

# e-therapy – Therapist Manual

Welcome to e-therapy! This user guide will take you through setting up and using your e-therapy sub-domain for online therapy sessions. In a few steps you will learn how to:

**Register**

**Edit your profile & set up your e-therapy system**

**Create session times & create your own templates**

**Accept /decline bookings from clients**

**Use the chat interface**

**View, Save and Search chat logs from sessions ... and more**

All therapists who register with e-therapy receive their own sub-domain where clients can login and make bookings. In addition, therapists can be easily located via the main e-therapy website (Therapists >> List Therapists).

## How to Register

To create your own therapist account with e-therapy – simply go to the e-therapy website at:

[www.e-therapy.com.au](http://www.e-therapy.com.au)

Click on the **Therapists** menu item at the top of the page & select **Register**. You will arrive on a page with a registration form, where you enter your details:

1. Enter your **email** address – this will be used by the e-therapy admin to contact you and also by your clients. Your **email address** will be used as your account login.
2. Select a **password** & confirm by retyping it – you will use this whenever you login to your therapist sub-domain, so make sure you keep your password in a safe place.
3. Enter your hourly rate (you can leave this blank if you do not wish to take payments online) you can change your hourly rate at any time.
4. Select your preferred **sub-domain name** – if clients know you by your name or if you have a business name, you may wish to use it here. Keep in mind that shorter names are easier to remember & please note: **NO SPACES** in your sub domain name. Enter your personal information in the fields provided.
5. Select which plan you want to register with (you can view available options on the Plans page), and then choose your preferred payment option. If you select offline payment, you will receive instructions on how to pay after submitting your registration

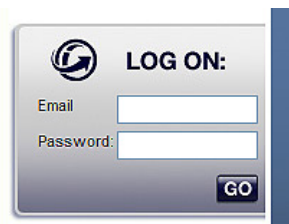
form. To pay online select your preferred payment gateway. If you select Paymate or Paypal you will be able to use your credit card to pay for your registration.

Once you have selected your preferred payment gateway – enter the security code you see on the page – this is to ensure a human being, not a computer, is filling out the registration form. Before you click the '**Submit**' button at the bottom of the page, make sure that you read the **Terms and conditions** and tick the box that you accept the terms.

When your registration has been submitted and confirmed, you will receive a confirmation email with a link to login and activate your e-therapy account and sub-domain. This email is sent to verify your email address and to complete the registration process.

Go to [www.e-therapy.com.au](http://www.e-therapy.com.au)

Enter your email address and password in the login box on the right side of the screen:



You can now customise your profile, create sessions and get started using the e-therapy system.

When you login you will notice that the top menu has expanded to include more functions:



### The menu tabs in brief:

1. **Home** – this takes you to the home page on the main e-therapy site
2. **Profile** – this is where you edit your personal information
3. **Sessions** – create/view available sessions, search chat logs & set up templates.
4. **Clients** – view details about clients who have registered with you.
5. **Questionnaires** – use this tab to create questionnaires for your clients.
6. **Plans** – view the available plans on the e-therapy system & place your order
7. **Logout** – click this tab to logout from the system
8. **FAQs** – useful information for both therapists & clients
9. **Contact** – please feel free to use the form to contact e-therapy site admin.

When you login you arrive on the sessions page, but before we look at that we'll have a quick look at customising your profile:

# How to edit your profile

Click the **profile** tab in the top menu bar and select the function you require from the dropdown menu (Profile >> Edit Profile).

- **Edit Profile** – edit your personal information
- **Change Password** – use this to update your password
- **Change Email** – use this to update your email address (confirm with password)
- **Renew** – this is where you renew your account subscription
- **Dashboard** – an overview of your account including clients, booked sessions etc

## Edit Profile

### Personal information – available hours – personal photo – questionnaire:

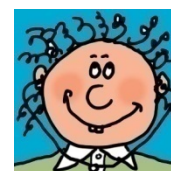
The top of this page contains your **personal information**; email address and address details, which you can easily update by typing over the text in the form fields.

