional Portal. Assure Programs' YouTube channel can be found via the following link:

<https://www.youtube.com/channel/UC72RxxgySjd8vG2atwTUFXg>

---

## How to Watch the Videos

---

When watching the training video the resolution might appear blurry. To increase the clarity of the image:

- Open the link to the video you wish to watch
- Press the OPTIONS button (displayed as a cog symbol) in the YouTube video player
- Press the QUALITY menu
- Select the highest resolution (480p or 720p)
- Let the video load for a few seconds
- Press Play.

---

## Overviews of the Professional Portal

---

General Overview of the Professional Portal – Length 3:12 – Published 11 Feb, 2016

[https://www.youtube.com/watch?v=u\\_Ns8R\\_IUXg](https://www.youtube.com/watch?v=u_Ns8R_IUXg)

Individual User Overview of the Professional Portal – Length 3:13 – Published 29 Feb, 2016

<https://www.youtube.com/watch?v=4yPRlxrfsFM>

---

## Diary Management

---

How to Manage a Practice Diary – Length 2:17 – Published 11 Feb, 2016

[https://www.youtube.com/watch?v=dhsB\\_8QxVHg](https://www.youtube.com/watch?v=dhsB_8QxVHg)



---

## Case Administration

---

How to book Subsequent Appointments – Length 2:08 – Published 8 Feb, 2016

[https://www.youtube.com/watch?v=D9VtnKmYY\\_A](https://www.youtube.com/watch?v=D9VtnKmYY_A)

Additional video: How to Book an Appointment into the Professional Portal

[https://www.youtube.com/watch?v=hhK\\_vko5G60](https://www.youtube.com/watch?v=hhK_vko5G60) – Length 3:12 – Published 28 April, 2016

How to Cancel Appointments in the Professional Portal – Length 5:14 – Published 28 April, 2016

<https://www.youtube.com/watch?v=vRNIAJzyo0>

How to Enter Statistics into a Case – Length 3:15 – Published 8 Feb, 2016

<https://www.youtube.com/watch?v=RJxmRTKKjQI>

How to ask for an Extension Request – (2:27) – Published Feb 29, 2016

<https://www.youtube.com/watch?v=LmkeZitDsO4>

---

## Invoice Management

---

How to Approve an Invoice – Length 2:23 – Published 8 Feb, 2016

<https://www.youtube.com/watch?v=2xnhVYO45Jg>

[Return to Table of Contents](#)



## Contact Information

The National Head office is available 8:30a.m. – 5:00p.m (EST). Monday – Friday.

For any questions about the Professional Portal please contact us on (07) 3211 8919 or email us at [info@assureprograms.com.au](mailto:info@assureprograms.com.au) or [invoices@assureprograms.com.au](mailto:invoices@assureprograms.com.au)

The Professional Portal is located at the following link:

Professional Portal URL: <http://cc001.eapcloud.com/professionalportal>

[Return to Table of Contents](#)