EAP Services Limited

AOD Portal – Manager's User Guide

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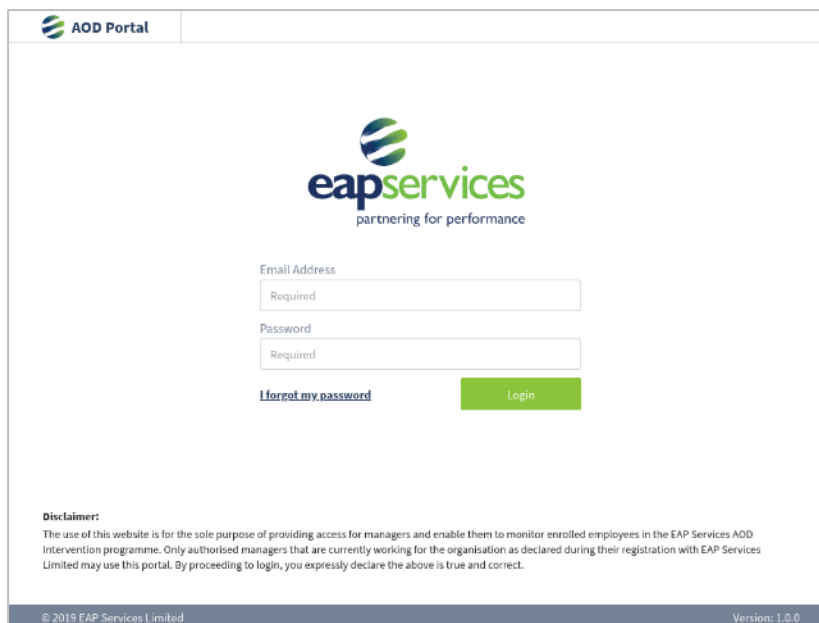
Change Your Password

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).
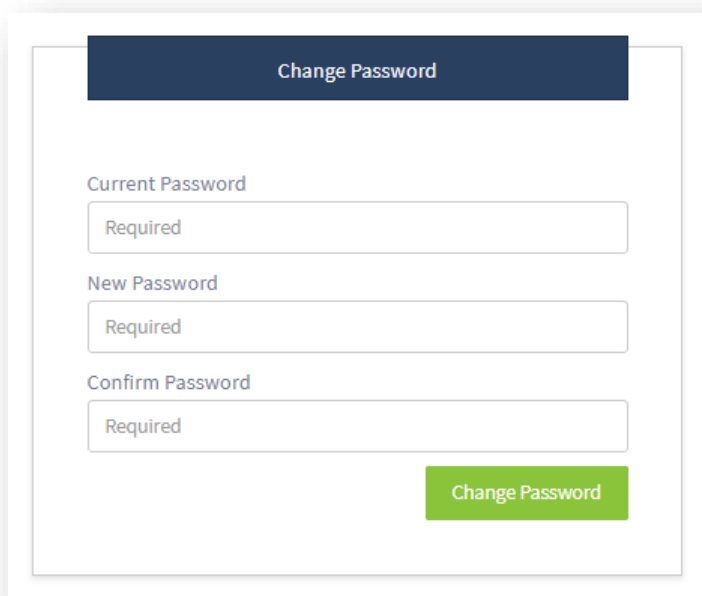
To change your password:

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).

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.

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

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.

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*.