This section also contains your **available hours**, make sure to edit this as the default setting may not be your preferred hours – clients will not be able to book sessions unless you have created them, but it still makes sense to enter the time frame you expect to be available online. This is to provide a ‘range’ of hours within which you may be available. You do not need to have sessions scheduled throughout this time on every day, but it does allow you to add sessions at any time within this ‘range’. **Note:** time needs to be entered in the 24 hour format, so if you are available from say 8:00 am through to 3:30 pm, you would enter this as: **Available from** – 08:00 **Available to** – 15:30. You cannot enter 00:00 to 24:00 as a time ‘range’ as they are the same time.

Next on the edit profile page you can upload a **personal photo**.

Click the browse button to upload a photo from your computer – note that the recommended size is 300 x 300 pixels.

*You can upload a different size as long as the image is **square**.*



If you want your clients to complete a **questionnaire**, tick the box and select which questionnaire from the dropdown box.

**Note** you will need to create a questionnaire before it appears in the dropdown box (see how to create questionnaires further down in this guide).

## Edit your profile and contact page text:

On your edit profile page there are 2 text editors allowing you to type and edit the text to show on your **Profile** page and your **Contact** page.

**Please Note:** Make sure to click the **Submit** button after making changes to either your profile or contact page text – if you leave the page without submitting, any changes you made will be lost.

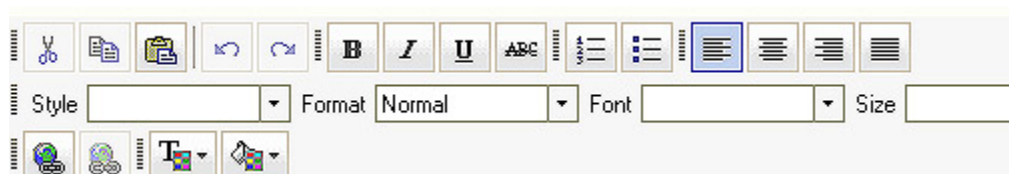


## How to use the text editor

**Please note:** if you are copying text from an existing document, make sure that you first copy and paste your text into a simple text editor like Notepad. This 'extra' step is required to remove the formatting used in for example Word™, which tends to interfere with online text editors & make the text on the page look strange. Once you have pasted the copied text into the about box (or contact box), you can then use the text editing toolbar to make the text display the way you want it to 😊

You can **type directly in the editor** window and format the text into paragraphs, or create headings to make it more interesting.

## The text editor toolbar:



The main functions in text editor toolbar (shown above) are explained below:

To make text **bold** – select the text & click the **B** icon

To make text *italic* – select the text & click the *I* icon

To underline text – select the text & click the U icon

To create a numbered or bullet list – use either the number or bullet list icon

To center or right align or justify text (left-align is default) – select text & use the icons top right of the toolbar

Use the **Format** dropdown to change selected text & create different heading sizes; select text you want to change & click the arrow to view & select the heading you want.

To create a **link** (a hyperlink to a page on your sub-domain or an external web page) – type the link text (for example 'click here'), then select the text and click the hyperlink icon (bottom left on the toolbar – looks like a globe with a magnet). A small popup window will appear - in this window type the web address of the page you want to link to. You will need to select for this link to “open in a new window”, which is provided as one of the options under the Target tab. When you click OK, the link text you selected previously will appear as a link.

### **Saving your profile changes:**

Make sure that you **save** any changes you made to your profile before you leave the page.

### **Payment Options – second tab on profile page**

Edit your payment gateway details by clicking the second tab at the top of your Profile page.

The e-therapy system is currently configured to allow payments through the Gateways shown in the dropdown list. There is also an 'offline payment' option provided for clients when they are making a booking. If they select that, they will be taken to the 'Offline Payment Options' page which you will need to edit to provide them with the appropriate banking or cheque details. You can also add information on that page about rebates, insurance options and so on.

### **To edit the offline payments page:**

1. Click the link below the info text.
2. Type and format the text you wish to show on the offline payments page.
3. When you are done, click the submit button.
4. Once the page is successfully updated, you will return to the edit profile page & a message on the page will inform you that the offline payments page was updated.

## **Professional Accreditation**

There is also a function which allows you to upload PDF documents (professional accreditations etc). The title you enter for each document will become a link on your therapist profile page for visitors to click and download as they choose.

Under **Profile** (in the top menu) – select **Professional Accreditation** to upload your credentials in PDF format. You can upload up to 10 files.

