

SI TRAINING RESOURCES

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GUIDE - ASSIGNING LEGAL INTERPRETING ORDERS

1. Go to Order Control Center

Once an assignment is broadcast, move on to the Control Center of the order.

The screenshot displays a scheduling interface for legal interpreting orders. At the top, navigation tabs include 'Today', 'Schedule interpreter', 'Find assignment', 'Journal report', 'ISO report', 'siConnector schedule', 'Glance', 'Time off', and 'Find vendor'. Below these, a 'Scheduling tools' section shows a calendar for September 2022 with the 27th selected. A summary bar indicates: 1 TOTAL, 1 OPEN, 0 READY TO ASSIGN, 0 NO INTERPRETER, 0 REQUIRES APPROVAL, and 0 CANCELLED. A pop-up window shows details for order 100181 ARMENIAN, scheduled for 8:15 am / 3:00, with the location 11400 West Olympic Boulevard, 2nd Floor, Los Angeles, CA 90064, and the status NOT ASSIGNED. A toolbar at the bottom contains icons for 'Request details', 'Edit', 'Reschedule', 'Clone request', 'Cancel', 'Journal', 'Assign interpreter', 'No Vendor', 'Additional documents', 'Compliance report', 'Appointment report', 'ISO Reporting', and 'Control center'. The 'Control center' icon is highlighted with an orange box.

Tip: Another way to get to the Control Center is to click Assign Interpreter.

SCHEDULE ACCOUNTING TOOLS AND SETTINGS a LOG OUT

Today Schedule interpreter Find assignment Journal report ISO report siConnector schedule Glance Time off Find vendor

Scheduling tools

< September 2022 > 27 SEP 2022 1 TOTAL 1 OPEN 0 READY TO ASSIGN 0 NO INTERPRETER 0 REQUIRES APPROVAL 0 CANCELLED Table view Filters are OFF

Su Mo Tu We Th Fr Sa

1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30

Total assignments: 9

October 2022

Su Mo Tu We Th Fr Sa

1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 31

Total assignments: 0

Open: 1
No broadcast: 1

Month Year
January

SHOW CALENDAR

6:00 am
7:00 am
8:00 am
9:00 am
10:00 am
11:00 am
12:00 pm
1:00 pm

100181 ARMENIAN 6:15 am / 3:00

AAA / Metro Litigation Los Angeles :: AAA / Metro Litigation Los Angeles Northern CA Rates
11400 West Olympic Boulevard, 2nd Floor Los Angeles, CA 90064
NOT ASSIGNED

Request details Edit Reschedule Clone request Cancel Journal Assign Interpreter No Vendor Additional documents Compliance report Appointment report ISO Reporting Control center

- DETAILS

- You will be the details tab open up. Review it before moving on to the next step.

← CONTROL CENTER :: ASSIGNMENT #100181

DETAILS ASSIGN INTERPRETER RESCHEDULE BROADCAST

MODALITY OSI

SERVICE Afrikaans

DATE AND TIME September 27, 2022 at 6:15 AM (Pacific Time Zone) Estimated end time 9:15 AM (3:00)

CUSTOMER AAA / Metro Litigation Los Angeles :: AAA / Metro Litigation Los Angeles Northern CA Rates

LOCATION 11400 West Olympic Boulevard, 2nd Floor, Los Angeles, CA 90064

DESCRIPTION Test

REQUESTER James Haderlein

SCHEDULED September 27, 2022 at 12:08 PM by Gabriela Garcia (Ms.)
800.201.7121 GabrielaG@cis-inc.com

VENDOR GENDER Neutral

ACCOUNT NOTES

SERVICE ACCOUNT NOTES

BILL TO ACCOUNT NOTES

Q-TAGS ADMINISTRATIVE CERTIFIED

CANCEL ASSIGNMENT JOURNAL RESET COORDINATES

2. Choose an Interpreter from Available Tab

Click the Available tab.

- **AVAILABLE**

- This shows you the interpreters that are available, meet the criteria, and who responded to the broadcast that went out notifying them of the available assignment (i.e. Assignment Offer email).

** Important ** Be sure to check the profit margins to choose the best interpreter option. Profit margins should be above 40% and typically, the higher the better, while not compromising quality. In essence, it is better to choose someone who can provide a quality service (and has a good internal rating) than someone with a low rating even if the profit margin may be higher.

CA	Avetisyan, Magdalina	\$166.67	46%
CA	Basmadjian, Vartouhi	\$125.00	60%
CA	Boshyan, Liliya	\$166.67	46%
CA	Darakjian, Maral	\$116.67	62%
CA	Derpetrossian, Alen	\$108.34	65%
CA	Galindo, Test Lourdes	\$150.00	52%
CA	Kassabian, Arpi	\$0.00	100%
CA	Khadjadorian, Marla	\$85.00	72%
CA	Markosian, Tamar	\$183.34	41%
CA	Meekay, Mary	\$150.00	52%

3. Assign Interpreter

Click "ASSIGN" to confirm your interpreter selection.

- **STATUS OF VENDOR**

- Once you assign the interpreter, their name will be grey and there will be a red line on the left.

See the example:

Basmadjian, Vartouhi	\$125.00	60%
----------------------	----------	-----

** Once assigned, the interpreter will receive an assignment confirmation email **

4. Verify via Journal

Review the Journal to confirm that assignment paperwork was sent to interpreter you assigned.

GUIDE - CANCELLING ORDERS (TIMELY CANCELLATION)

* Please note that the following example is for a timely cancellation. For late cancellations, please see document "Guide - Cancellation Options." *

1. Open Calendar

Navigate to Schedule tab and go to the date of the assignment you want to cancel.

