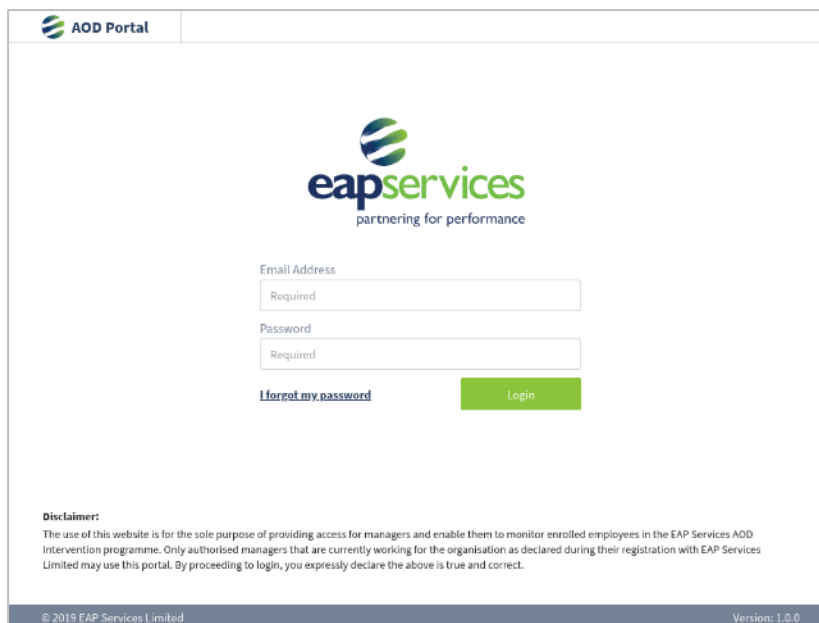


EAP Services Limited

AOD Portal – Manager’s User Guide

Contents

Change Your Password	2
Enrol an Employee	3
Register an Additional Manager	5
View a Session Report	6
View a Final Report	8
Communication and Record Keeping	10



Change Your Password

To ensure your access to the AOD Portal remains safe and secure we recommend you change your password upon first login (and subsequently on a regular basis).

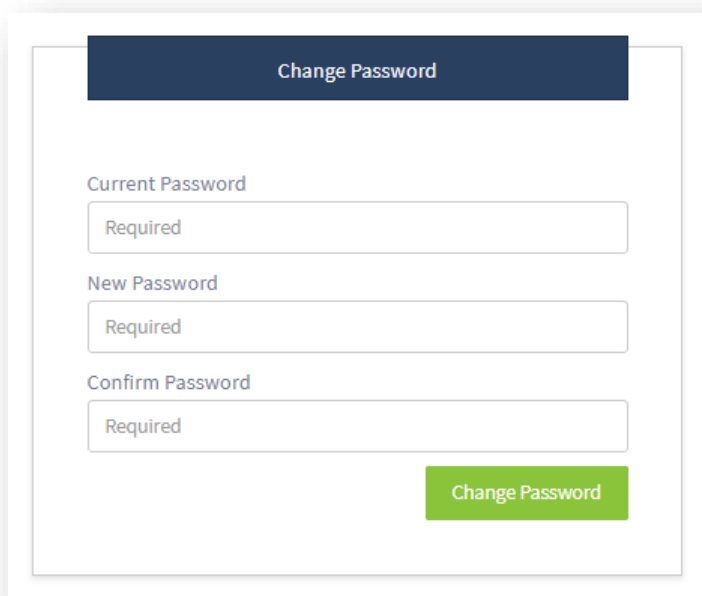
To change your password:

1. Click on the profile icon located at the top right-hand corner (next to your name) and select *Profile*.



2. Scroll down to the *Change Password* form at the bottom and complete the required fields.

For increased security the AOD Portal requires a complex password of a minimum of 8 characters and must include at least 1 lowercase letter, 1 uppercase letter, 1 number, and 1 special character (eg t@K\$%^&4).