To upload a new file – simply click the add file link, enter the title for the document and click the choose file button to locate the file you want to upload (maximum file size: 1MB – must be PDF). Make sure to click the Submit button to upload and save the file.

# How to manage clients

Click the Clients tab in the top menu to view the list of clients who have registered with you. Click the view link next to a client name to view the details and any sessions you have booked and/or completed with the client (you can also manage these sessions by clicking the required icon in the actions column, such as view session log or view order).

## Notes

The note function allows you to add notes to any client at any time. These are date stamped, similar to blog comments. To add a note to a client – click the view icon to bring up their details. Below client details and sessions there is a text field for creating a new note. Type your note and click the submit button to save.

## Invite Clients

You can use the **invite clients** function to send a message to clients you would like to invite to use your e-therapy service. Simply enter their email in the field provided, type your message and click send. An invitation to register will be sent to the email address you entered.

If the client chooses to register, you will be sent a notification email when he/she registers.

# How to create and manage sessions

Click the **Sessions** tab in the top menu bar - in the dropdown you will see a number of choices (as with the profile tab) – for now we want the **Create/View Sessions** option:

*You must create sessions first. You will be able to create sessions only within the hourly 'range' you have set in your profile.*

*When you have created sessions for a particular day, you will be able to save them as a 'Day Template'. The option to create a 'Day Template' will NOT appear until you have created some sessions.*

*When you have created sessions for a particular week, you will be able to save the week as a 'Week Template'.*

*This will take a little bit of time to do initially, but should save a lot of time in the long run. You may have several different 'Week Templates' that you can use at any given time, as you may have several different 'Day Templates'. As long as no one has booked sessions on a particular day, you can also overwrite that day's sessions with any other template, and this*

*can also be done for entire weeks, so the system allows a great flexibility... as long as you spent the time setting up your templates.*

*Note: It is probably advisable to allow some time (perhaps 15 minutes or more) between sessions, to allow you to make notes or to give yourself the flexibility to extend a session if you need more time with a client.*

The **Create/View Sessions** page allows you to quickly set available session times. For each session you create you can specify if you want the client to fill out a questionnaire, and if you require payment for the session (we will be covering questionnaires soon, but please note that if you do want to use a questionnaire – it will need to be created before you create the available session). You can also assign the session to a specific client.

Assigning a session to a specific client removes the need for the client to book online. This is particularly useful in a situation where your clients book and pay in your office or over the phone, or where you simply need to create a free session for a specific client. When a session is created **for** a client, a notification email is sent advising of the session time with an appropriate link.

Your clients will need to register online (on your sub-domain). When they have registered – you will be able to assign sessions to them.

The top of the create sessions page contains a status guide and a calendar – to create sessions in the future, you can use the calendar to locate the day(s) you wish to set up.

**Note:** All times need to be entered in the 24 hour date format.

## **How to create a new session:**

1. Select the date you want to create the session
2. Enter the start & end times (either in the time boxes provided – or use your mouse to select the timeslot in the session creator above – to select a block of time, use Ctrl + left mouse-click to highlight the different 15 minute blocks).
3. Tick if you require a questionnaire to be filled out & if you require payment
4. If you are assigning the session to a client directly – select client from dropdown list (note client needs to be registered before they will appear in the list).

When you have entered all the information – click submit to save the session. You will see that the new session appears in the mid section of the page – with status set as Free.

This means the session is free for clients to book (unless it was assigned to a specific client in which case it would say Booked). A notification will also appear at the top of the page – letting you know that the session was created successfully.

When a client attempts to book a session (from your listed free sessions) the status of that session will change to Pending. As a therapist you will receive an email notifying you that a client has booked a session. To accept the booking – simply click the link in the email, login

and approve the booking request. The status will change to Booked.

If your plans have changed and you need to decline the booking, simply click the decline button. You have the option of including a message for the client if you wish to send them a note.

## Notes

You can add a note relating to any session, these notes are date stamped, similar to blog comments (same as with the client notes described above). You can write the note with the session booking is confirmed, or when the session is underway. Notes are stored with the session logs for future reference.

## The Day template

Let's say you have a free time-slot most days between 11:00 and 12:00 where you want to create a 1 hour session. The easiest way to do this is to create a **day template**:

First enter the times as if you're creating a normal session – then instead of clicking the first submit button, move down slightly on the page to where it says create day template. Enter a name for the template – perhaps the time or something else which will help you remember when it's for, then click the submit button and your day template will be created.

