EAP Executive Software
New Functionality and Features

October 2024

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Functionality

Audit Log

Having an audit log on a system for providers of counselling and mental health services offers several advantages:

1. **Enhanced Accountability:** An audit log keeps track of all actions taken within the system, ensuring that all changes and updates are traceable. This creates accountability among staff and helps maintain professional standards.
2. **Data Security and Compliance:** It helps ensure compliance with data protection regulations, such as Australian privacy laws, by recording access and modifications to sensitive information. This can protect providers from legal issues related to unauthorised access or data breaches.
3. **Fraud Prevention:** By tracking every action, audit logs help detect and prevent unauthorized activities or potential misuse of the system, reducing the risk of fraud or data tampering.
4. **Clinical Quality Control:** It supports quality control by maintaining records of interactions and data changes, enabling providers to review and verify actions taken, which can be crucial for maintaining high standards of care.
5. **Improved Trust with Clients:** Audit logs demonstrate a commitment to transparency and data security, which can improve trust between clients and providers, especially when dealing with highly sensitive personal information.
6. **Regulatory Audits:** It simplifies compliance with regulatory audits and external reviews, providing evidence that the organisation adheres to privacy and security protocols in handling sensitive client data

Functionality

Improvements to Appointment Action Tracking

Two new tracking features have been added for appointment related events.

- Appointment Deletion Log - When an appointment is deleted via the professional portal or provider manager, the user is prompted to select a deletion reason. This information is compiled in a log for ad-hoc analysis.
- Appointment Move Tracking - It's important for counsellors and case managers to monitor the frequency and reasons for appointment rescheduling. Some scenarios may limit the number of permissible moves. The diary now displays the count of moves, and a detailed log is accessible in the appointment history.

Track how many times an appointment has been moved

Providers aim to improve their appointment scheduling to reduce client dissatisfaction and operational inefficiencies caused by frequent rescheduling. We have integrated a tracking feature into the scheduling system to monitor how often appointments are rescheduled. The system logs each change, including the reason and the number of times the appointment has been moved.

- Accountability – Record keeping – maintains a clear record of appointment changes, which can be useful for audits, compliance and resolving disputes.
- Client Trust – Demonstrates a commitment to maintaining an organised and transparent scheduling system.
- Operational Continuity – Ensures the service delivery remains consistent and minimally disrupted by frequent appointment shifts.
- Revenue Assurance – Frequent changes can impact billing cycles and cash flow. Tracking helps manage and mitigate these financial disruptions.
- Cost Management – Identifies inefficiencies that could be leading to additional costs such lost revenue due to client cancellations.

Functionality

Adding Red Flag capability on client level in addition to per case

Red flags have long been a feature of our system, and recent enhancements have increased their utility. The use and interpretation of red flags are determined by our customers. We ensure visibility across the system, in queries, searches, and when opening a case.

It's crucial to inform counsellors when a client is deemed high-risk, and this designation should persist across all their cases, present and future. At present, red flags are case-specific. However, there's a need for a client-specific flag that alerts counsellors to exercise special consideration for the individual.

Enable associates to have different rates depending on modality and location

Associates can charge different rates for different types of services. For example, a person-to-person counselling session might differ from a technology based session and a critical incident.

- Flexibility – Allows for more tailored pricing models that reflect different services and locations.
- Accuracy – Ensures that billing reflects the appropriate rate for each service and location, preventing overcharges or undercharges.
- Competitiveness – Helps the Provider remain competitive by setting rates that are aligned with local market conditions and specific service demands.

Example:
An associate providing counselling might charge $100 per session in a suburban area but $150 per session in a different location due to higher overhead costs. Similarly, they might charge $120 for a specialized therapy session in one location and $140 in another, reflecting the differences in service type and pricing strategies.