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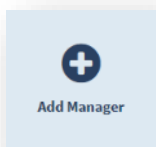
Please note that registering an additional manager does not provide them with access to the online AOD Portal – it simply provides a means to quickly populate their details for any future referrals. If you require them to have access, please email our AOD Intervention Team – intervention@eapservices.co.nz.
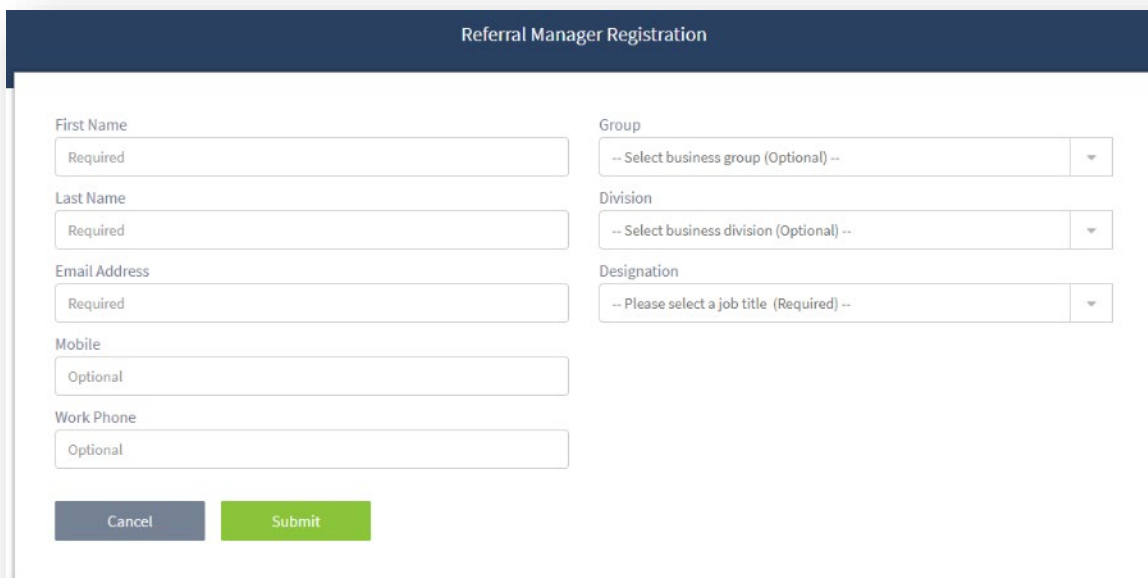
To add an additional manager:

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

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

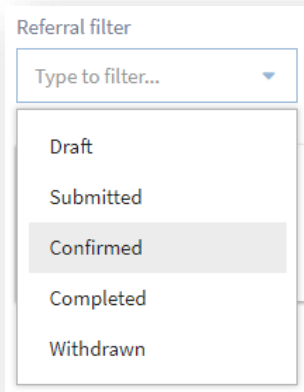3. A *Referral Manager Registration* page will open.

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.
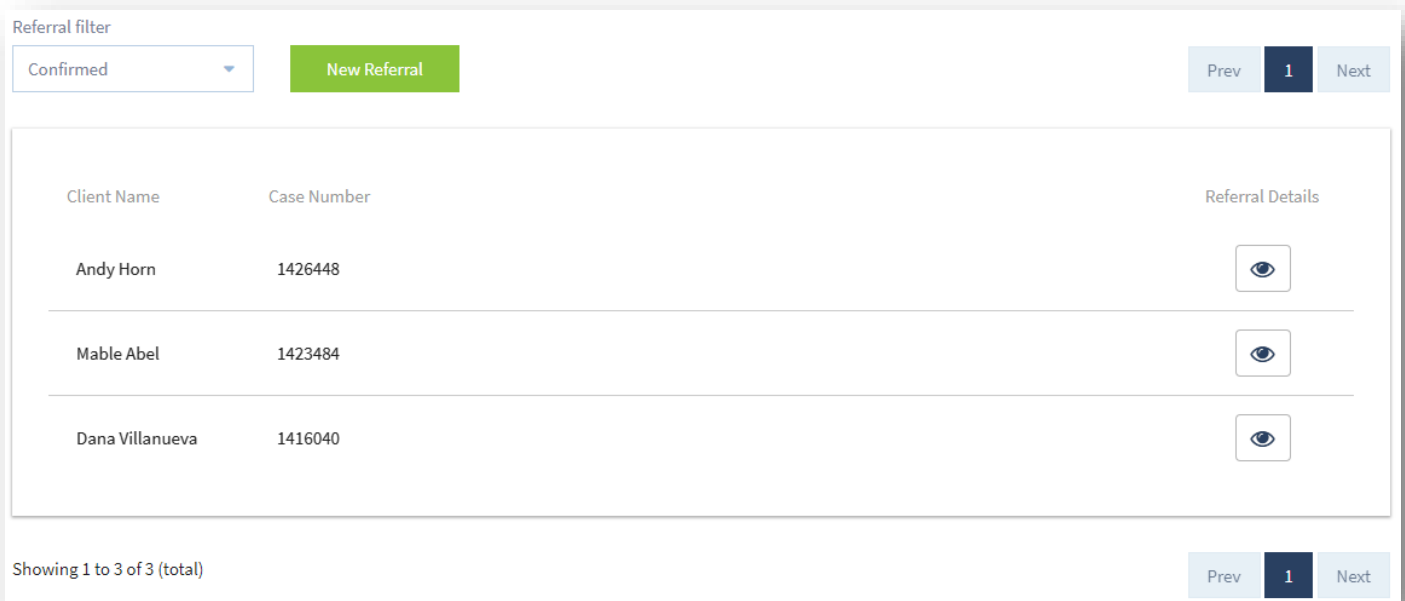
View a Session Report