Entering & Broadcastin... | Schedi x | S | ScheduleInterpreter and Pronto T x +

secure.scheduleinterpreter.com/cis/cgi-bin/dna.cgi?action=home

Plunet

SCHEDULE ACCOUNTING TOOLS AND SETTINGS LOG OUT

Welcome Ms. Gabriela Garcia • Continental Interpreting

Today Schedule interpreter Find assignment Journal report ISO report siConnector schedule Glance Time off Find vendor

Scheduling tools

< July 2022 > 12 JUL 2022 1 TOTAL 1 OPEN 0 READY TO ASSIGN 0 NO INTERPRETER 0 REQUIRES APPROVAL

100154 GERMAN 12:00 pm / 100

Zero Test
600 Commerce Street, 6th Floor New Tower
Dallas, TX 75202

Record ID: 123456

NOT ASSIGNED

Request details Edit Reschedule Clone request Cancel Journal Assign Interpreter No Vendor Additional documents Compliance report Appointm. report ISO Reporting Control center

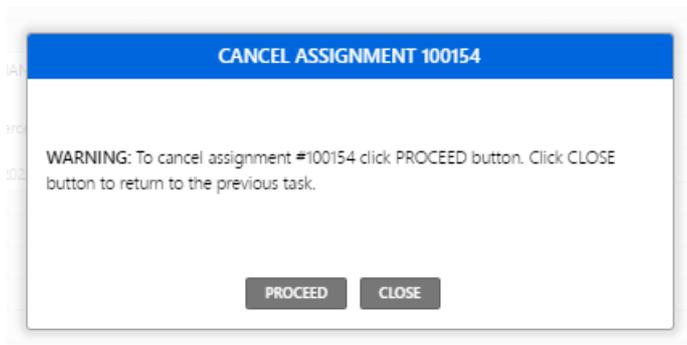
2. Select Cancel

Hover over the assignment you want to cancel. This will open the Order Ribbon with the Cancel shortcut.

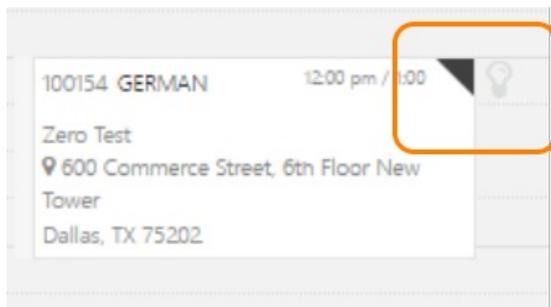
The screenshot shows the Continental Interpreting scheduling software interface. The main area displays a calendar for July 2022, with the 12th of July highlighted. A pop-up window shows details for a 12:00 pm / 1:00 pm assignment titled "100154 GERMAN". The assignment details include "Zero Test", "600 Commerce Street, 6th Floor New Tower, Dallas, TX 75202", and "Record ID: 123456". The status is "NOT ASSIGNED". A toolbar at the bottom of the pop-up window contains several action buttons, with the "Cancel" button highlighted by an orange box. The interface also shows a navigation menu at the top with options like "SCHEDULE", "ACCOUNTING", "TOOLS AND SETTINGS", and "LOG OUT". A status bar at the top right indicates "1 TOTAL" and "1 OPEN" assignments.

3. Confirm Cancellation

Click "proceed" to confirm that you want to cancel the order.



Notice how the assignment corner code color changes to charcoal grey.

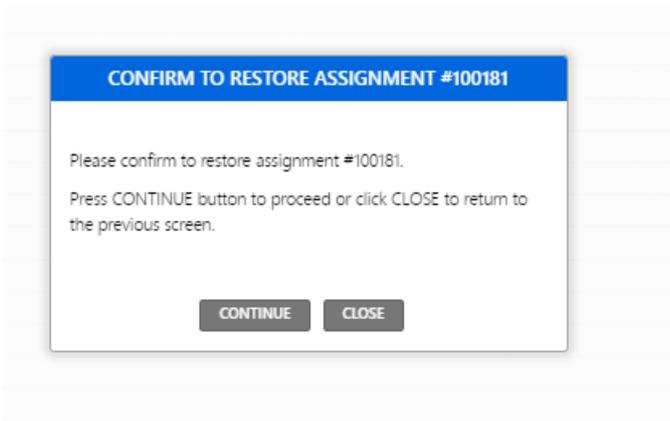


4. Verify via Journal

Once cancellation was submitted, check the Journal to verify that the change was recorded and that the client and vendor received cancellation notification emails.

Bonus Tip

Need to restore the assignment? You can do that by hovering over the assignment and clicking "Restore." You will get the following pop-up. Continue to restore the assignment.



Once restored, you will see the notes on the restored assignment in the Journal Entries.

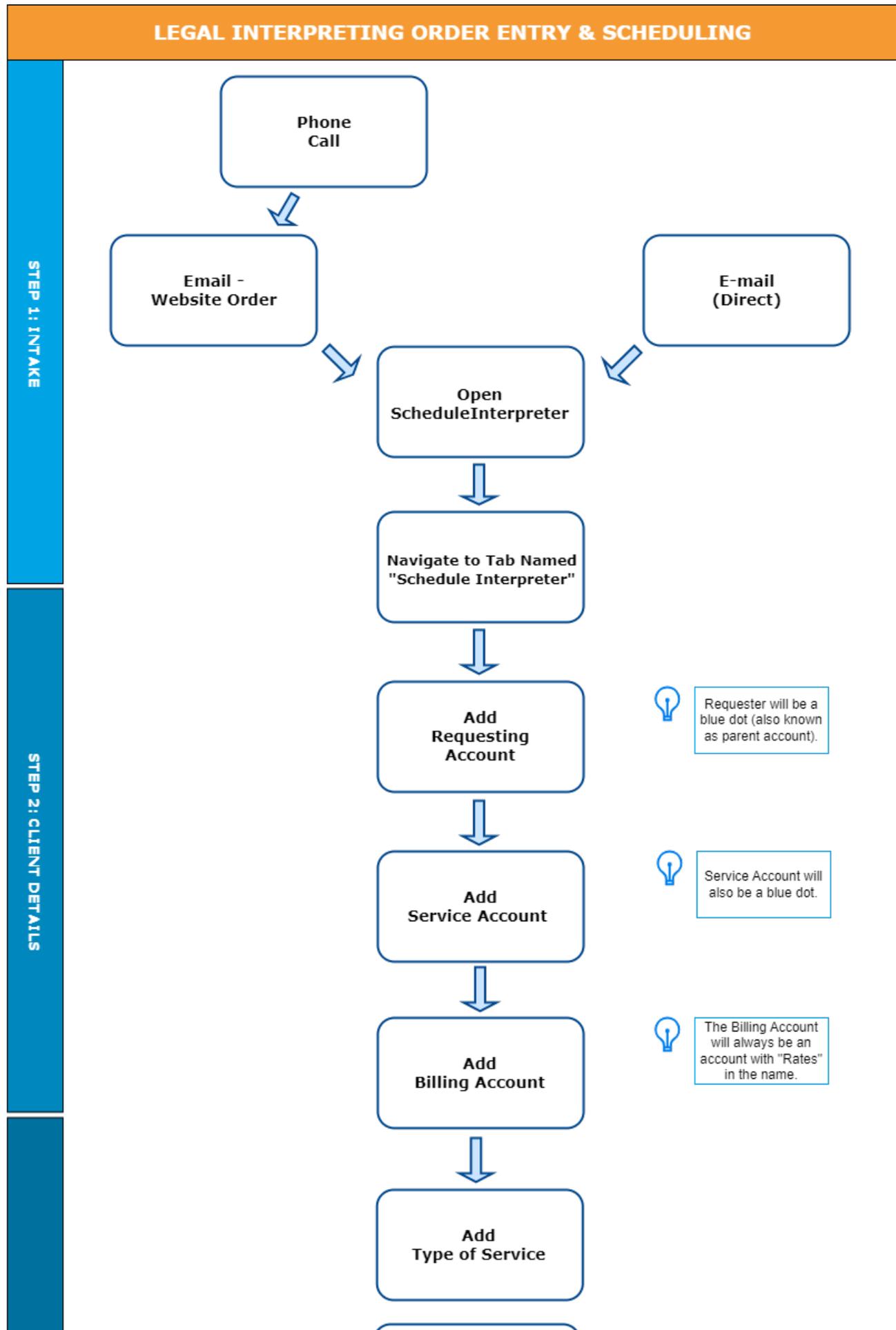
* Please note that you will need to broadcast and assign the interpreter for the order again. *