A screenshot of the "Change Password" form. The form has a dark blue header with the text "Change Password". Below the header, there are three input fields, each with the label "Required" above it. The labels for the fields are "Current Password", "New Password", and "Confirm Password". At the bottom right of the form, there is a green button with the text "Change Password".

Enrol an Employee

To enrol an employee in the AOD Intervention programme, navigate to the homepage and select the *New Referral* button. A new tab will load and display the referral form.

New Referral

As you are the Referral Manager your details will automatically populate the form.

AOD Intervention - New Referral

Draft

Organisation: **Kiwiana Technology Limited** P/O Number:

Referral Manager: **Jocelyn Quick** Job Title: **Management**
Group: **Phar Lap** Division: **Entreaty**
Mobile: **021906114** Work Phone: **093582110**
Email: **jocelyn.quick@kiwianatechnology.co.nz**

+ Include an additional manager

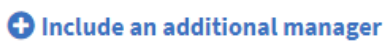
Employee Details:

First Name <input type="text" value="Required"/>	Last Name <input type="text" value="Required"/>
Job Title <input type="text" value="--Please select a job title (Required)--"/>	Location <input type="text" value="Required"/>
Mobile <input type="text" value="Optional"/>	Work Phone <input type="text" value="Optional"/>
Email Address <input type="text" value="Required"/>	

This form is to provide EAP Services with the appropriate information in relation to this Referral. The Manager(s) and the employee must sign this form; thereby agreeing for this form to be emailed to intervention@eapservices.co.nz On receipt of this form, EAP Services will contact the employee to schedule their first appointment with an EAP Counselling professional with expertise in AOD intervention programmes.

If you wish to include another manager who is already registered, in the referral process, simply click on *Include an additional manager* and select them from the list.

If another manager has not been registered, you will need to register them – please see [Register an Additional Manager](#).

 A rectangular button with a blue border and a blue plus icon on the left. The text "Include an additional manager" is in blue.

Additional Manager

--Select other manager (Optional)--

- Karen Allsopp
- Simon Diprose
- Tim Horne
- Trace Church

Now, complete the details for the Employee you are enrolling in AOD Counselling.

You can either *Save* the form and return to it later, or proceed to *Submit & Sign*.

 A green rectangular button with the text "Submit & Sign" in white.

Upon clicking *Submit & Sign* a PDF copy of the form will download to your device and the enrolment status will change to *Submitted*.

Please print the PDF document and email it to our AOD Intervention Team – intervention@eapservices.co.nz. Remember to ensure it is signed by all parties, ie yourself, the employee you are enrolling, and the additional manager (if applicable).

Register an Additional Manager

All registered Referral Managers can add additional managers for the purposes of populating their details in future AOD Enrolment forms.

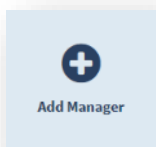
Please note that registering an additional manager does not provide them with access to the online AOD Portal – it simply provides a means to quickly populate their details for any future referrals. If you require them to have access, please email our AOD Intervention Team – intervention@eapservices.co.nz.

To add an additional manager:

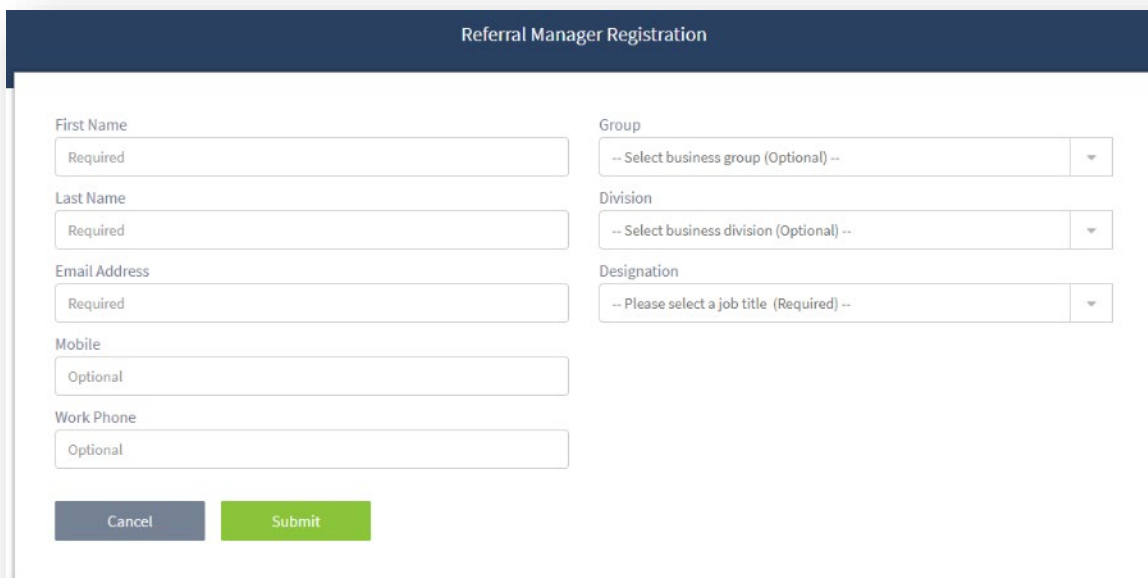
1. Click on the *Manager Directory* tab located at the top of the page.



2. Now, click on the *Add Manager* icon.



3. A *Referral Manager Registration* page will open.

A screenshot of a web form titled 'Referral Manager Registration'. The form is divided into two columns. The left column contains text input fields for 'First Name' (Required), 'Last Name' (Required), 'Email Address' (Required), 'Mobile' (Optional), and 'Work Phone' (Optional). The right column contains dropdown menus for 'Group' (with the placeholder '-- Select business group (Optional) --'), 'Division' (with the placeholder '-- Select business division (Optional) --'), and 'Designation' (with the placeholder '-- Please select a job title (Required) --'). At the bottom of the form are two buttons: 'Cancel' (grey) and 'Submit' (green).

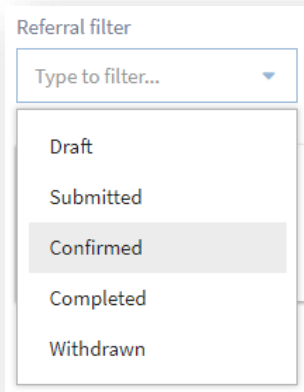
4. Complete all the required fields. When you're satisfied the information you have entered is correct, click *Submit* to save the additional manager's details.