Functionality

Announcement board on the Professional Portal

This new functionality in the system is designed to streamline communication and improve case management efficiency. The Announcement Board will allow counsellors to receive real-time notifications about new cases available for assignment. This ensures that no case is overlooked and that all counsellors are promptly informed about opportunities to pick up new cases. The system allows for quick and easy access to case details, enabling counsellors to assess and accept cases that match their expertise and availability.

- Improved Communication – Reduces the need for emails or phone calls, streamlining the notification process and ensuring all counsellors receive the same information simultaneously.
- Reduced Overhead – Decreases administrative workload by automating the notification process, allowing support staff to focus on other tasks.
- Immediate Awareness – Counsellors can instantly see new cases that need attention ensuring timely pick-up and response.
- Efficiency – Quick and easy access to new case information allows counsellors to respond faster, improving overall case management efficiency.
- Transparency – All counsellors have equal access to case notifications, promoting fairness and transparency in case distribution.
- Flexibility – Counsellors can view and pick up cases at their convenience, accommodating their schedules and availability.
- Enhanced Coordination – Facilitates better coordination among counsellors, especially when handling multiple cases, ensuring no case is overlooked.
- Real time Updates – Instant updates on the announcement board mean counsellors are always aware of the latest cases, reducing delays in service delivery.
- Accessibility – with online portal, counsellors can access the announcement board from anywhere, providing flexibility for remote work or on-the-go updates

Functionality

Associates able to update their registration/credentials on the Professional Portal

This new feature on our Professional Portal allows associates to update their registration and credentials directly. This functionality empowers associates to keep their professional information current, ensuring that their profiles accurately reflect their qualifications and certifications. By allowing associates to manage their own data, we enhance the accuracy of their records and reduce administrative overhead. This supports a more efficient and reliable system benefiting both associates and the Providers they serve.

- Self-Service Capability – enables professionals to independently manage and update their profile and credentials, reducing dependency on administration.
- Accuracy – Professionals can ensure their information is up-to-date and accuracy reflecting their current qualifications, certifications and specialities.
- Time Efficiency – Streamlines the process of updating credentials, saving time for both professionals and admin staff.
- Immediate Updates – Allows for real-time updates, ensuring that the most current information is available without delays.
- Compliance – Helps maintain compliance with industry regulations by ensuring that all professional's credentials are current and valid.
- Professional Development – Encourages associates to keep their skills and certificates up to date, promoting continuous professional development.
- Improved Communication – Reduces the need for back-and-forth communication between professionals and admin staff regarding credential updates.
- Centralised Information – Consolidates all credential information in one place, making it easier to track and manage.
- Audit Readiness – Ensures that the organisation is always ready for audits by having up-to-date credential information readily available.

Functionality

Associates able to update their registration/credentials on the Professional Portal (cont)

- Increased Transparency – Promotes transparency within the organisation by allowing professionals to see and manage their own credential information.
- Enhanced Trust – Builds trust in the system by giving professionals control over their professional information.
- Reduction of Errors – Minimizes the risk of errors that can occur when credential updates are handled manually by admin staff.
- Accessibility – Associates can update their information from anywhere, providing flexibility and convenience.
- Motivation – Encourages associates to stay engaged with their professional development by making it easy to update and showcase their credentials/specialities.

Add a field to Associates regarding Work H&S Status

A Work Health and Safety check list is available. This status will then be used as a filter when searching for appropriate counsellors to do the job.

Earmarking Associates Based on Industry Sector

Associates can focus on their area of expertise, leading to a higher quality service and more effective solutions.

This encourages innovation by allowing associates to focus on industry-specific challenges and develop targeted solutions.