You can see an example below of an order that was restored. Check the Journal notes as a reference for all touchpoints in the order. You can also reference the Notifications inbox in Outlook as another resource for touchpoints.

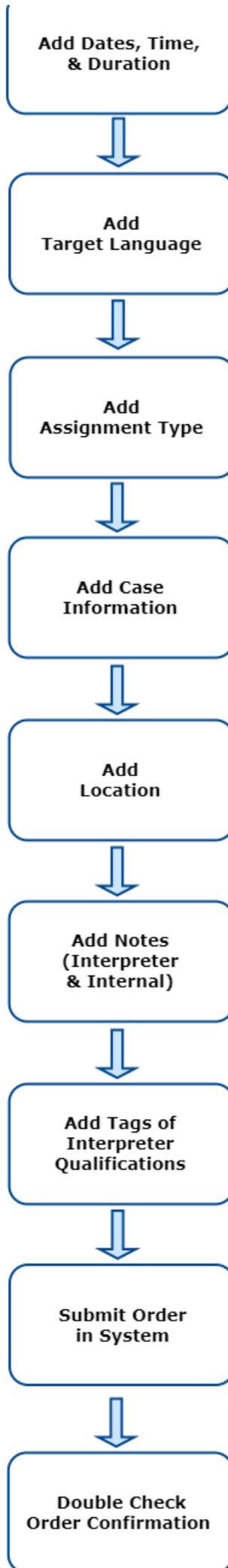
The screenshot shows the "CONTROL CENTER :: ASSIGNMENT #100181" interface. On the left, the "DETAILS" tab is active, showing assignment information such as Modality (OSI), Service (Armenian), Date and Time (September 27, 2022 at 6:15 AM), Customer (AAA / Metro Litigation Los Angeles), Location (11400 West Olympic Boulevard), and Requester (James Haderlein). At the bottom of the details are buttons for "PAPERWORK", "RESEND PAPERWORK", "REMOVE INTERPRETER", "DETAILS", "RESET", "CANCEL ASSIGNMENT", and "JOURNAL".

On the right, the "Journal Entries For Assignment #100181" section displays a list of events. The first entry, highlighted with an orange border, is from "GG Gabriela Garcia Continental Interpreting" at 1:05 pm, with the note "Assignment is restored." Other entries include a "ScheduleInterpreter® Automatic" notification at 12:52 pm ("Cancellation notification is sent to Magdalena Avetisyan."), another "GG Gabriela Garcia Continental Interpreting" entry at 12:51 pm ("Assignment is cancelled using Less than 48 hours Cancellation policy."), a third "GG Gabriela Garcia Continental Interpreting" entry at 12:51 pm ("Assignment is cancelled."), and a final "ScheduleInterpreter® Automatic" notification at 12:48 pm ("Paperwork with details is e-mailed to Magdalena Avetisyan.")

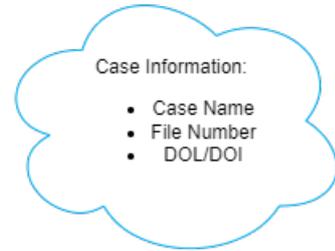
FLOWCHART - LEGAL INTERPRETING ORDER ENTRY & SCHEDULING



STEP 3: ASSIGNMENT DETAILS



Duration will affect billing; Be mindful and careful when entering this.



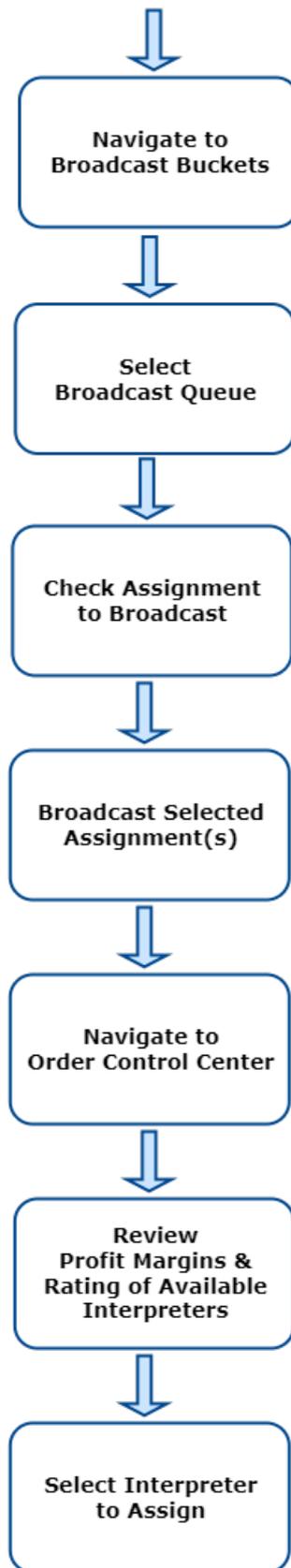
Remote Interpreting (VIS) orders must indicate the Virtual Interpreting Service under Locations.

STEP 4: INTERPRETER QUALIFICATIONS

STEP 5: SUBMIT ORDER

STEP 6: BROADCAST ASSIGNMENT

STEP 7: CHOOSE & ASSIGN INTERPRETER



Check Journal for any important activity or notes, if needed.