View a Session Report

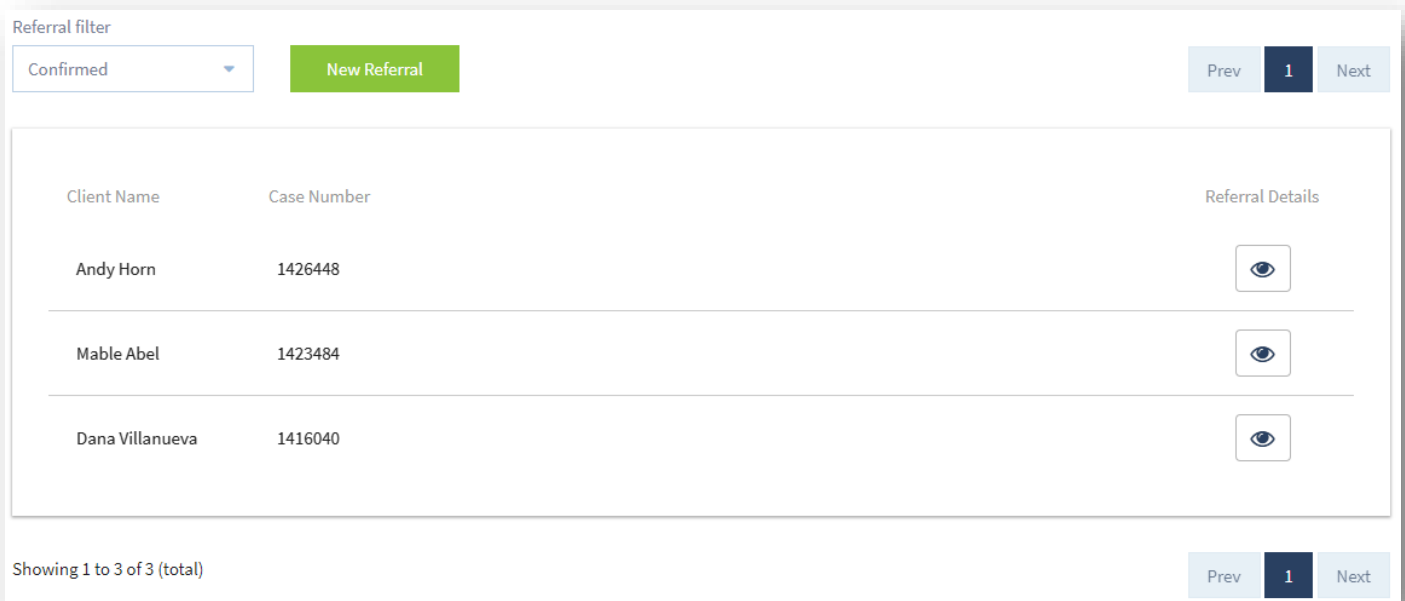
Upon completion of each employee's EAP session you will receive email notification advising that the Session Report is ready to be viewed.

To view a Session Report:




1. From the homepage, navigate to the referral filter and select *Confirmed*.



You will see a full list of employees you have enrolled for AOD counselling.



A screenshot of the 'Referral filter' page. At the top, there is a 'Referral filter' dropdown menu set to 'Confirmed', a green 'New Referral' button, and navigation buttons 'Prev', '1', and 'Next'. Below this is a table with three columns: 'Client Name', 'Case Number', and 'Referral Details'. The table contains three rows of data. At the bottom, there is a pagination bar showing 'Showing 1 to 3 of 3 (total)' and another set of navigation buttons 'Prev', '1', and 'Next'.

Client Name	Case Number	Referral Details
Andy Horn	1426448	
Mable Abel	1423484	
Dana Villanueva	1416040	

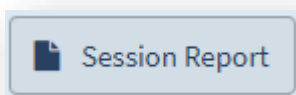
2. Click on the Name associated with the Session Report you wish to read.

Referral filter: Confirmed | New Referral | Prev 1 Next

Client Name	Case Number	Referral Details
Alex Kent	1422869	

Session No.	Appointment Date	Time From	Time To	Programme Status	
1	24/07/2019	3:45pm	4:45pm	Session report available	Session Report

Where a Session Report is available you will see a Session Report icon.



Click on this icon and the Session Report will open in a new tab.

AOD Intervention Programme - Session Report

Reviewed

Organisation: Kiwiana Technology Limited | Report Date: 15/08/2019

Referral Manager: Jocelyn Quick | Division: Entreaty
Client: Betty Boop | Reference No: 1425712
Professional: Doctor Abbott | Location: Cambridge

Session No: 1 of 6 | Date: 15/08/2019 12:30PM
Recommended Sessions: 6 | Additional Sessions: 0

Betty attended on time and in an engaging motivated manner.

I found Betty was motivated and committed to remaining alcohol & drug free in the workplace.

Betty is aware of their organisation's drug and alcohol policy.
The date of suggested re-testing is during the course of the next two months.

The next appointment date/time is 15/08/2019 2:45PM.