## How to use a day template:

Go to a day with **no** available sessions and then at the bottom of the screen, select your day template from the dropdown box, & click the submit button.

**Please note:** if you already have sessions created on that day they will be deleted (a popup warning will appear on the page alerting you to this), so make sure you select a session free day. If you wish, you can add more sessions to a day where you have already used a template.

Day templates can be deleted, and/or removed from being assigned to a specific day. For example if your typical days change and you have created new day templates, you can use the delete function as general house-keeping.

When a series of days have sessions set for them, they can be grouped as a week template (see more about week templates below)., and used to populate available session times for complete weeks at a time.

## The Week template

The week template makes it even easier! Once you have created a day template, simply apply the template to a full week, adding any extra sessions (on any days) you know you will be repeating each week.

Now – go to the top of the screen and click the **Week Template** link in the **Session** dropdown tab. This will take you to a page where you set up and assign templates allowing you to create sessions for an entire week with just a few clicks.

Let's say for the week starting April 1<sup>st</sup> you have assembled a series of day templates or manually created sessions for all the days you will be working that week... you may decide this is your typical week and you would be offering sessions at these times for the next 6 months.

So...

Enter a name for the week template & use the calendar to select the start date (of your already created week – which would be April 1<sup>st</sup> in the example above), & then click Submit.

**Please note:** you cannot use an empty week to create a week template.

Select the template from the dropdown box & use the calendar to select the week you want to assign the template to. Once you click Submit – all the sessions in the week-template will be created for the chosen week.

**VERY IMPORTANT:** Only **session times** are copied when you create day & week templates (for instance if a client has a regular booking each Tuesday, you will still need to assign that session to the client after you have assigned the template). You can individually select other options, such as payment, questionnaire or specific client for each booked session.

Week templates can be deleted at any time, and/or removed from being applied to a week.

## Chat logs, Session requests and Payments

Under the **sessions** tab you can search and view completed **chat logs** (and assign them to clients if you choose), read more about how to manage chat logs further on in this manual.

View **session requests** and manage them by responding directly with the reply button included with each request. You can also delete requests you have dealt with or no longer require to view.

**Payments** – view the status of payments and orders for sessions. The list gives you a quick overview of payment date, client and session time. To view details of any order – click the view icon.

# How to create Questionnaires

To create a new questionnaire – click the Questionnaire tab in the top menu bar

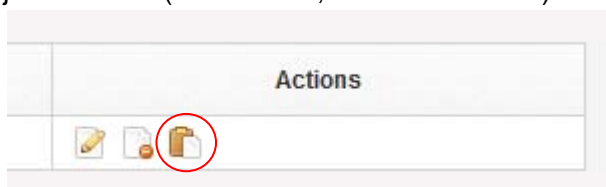
A client questionnaire can be a useful tool in gathering relevant information about a client prior to engaging in an online chat session – Background information, what the client is seeking help for, previous therapy experience and so on.

The top of the list will contain a list of all questionnaires you have created, but as you most likely haven't created any yet the list will be empty, so we'll move straight to the section below:

## Create a new questionnaire:

When you create a questionnaire, your first step is to give it a **name** - this creates the framework for the new questionnaire, and once you have several questionnaires the name will make it easier to locate the one you require.

1. **Add questionnaire** - enter a name for your questionnaire in the field provided, then click the submit button to save it. Your new questionnaire will now show in the list.
2. Once you have created the questionnaire it will show on your therapist questionnaire page - and you can now move on to adding the questions.
3. Click the **Edit Questions** icon in the Actions column next to the questionnaire you just created (the 3<sup>rd</sup> icon, as circled below):



4. **On the Edit Questions page**, you can edit previously created questions – and you can add as many new questions you require, by clicking the **Add Question button**:  
Type the question in the Body field  
Select from the dropdown what type of question it is (text, multiple choice or yes/no),  
Select the display order (1 = first question)  
Tick if the question is required (client cannot skip the question).  
Click the **submit** button to save.

To **add more questions** - repeat the steps above as many times as you need.

**Please note** - you cannot modify an active questionnaire if a client has completed it.

5. If you need to **change the name** of any **questionnaire** – click the **Edit** icon in the Actions column next to the questionnaire you wish to change. This will only allow you to edit the NAME of the questionnaire (not the questions).