GUIDE - RESCHEDULING ORDERS

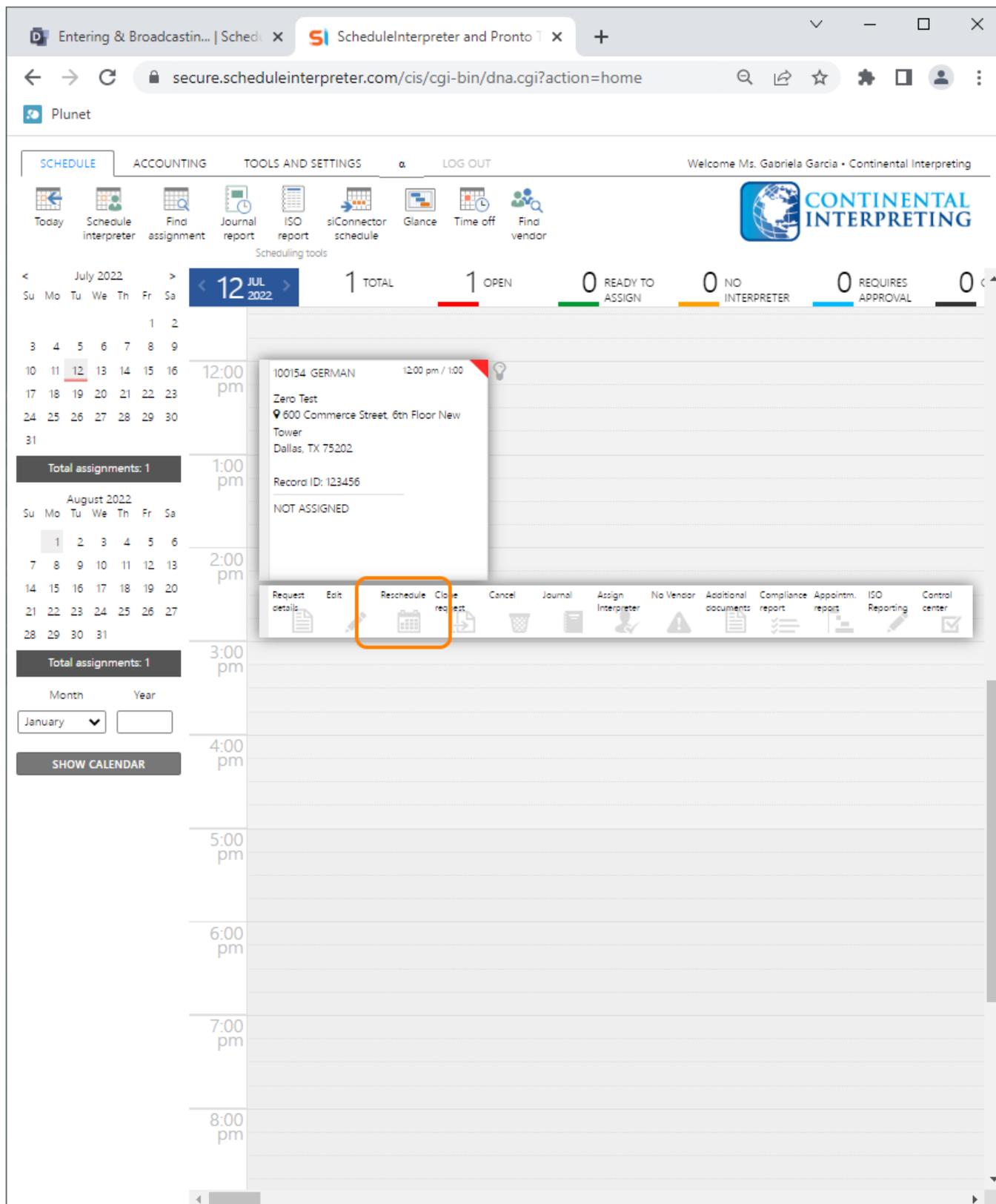
1. Open Calendar

Navigate to Schedule tab and go to the date of the assignment you want to reschedule.

The screenshot displays the 'SCHEDULE' tab in the Continental Interpreting system. The interface includes a navigation bar with 'SCHEDULE', 'ACCOUNTING', 'TOOLS AND SETTINGS', and 'LOG OUT'. A user profile for 'Ms. Gabriela Garcia' is visible. Below the navigation bar are icons for 'Today', 'Schedule interpreter', 'Find assignment', 'Journal report', 'ISO report', 'siConnector schedule', 'Glance', 'Time off', and 'Find vendor'. The main area features a calendar for July 2022, with the 12th highlighted. A summary bar shows '1 TOTAL', '1 OPEN', '0 READY TO ASSIGN', '0 NO INTERPRETER', and '0 REQUIRES APPROVAL'. A pop-up window for the 12:00 pm slot on July 12th contains the following details: '100154 GERMAN', '12:00 pm / 100', 'Zero Test', '600 Commerce Street, 6th Floor New Tower, Dallas, TX 75202', 'Record ID: 123456', and 'NOT ASSIGNED'. A toolbar at the bottom of the pop-up offers actions: 'Request details', 'Edit', 'Reschedule', 'Clone request', 'Cancel', 'Journal', 'Assign Interpreter', 'No Vendor', 'Additional documents', 'Compliance report', 'Appointm. report', 'ISO Reporting', and 'Control center'.

2. Select Reschedule

Hover over the assignment you want to reschedule. The Order Ribbon with shortcuts will then be visible. Select the Reschedule function. This will open the Order Control Center.



The screenshot displays the Continental Interpreting software interface. At the top, there is a navigation bar with tabs for SCHEDULE, ACCOUNTING, TOOLS AND SETTINGS, and LOG OUT. The user is identified as Ms. Gabriela Garcia. Below the navigation bar is a toolbar with various icons for scheduling and reporting. A calendar view shows the current date as July 12, 2022. A summary bar indicates 1 TOTAL assignment, 1 OPEN assignment, 0 READY TO ASSIGN, 0 NO INTERPRETER, and 0 REQUIRES APPROVAL. A pop-up window displays details for assignment 100154 GERMAN, including the location (Zero Test, 600 Commerce Street, 6th Floor New Tower, Dallas, TX 75202) and the record ID (123456). The status is NOT ASSIGNED. A ribbon at the bottom of the pop-up window contains several action buttons, with the 'Reschedule' button highlighted by an orange box. Other buttons include Request details, Edit, Close request, Cancel, Journal, Assign Interpreter, No Vendor, Additional documents, Compliance report, Appointm. report, ISO Reporting, and Control center.

3. Go to Reschedule Tab in Control Center

Click the Reschedule tab.

← CONTROL CENTER :: ASSIGNMENT #100201

DETAILS ASSIGN INTERPRETER **RESCHEDULE** BROADCAST

CURRENT DATE AND TIME December 28, 2022 at 11:00 AM (Pacific Time Zone)
Estimated end time 2:00 PM (3:00)

* NEW DATE Dec ▼ 28 ▼ 2022 📅 ?