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.

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

Where a Session Report is available you will see a Session Report icon.
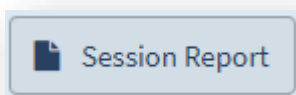
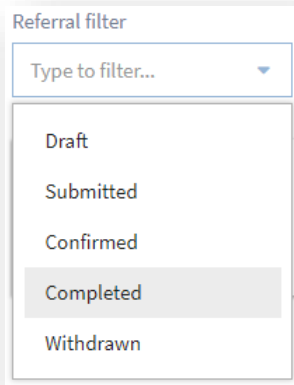Click on this icon and the Session Report will open in a new tab.

View a Final Report

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

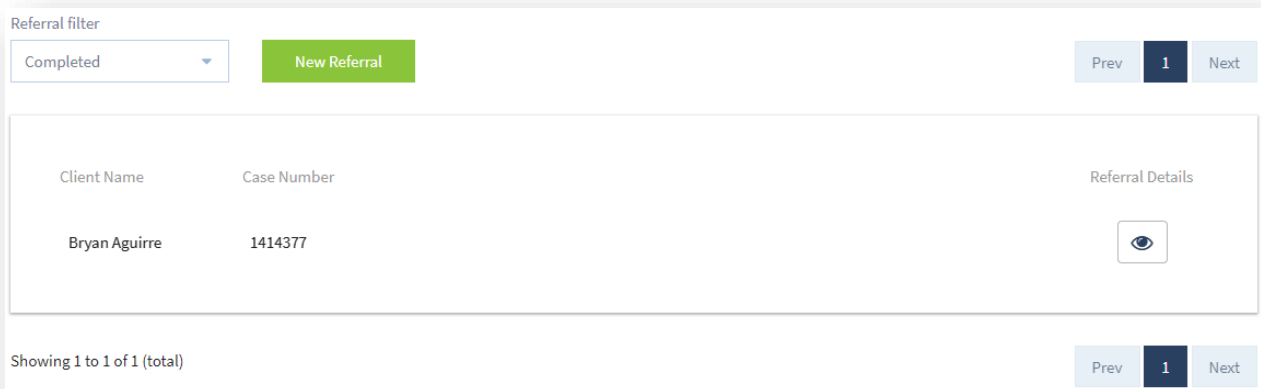You will receive email notification when this Final Report is available for you to access.

To view a Final Report:

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

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

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

Where a Final Report is available you will see a *Final Report* icon located at the top of the list.
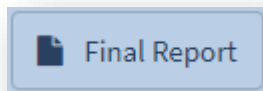
3. Click on this icon and the final report will open in a new tab in your browser.

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.