Functionality

- Efficiency – Reduces the time needed to assign cases or projects as associates are already categorized based on their industry knowledge.
- Customer Satisfaction – Customers receive tailored support from associates who understand the specific challenges and needs of their industry.
- Better Resource Allocation – Ensures that the right associates are assigned to the right cases, maximising resource utilisation and efficiency.
- Enhanced Collaboration – Associates within the same industry sector can share knowledge and best practices, fostering a collaborative environment.
- Improved Performance – Associates can achieve better outcomes by leveraging their specialised knowledge and experience in a particular industry such as mining.
- Targeted Training – Training programs can be customised to address the specific needs and trends of different industry sectors.
- Market Insight – Associates gain deeper insights into industry trends, enabling the organisation to anticipate market changes and respond proactively.
- Customer Trust – Builds customer trust as they perceive the associates as knowledgeable and experienced in their specific sector.
- Competitive Advantage – Provides a competitive edge to offering industry-specific expertise, which can be a differentiator in the market.
- Enhanced Communication – Improves communication between associates and clients as they share a common industry language and understanding.

Functionality

Ability to add multiple specialisations, registrations, qualifications, and languages

Associates are likely to be more engaged and motivated when they can showcase their full range of skills and qualifications and see them utilised effectively. This will also build customer trust and confidence in the Provider's capability to handle complex and varied requirements by having highly qualified and multi-specialised associates.

- Enhanced Matching – Increases the likelihood of matching clients with associates who have the exact skills and qualifications need for their specific requirements.
- Broader Service Offering – Allows the Provider to offer a wider range of services by leveraging the diverse skills and qualifications of their associates.
- Professional Growth – Encourages associates to continue their professional development by adding new skills, qualifications and languages, fostering a culture of continuous learning.
- Better Resource Allocation – Facilitates efficient assignment of associates to cases based on their specialities.
- Regulatory Compliance – Ensures that associates meet necessary industry regulations and standards which vary by specialisation and qualification, enhancing overall compliance.
- Language Diversity – Expands the organisations ability to serve a multicultural client base by having associates who speak multiple languages, improving communication and service delivery.

Search for manager name in case summary

This feature allows users to quickly locate and review case summaries by searching for the name of the manager associated with a particular case.

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A manager is someone appointed by the customer to refer people for sessions. This is for customers that don't allow self-referral. You can quickly find all cases managed by a specific manager which saves time and effort.

- Enhanced Collaboration – Admin users can identify which manager is handling a case for better communication and coordination.
- Accountability – Enhances accountability by making it easy to track which manager is responsible for each case.
- Data Organisation – Keeps case information well-organised and easily accessible based on managerial assignment.

Added 'opt out for all client email types'

Added functionality allows clients to opt out of receiving specific types or all types of emails from the system. This feature is designed to provide clients with greater control over the communications they receive, ensuring compliance with email marketing regulations and enhancing user satisfaction.

This feature not only benefits clients by respecting their communication preferences but also helps organizations maintain a positive relationship with their client base.

Search for clients with contact details

You can now quickly search for clients using phone number and email.

Functionality

Link cases across different service types

The functionality to link cases across different service types allows associates to connect related cases, regardless of the specific service provided. This feature ensures a comprehensive view of a client's interactions and history, facilitating better coordination and more informed decision-making.

When viewing a case, associates can see links to other related cases and quickly navigate between them. Details from all linked cases are accessible, providing a comprehensive view of the client’s situation.

- Unified Client View – Associates can see a complete picture of a client’s interactions across various service types (e.g. counselling, legal advice, manager assist). This view helps associates understand the client’s history leading to a more personalised and effective support.
- Improved Case Management – Associates can manage linked cases more efficiently, as they can track progress in one place. This streamlines workflow by reducing the need to switch between different service types to get information.
- Informed Decision Making – Access to linked cases allows associates to make better-informed decisions, as they have a broader understanding of the client’s needs and issues. It helps identify potential risks and opportunities for intervention across different services.
- Efficiency and Time Saving – Reduces duplication of effort as associates do not need to collect the same information multiple times for different service types and this saves time by allowing associates to quickly access all relevant case information from the one screen.