* NEW START TIME ▼ ▼ AM PM ?

HOUR MINUTES

RESCHEDULE

4. Enter Reschedule Details

Enter the new date and time information before clicking Reschedule.

← CONTROL CENTER :: ASSIGNMENT #100201

DETAILS ASSIGN INTERPRETER **RESCHEDULE** BROADCAST

CURRENT DATE AND TIME December 28, 2022 at 11:00 AM (Pacific Time Zone)
Estimated end time 2:00 PM (3:00)

* NEW DATE Jan ▼ 24 ▼ 2022 📅 ?

* NEW START TIME 1 ▼ 00 ▼ AM PM ?

HOUR MINUTES

RESCHEDULE

5. Click "Reschedule"

6. Verify via Details & Journal

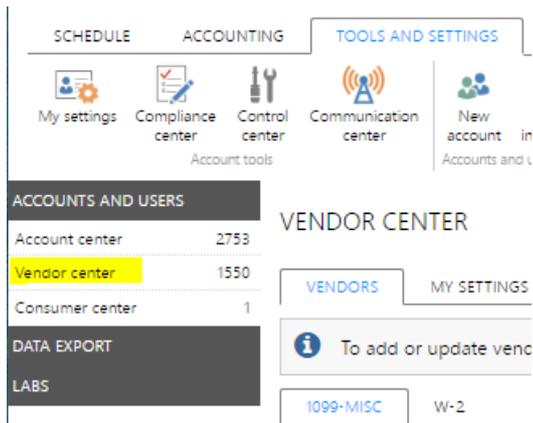
Check the Details tab and Journal to confirm the change was entered properly and that the client and vendor received reschedule notifications.

GUIDE - DISALLOWING INTERPRETERS IN VENDOR CENTER

* The following steps are only available to Admin Users. *

1. Go to Vendor Center

In the Tools and Settings tab, select Vendor Center on the left.



2. Select a Vendor

Click Edit to open the vendor's profile.

LLC, Joye - Signing Resources & Interpreters	10000	Vancouver, WA 98665	877.512.2246 cell	request@signingresources.com	EDIT
Abdallah, Mona Asad	10001	Garden Grove, CA 92841	415.533.9566 cell	monaajobs@yahoo.com	EDIT
Abdelfattah, Nabil	10002	Richmond, CA 94804	510.917.2040 cell	nabil.abdelfattah@sbcglobal.net	EDIT
Abe, Akiko	10003	Sherman Oaks, CA 91403	310.415.8048 cell	amr2@aol.com	EDIT
Abou-Saada, Raji	10004	Fullerton, CA 92832	714.213.1750 cell	rsaada567@yahoo.com	EDIT
Abraha, Senait	10005	Livermore, CA 94551	408.786.4336 cell	venaaron@gmail.com	EDIT
Abraham, Ermias	10006	Las Vegas, NV 89123	702.427.8215 cell	aermias25@yahoo.com	EDIT
Abrajan, Ivonne	10007	Saratoga, CA 95070	408.482.7610 cell	iav@pacbell.net	EDIT
Abri, Arlette	10008	Pasadena, CA 91104	626.616.6542 cell	arletteabri@yahoo.com	EDIT
Abugnerir, Janan	10009	Riverside, CA 92506	951.660.1033 cell	janan1227@yahoo.com	EDIT
Acopian, Galanee	10011	Van Nuys, CA 91401	818.802.2046 cell	armenian911@gmail.com	EDIT

3. Update Exclusion List

In the Exclusion List tab, select Disallow. Then, select those accounts you do want to disable for the vendor. Once saved, this will prevent the vendor from receiving Assignment Offer emails for orders from

the client account checked.

GENERAL PROFILE :: TAX ID :: PASSWORD TIME OFF SmartID™ SKILLS RATES AND INVOICES **EXCLUSION LIST** VENDOR NOTES

i Using checkboxes, select accounts to prevent or allow vendor to provide services to. Use following rules to configure vendor's profile.
Allow - will allow vendor to provide services to selected accounts, vendor will not be able to provide services to any newly added accounts.
Disallow - will prevent vendor to provide services to selected accounts, vendor will be able to provide services to any newly added accounts.

PERMISSION Allow Disallow

SELECT ACCOUNTS

	ACCOUNT	SELECT
1	Corvel Corporation - Concord	<input type="checkbox"/>
2	Karen D. Wood and Associates Attorneys At Law - San Diego	<input type="checkbox"/>
3	Karen D. Wood and Associates Attorneys At Law - Veritext Southern CA Rates	<input type="checkbox"/>
4	A+ Court Reporters Pasadena	<input type="checkbox"/>
5	AAA / Metro Litigation Los Angeles	<input type="checkbox"/>
6	AAA / Metro Litigation Los Angeles Northern CA Rates	<input type="checkbox"/>
7	AAA / Metro Litigation Los Angeles OOS Rates	<input type="checkbox"/>
8	AAA / Metro Litigation Los Angeles Southern CA Rates	<input type="checkbox"/>

4. Save

Finally, click save to update the Account setting in the system.

GUIDE - ADDING JOURNAL NOTES IN CONTROL CENTER

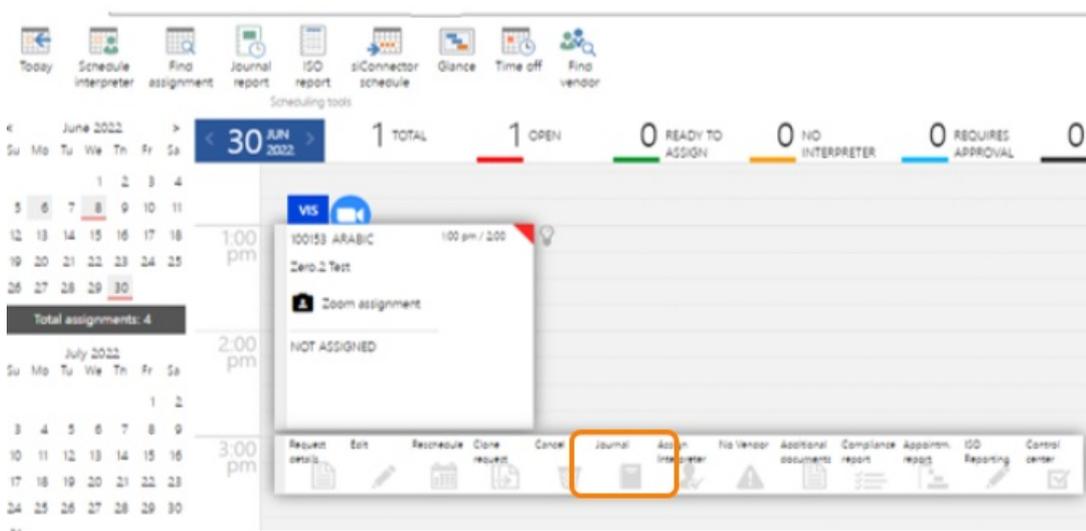
1. Open Calendar & Look for Assignment

Navigate to the assignment to which you wish to add notes.