# How to use the Chat interface

When a chat session is about to start, a popup window will show on your screen with a link to enter the chat room. Click the Chat button to join the session.

## Typing and sending messages:

The typing area sits just below the chat window. Simply place your cursor in the typing area and type your first comment. You can type longer messages than fit in the typing area – the text will move along like a ticker-tape allowing you to see the last words you have typed. You can also click the available emoticons (cartoon faces) to insert them in your message.

To send a message: either click the **send** button or hit the **enter** key on your keyboard.

## Reading messages:

Once your comment is sent your therapist will be able to read it in their identical chat window. The chat window uses a different colour for therapist and client comments (green and black), which makes it easy to see who has written what. Any **system messages** are clearly visible in bold red.

When the chat window fills up with comments a **scrollbar** will appear, if you need to see earlier comments – simply scroll up the page.

## Additional features and functions:

The chat window is very easy to use; it is designed with security and user-friendliness in mind. Simply type your comments, read responses and type more comments. Both client and therapist have a 'count-down' clock at the bottom of the page, which lets both parties know how much time remains in the session.

If you need to take a break, don't worry – the session will remain active for the duration of the booked session. You can go away and come back, without losing the session.

Therapists also have the option to **extend** the session. When a session is a few minutes from ending, a notification will appear at the bottom of the page allowing the therapist to extend the session by 5 minutes, 10 minutes or 15 minutes. If you don't want to extend – simply ignore and the session will end when time is up.

**Once the session time is up – the session will end automatically.**

# How to view Chat logs

Once a session is completed a chat log is automatically saved to the system. You can retrieve any log by clicking the **Chat Logs** link under the **Sessions** tab.

1. To view any chat log – click the details link next to the log you require.
2. The session chat log contains information about time, date and client.
3. The chat log also includes answers from a questionnaire if one was completed prior to the session.
4. The chat history (all comments written during the session) is included in the session log.
5. If you want to use the built-in search function (search chat logs) enter keywords (words you would use to search for this chat log) in the box provided.
6. Once you enter keywords, they get attached to the chat log and entered into the database. Next time you want to view this chat log: click the **Search Chat Logs** link (directly below the **Chat Logs** link under the **Sessions** tab).
7. Enter the keywords you put in earlier to bring up the chat log.
8. You can make a chat log available to the client – if you wish the client to be able to view the log, tick the box on the chat log details page.
9. View order and payment information at the bottom of the log.
10. If you have made changes (such as allowing client to view the chat log) make sure you save by clicking the submit button at the bottom of the page.

## More information

By now we've covered most of the things you need to know in order to set up your online e-therapy system. This last section in the user guide covers a few general points:

1. Make sure you always **Logout** from the system before leaving your computer
2. When in an active chat session, ensure you have privacy where no one else can view your screen (this is particularly important for client/therapist confidentiality)

purposes).

3. To find out when your e-therapy plan subscription expires – go to your **Profile** page. There is a notice at the top of the page with the subscription end date. You can renew your subscription via the link next to the notice on your profile page, or use the **Renew** link in the **Profile** dropdown tab.
4. Make sure you direct your clients to your sub-domain & inform them that they need to register in order to book an online session with you (or for you to be able to assign a free session to them)
5. Don't feel daunted by the large amount of information in this guide – we have likely covered more than you need. Once you have hands-on experience you will see how easy it is to create sessions, use the chat interface & keep your profile up-to-date.
6. For general information you may find useful hints in the **FAQs** section
7. If you need to contact e-therapy admin, simply fill out the form on the **Contact** page
8. Above all, we believe you will find great satisfaction in using a system designed with security and user-friendliness in mind, while at the same time providing flexibility through removing restrictions imposed by travel & time 😊
9. **Extra note on payment gateways:** There are two payment gateways to select from; Paymate and Paypal. These are used by the e-therapy system to securely receive payments for both therapist registrations and online chat sessions (when a therapist selects to receive online payments). If you already have an account with one of the payment gateways select that gateway. You will need an account with either Paymate or Paypal to receive online payments for sessions. You can view their terms and policies online at:

**Paymate** - <http://www.paymate.com/cms/>

**Paypal** - <http://www.paypal.com.au/au>