Functionality

Add Insurance to a Professional's profile

Adding an insurance field to a counsellor's profile within the system provides numerous benefits, including better record keeping and increased credibility. By improving operational efficiency and ensuring accurate insurance information, this feature supports both counsellors and Providers, leading to a more effective system.

Added a drop-down box in additional session requests, to promote consistent terminology

Adding a drop-down box for additional sessions requests in the system offers several key benefits, particularly in promoting consistent terminology. This enhancement can significantly improve data accuracy, user experience and overall efficiency.

Drop-down boxes limit users input to predefined options, reducing the risk of typos, misspellings and variations in terminology. Drop-down menus simplify the process for users by providing a list of acceptable terms, making it easier to complete forms quickly and correctly.

API for generating professional employee's productivity

An API (Application Programming Interface) designed for generating professional employee productivity metrics serves multiple purposes and offers a range of benefits for organizations. This API can automate the collection, processing, and analysis of productivity data, providing valuable insights into employee performance and organizational efficiency.

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Support for couples counselling

The system can link cases between family members. This means that you can control the session allowance between the linked cases on a per contract basis. For example, if the shared allowance is three, then the system will limit the combined total sessions for all linked cases to three.

The benefits of linking cases of family members include:

- Comprehensive Understanding – Counsellors gain a more complete picture of the family dynamics and issues that may be affecting each family member. Many issues that affect one family member can also impact others. By linking cases, counsellors can address these interconnected issues more effectively.
- Consistent Approach – Ensures a consistent therapeutic approach is applied across different counsellors who might be working with various family members.
- Integrated Care Plans – Facilitates the creation of integrated care plans that address both the individual and family-wide issues.
- Controlled Access – Allows for controlled access to sensitive information ensuring that only authorised counsellors can view specific details, thereby maintaining confidentiality.
- Informed Consent – Helps in managing informed consent and confidentiality agreements more efficiently when dealing with multiple family members.

Associates can check their rates

Feature: The Professional Portal allows associates to view their current rates. This ensures that associates can easily verify the accuracy of their rates, reducing the risk of discrepancies and improving transparency between associates and the organisation.

Functionality

Audit Trail

The audit trail automatically records and logs all user actions, changes and system events within the application. This includes details such as who made the change, what was changed, when it was changed and in some cases, why the change was made. This logging occurs continuously and is stored in a secure, tamper-proof manner, ensuring that the history of activities is preserved for future review and analysis.

The benefit of having an audit trail on the Provider Manager is that it provides a detailed record of all actions and changes made within the system. This enhances security and accountability by allowing providers to track who did what and when, helping to detect and investigate unauthorized activities, ensure compliance with regulations and maintain data integrity. It also supports troubleshooting and process improvement by offering a clear history of system interactions.

Date of birth search in the system

The Date of Birth (DOB) functionality has been integrated into the system, allowing you to perform searches based on DOB.

To ensure this feature works effectively, it's important to maintain accurate DOB information within the system.

You can utilise this feature to conduct searches and queries, and there is an option to export the results to Excel.

Features of having a DOB search:

1. Targeted Search Capabilities: Enables users to search records based on an individual's date of birth, improving search accuracy and efficiency.

Functionality

2. Improved Record Matching: Facilitates matching of records by cross-referencing date of birth, reducing errors when multiple individuals have similar names.

3. Data Validation: Helps in verifying the accuracy of records by cross-referencing dates of birth against other personal information.

Benefits of having a DOB search:

1. Enhanced Efficiency: Streamlines the process of locating and verifying individual records, saving time and reducing manual effort.
2. Increased Accuracy: Minimizes the risk of errors in identifying individuals with similar names, ensuring that the correct records are retrieved.
3. Better Data Management: Supports more effective organisation and management of records by allowing for more granular searches based on age or date of birth.
4. Compliance and Security: Assists in meeting regulatory requirement for accurate data handling, reducing the risk of non-compliance with data protection laws.