The screenshot displays the Control Center interface. At the top, there are navigation tabs: SCHEDULE, ACCOUNTING, TOOLS AND SETTINGS, and LOG OUT. Below these are various tool icons: Today, Schedule interpreter, Find assignment, Journal report, ISO report, siConnector schedule, Glance, Time off, and Find vendor. The main area shows a calendar for June 2022, with the 30th highlighted. To the right of the calendar, it indicates '1 TOTAL' and '1 OPEN' assignments. A pop-up window for the assignment '100153 ARABIC' is visible, showing 'Zero.2 Test' and 'Zoom assignment' with a 'Journal' icon. The calendar also shows 'Total assignments: 4' for June and 'Total assignments: 0' for July. At the bottom, there are dropdown menus for 'Month' (set to January) and 'Year', and a 'SHOW CALENDAR' button.

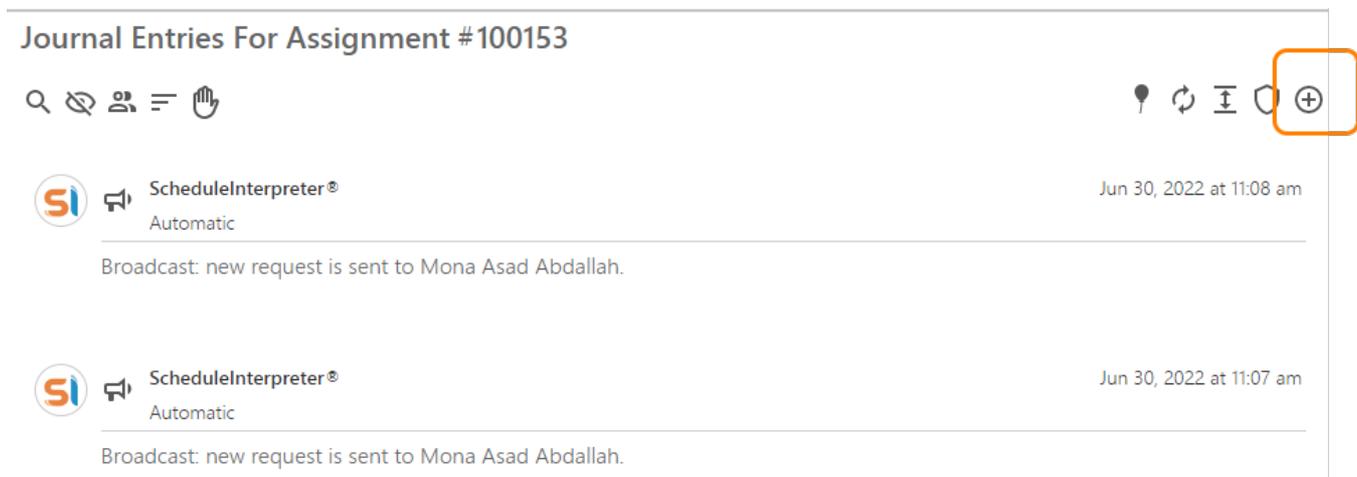
2. Select Journal

Hover over the assignment and select "Journal."



3. Click the + to add a new entry.

When you click the +, you will see a field where you can enter your entry.



4. Select if you want to share the update with vendor, requester, etc.

* Skip this step if not applicable. * This will only apply to users who have portal access. Note that this does not send an automatic notification to whomever you are sharing the note with.

Share with vendor Share with requester Include in invoice Include in reminder

5. Save your Journal Entry

Click "save" to enter the Journal Entry in the system.

SAVE **CANCEL**

You can also easily access the Journal in the assignment Control Center, where you can see all the details related to the order/assignment. Below is an example. Click either the "Journal" button or the + sign to enter notes.

The screenshot displays the 'CONTROL CENTER :: ASSIGNMENT #100153' interface. On the left, the 'DETAILS' tab is active, showing assignment information such as Modality (VIS), Service (Arabic), Date and Time (June 30, 2022 at 1:00 PM), Customer (Zero.2 Test), Bill Rate (\$ 75.00), Conference Platform (Zoom), Location (1901 Avenue of the Stars, Suite 935, Los Angeles, CA 90067), Description (test), Requester (Lourdes Galindo), Scheduled (June 30, 2022 at 10:14 AM by Support Desk), and Vendor Gender (Neutral). At the bottom of this section are buttons for 'CANCEL ASSIGNMENT', 'JOURNAL', and 'RESET COORDINATES', with the 'JOURNAL' button highlighted by an orange box.

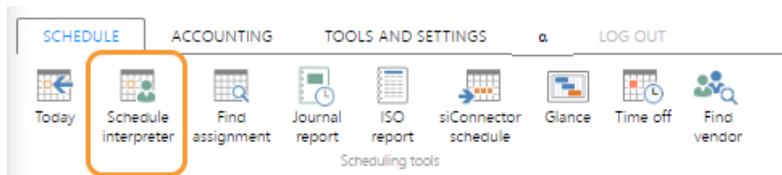
On the right, the 'Journal Entries For Assignment #100153' panel is shown. It features a toolbar with icons for search, refresh, and a plus sign (+) highlighted by an orange box. The journal entries list includes:

- Gabriela Garcia** (Continental Interpreting) - Feb 9, 2023 at 2:46 pm: test journal entry
- ScheduleInterpreter®** (Automatic) - Jun 30, 2022 at 11:08 am: Broadcast: new request is sent to Mona Asad Abdallah.
- ScheduleInterpreter®** (Automatic) - Jun 30, 2022 at 11:07 am: Broadcast: new request is sent to Mona Asad Abdallah.
- ScheduleInterpreter®** (Automatic) - Jun 30, 2022 at 11:06 am: Broadcast (custom) is sent to Mona Asad Abdallah.

GUIDE - ENTERING LEGAL INTERPRETING ORDERS

1. Open the Order Intake Form with "Schedule Interpreter"

Under the Schedule tab, you will see Scheduling Tab Menu. Select "Schedule Interpreter" to get started on an order.