Close

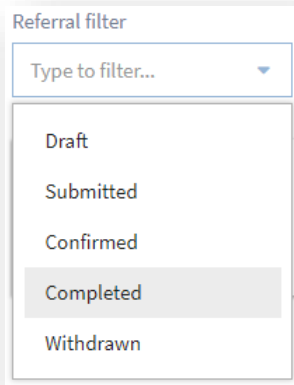
View a Final Report

Upon an employee successfully completing the AOD Intervention Programme, a final report will be completed by the counselling professional.

You will receive email notification when this Final Report is available for you to access.

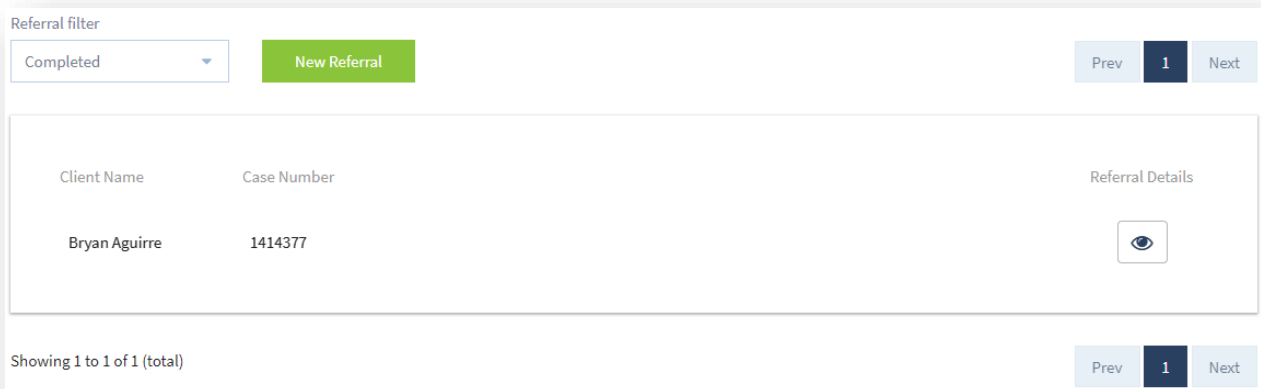
To view a Final Report:

1. From the homepage, navigate to the Referral filter and select *Completed*.




A dropdown menu titled "Referral filter" with a search input field "Type to filter...". The menu is open, showing a list of options: Draft, Submitted, Confirmed, Completed (highlighted), and Withdrawn.



You will see a full list of employees who have Completed their AOD Programme.



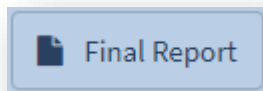
A screenshot of a web interface showing a list of referrals. At the top, there is a "Referral filter" dropdown set to "Completed", a green "New Referral" button, and pagination controls "Prev 1 Next". The table below has three columns: "Client Name", "Case Number", and "Referral Details". One row is visible with the client name "Bryan Aguirre" and case number "1414377". The "Referral Details" column contains an eye icon. At the bottom, it says "Showing 1 to 1 of 1 (total)" and has another set of pagination controls "Prev 1 Next".

Client Name	Case Number	Referral Details
Bryan Aguirre	1414377	

2. Click on the Name associated with the Final Report you wish to read.

Client Name	Case Number	Operation	Referral Details		
Bryan Aguirre	1414377				
Session No.	Appointment Date	Time From	Time To	Programme Status	

Where a Final Report is available you will see a *Final Report* icon located at the top of the list.



3. Click on this icon and the final report will open in a new tab in your browser.

Communication and Record Keeping

Referring managers will receive email notifications to advise:

- confirmation of an employee's enrolment in the AOD Intervention Programme
- confirmation of all scheduled appointments
- any change to an employee's scheduled appointment
- if an employee did not attend their appointment
- that a Session Report is now available to view
- that a Final Report is now available to view.

An employee enrolled in an AOD Intervention Programme will receive email confirmation of all scheduled appointments. Where an employee does not have an email address, we require an alternative email address to be provided and for the recipient of that alternative email to ensure the content reaches the employee for whom it is intended.