2. Client Details

Move on to the Request Details tab. Fill out the client information.

• REQUESTER

- Who is the Requester? The Requester is the main account that placed the order. This could be any of the following: court reporting company, law firm, school district, etc.

In the text box you can key in the name (you may key in a portion of the account name).

* REQUESTER ?

* REQUESTER NAME ▼

?

If the client does not auto-populate within this tab go to the LOOKUP tab to search by additional criteria. Follow the instructions below to add a new requester for an account.

- Need to add a new Requester? If the contact who placed the request is not listed Accounts click the "ADD REQUESTER" button. Key in the following details then click "ADD AND SELECT."

• SERVICE ACCOUNT

- What is the Service Account? The Service Account is the one that will receive the service; the end client, usually the law firm. If the law firm sent a request, the service account is the law firm. Under Service Account, you will indicate the name of the handling attorney.

In the text box, type the name of the law firm and/or the handling attorney's name.

*** Important *** It is necessary to select a parent account (blue dot) at this point.

Service Accounts always have a blue dot and must be selected here for the order to be entered properly.

• BILLING ACCOUNT

- What is the Billing Account? This is the account that will receive the invoice for our services.
- Select the "BILLING ACCOUNT" box whether billing a insurance company or the law firm directly. Once that box is selected the a drop down menu for the Bill To Account will appear.
- When we need to bill a third party, such as an insurance company, the billing account is the insurance company. If we are not billing a third party (i.e. insurance company), you will use the law firm's subaccount (i.e. Law Firm - Southern CA Rates).
- **You must choose an account with Rates for their rates to be entered for invoicing.**

In the text box you can key in the Insurance Company name. Can't find an adjusters or billing contact name?

Use the LOOKUP tab to search for an adjuster.

*** Important *** It is necessary to select the correct subaccount under the parent account. Below you will see the parent account (blue dot) and the subaccount that shows the rates that are to be billed (grey dot).

Billing Accounts always have a grey dot and must be selected for the correct rates to pull up at the time of invoices.

3. Assignment Details

Fill out the order information.

- TYPE OF SERVICE (ON-SITE OR REMOTE)

- Select the button that indicates what the client requested.

For on-site interpreting, use OSI, which stands for On-site Interpreting.

TYPE OF SERVICE OSI VIS ?

For remote interpreting use VIS, which stands for Virtual Interpreting Service.

TYPE OF SERVICE OSI VIS ?

Please note: later in the order form, you will need to select the conference platform if the order is for a remote interpreting assignment.

- ASSIGNMENT DATE

- Use the dropdown or the calendar to select the date of service.

ASSIGNMENT DATE Jul 14 2022

- START TIME

- Use the dropdown or key in the start time.
- Select the button for AM or PM.

START TIME 2 00 AM PM

- ESTIMATED LENGTH

- Use the dropdown or key in the start time.

* Important * Be mindful of the duration while maintaining half day and full day hours. You will need to pay close attention to the assignment type when properly entering the duration.

- LANGUAGE

- Keep English as the source and enter the language requested as the target language.

LANGUAGES: English

ASSIGNMENT TYPE: []

CONFERENCE PLATFORM: []

INTERPRETER GENDER: Female

CASE NAME: []

CASE TYPE: []

LEP NAME: [] (FIRST NAME)

CASE NUMBER: []

FILE NUMBER: []

Language List: Afghani, Afrikaans, Albanian, American Sign Language, Amharic, Arabic, Aramaic, Armenian, Assyrian, Azerbaijani, Bajo, Bangladesh, Bantigos, Belarusian, Bengali, Bosnian, Bulgarian, Burmese, Cambodian

- ASSIGNMENT TYPE

- Format of selection will be Calendar Type+ Assignment (example: Spanish Legal:: Deposition).

- CASE NAME

- Fill in Case Name by only capitalizing the proper names (example: Smith vs. Starbucks).

- LEP NAME, CASE NUMBER, FILE NUMBER, DATE OF LOSS/INJURY

- Fill these in as needed.

- LOCATIONS

- Use the dropdown or key in a portion of the address.

*** Important * Remote Interpreting (VIS) orders must indicate the Virtual Interpreting Service under Locations.**



- NOTES FOR INTERPRETER

- Include important or additional notes for the interpreter.

- INTERNAL ORDER NOTES

- Add any notes you want to be visible for staff.

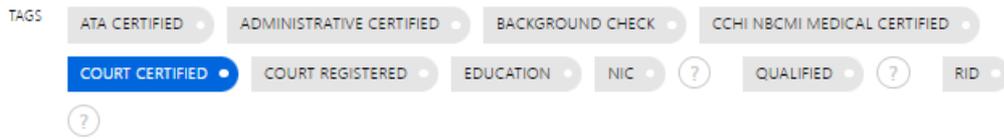
4. Interpreter Qualifications

Fill out interpreter requirements.

- SELECT TAGS

- Click any tags to tell ScheduleInterpreter what type of interpreter the assignment needs. When a tag is

selected, it will turn blue.



5. Submit

Click submit to complete order entry.

You will see the order confirmation afterwards. See example below.

When you see this screen, it means that the Client Confirmation email has been sent to the client who placed the order (Requester).

Next we will move on to broadcasting and then, assigning the order.

< August 2022 >

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Total assignments: 2

September 2022

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Total assignments: 0

Open: 2

No broadcast: 2

Month Year

January

SHOW CALENDAR

<h1>CIS No.: 100156</h1>	
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REQUESTER DETAILS

Name:	Renan Alvarado	Phone Number:	
Company:	AAA / Metro Litigation Los Angeles	Email Address:	

ATTORNEY DETAILS

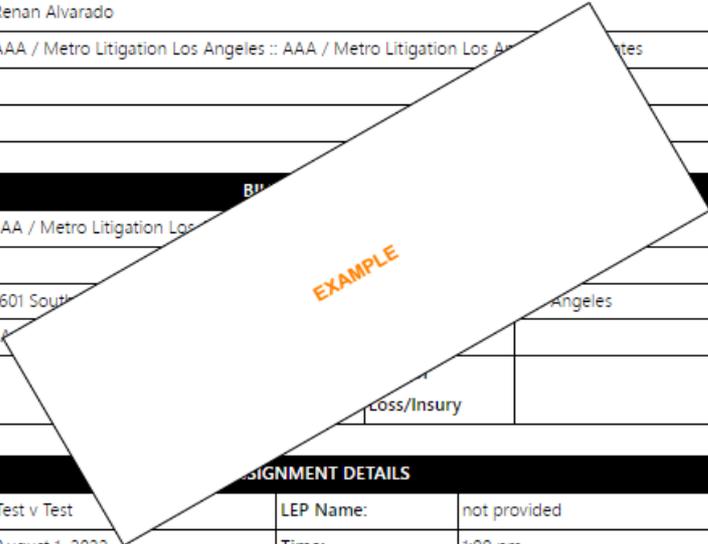
Handling Attorney:	Renan Alvarado		
Law Firm:	AAA / Metro Litigation Los Angeles :: AAA / Metro Litigation Los Angeles		
Phone Number:			
Email Address:			

CLIENT DETAILS

Client:	AAA / Metro Litigation Los Angeles		
Adjuster:			
Address:	2601 South Main Street Los Angeles		
State, Zip Code:	CA 90007		
Claim/Policy Number:			

ASSIGNMENT DETAILS

Case Name:	Test v Test	LEP Name:	not provided
Date:	August 1, 2022	Time:	1:00 pm
Duration:	4:00	Type of Assignment:	Exotic Legal and Medical :: Mediation
Language:	Afghani		
Case type:			
Location Name:	JOHN PRICE LAW FIRM LLC		
Location Address:	3045 Ashley Phosphate Road, North Charleston, SC 29418		
Assignment Notes:			



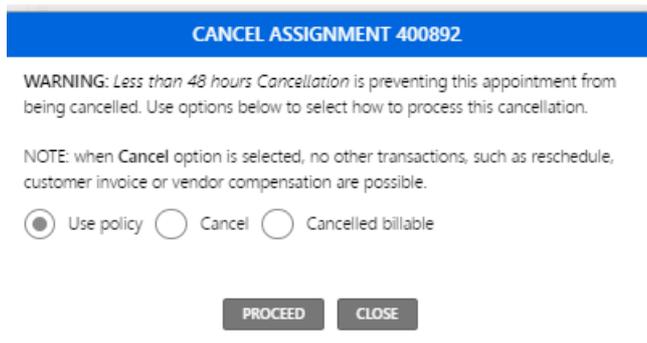
GUIDE - CANCELLATION OPTIONS

1. Go to Order You Want to Cancel

Once you click "Cancel" you will get the following options: Use Policy, Cancel, and Cancelled billable.

If you do not see the three options, the Account settings may need to be updated in Account Center.

* Do not use the following Policy option until you have received the greenlight. For now, disregard this option. *



CANCEL ASSIGNMENT 400892

WARNING: Less than 48 hours Cancellation is preventing this appointment from being cancelled. Use options below to select how to process this cancellation.

NOTE: when Cancel option is selected, no other transactions, such as reschedule, customer invoice or vendor compensation are possible.

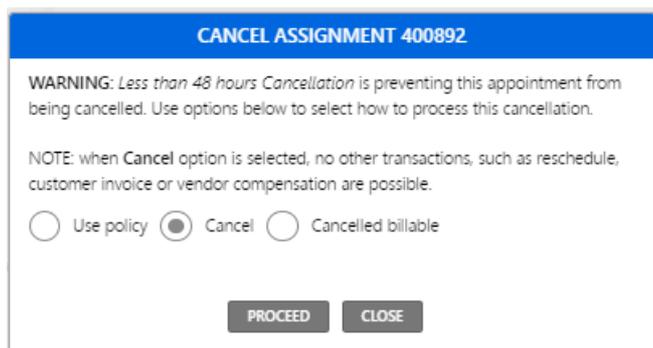
Use policy Cancel Cancelled billable

PROCEED **CLOSE**

2. Select an Option from "Cancel" or "Cancelled billable"

Select Cancel for a Timely Cancellation.

This will cancel the order/assignment and will not transfer any of the order information over to the Accounting Review Center, meaning Accounting will not be able to bill the timely cancellation.



CANCEL ASSIGNMENT 400892

WARNING: Less than 48 hours Cancellation is preventing this appointment from being cancelled. Use options below to select how to process this cancellation.

NOTE: when Cancel option is selected, no other transactions, such as reschedule, customer invoice or vendor compensation are possible.

Use policy Cancel Cancelled billable

PROCEED **CLOSE**

Select "Cancelled billable" for Late Cancellations where we will bill the client.

The interpreter can bill and the client will receive an invoice.

CANCEL ASSIGNMENT 400892

WARNING: *Less than 48 hours Cancellation is preventing this appointment from being cancelled. Use options below to select how to process this cancellation.*

NOTE: when **Cancel** option is selected, no other transactions, such as reschedule, customer invoice or vendor compensation are possible.

Use policy Cancel Cancelled billable

No compensation No invoice

PROCEED **CLOSE**

Select "Cancelled billable" and "No compensation" for Late Cancellations where we will not pay the vendor (interpreter).

If the interpreter informs you that they will not bill for the late cancellation of an assignment, the "No compensation" selection will tell the system to not expect an invoice for the interpreter's services.

CANCEL ASSIGNMENT 400892

WARNING: *Less than 48 hours Cancellation is preventing this appointment from being cancelled. Use options below to select how to process this cancellation.*

NOTE: when **Cancel** option is selected, no other transactions, such as reschedule, customer invoice or vendor compensation are possible.

Use policy Cancel Cancelled billable

No compensation No invoice

PROCEED **CLOSE**

Select "Cancelled billable" and "No invoice" for Late cancellations where we will not invoice the client (i.e. Non-billables).

Some clients have policies that do not allow us to bill them for Late Cancellations. When the cancellation is a Late Cancellation, we are expected to pay the vendor (interpreter), but we cannot invoice the client. In this case, you will need to select the following. This scenario where we lose money because of the above combination is also known as a "Non-billable."

CANCEL ASSIGNMENT 400892

WARNING: *Less than 48 hours Cancellation is preventing this appointment from being cancelled. Use options below to select how to process this cancellation.*

NOTE: when **Cancel** option is selected, no other transactions, such as reschedule, customer invoice or vendor compensation are possible.

Use policy Cancel Cancelled billable

No compensation No invoice

PROCEED **CLOSE**

3. Click "Proceed" to Record Your Cancellation

4. Verify via Journal

Once cancellation was submitted, check the Journal to verify that the change was recorded.

GUIDE - REMOVING AN INTERPRETER FROM AN ASSIGNMENT

1. Go to Order Control Center

Go to the Control Center of the order.

The screenshot shows a scheduling software interface. At the top, there are navigation tabs: Today, Schedule Interpreter, Find assignment, Journal report, ISO report, siConnector schedule, Glance, Time off, and Find vendor. Below these are scheduling tools and a summary bar showing 1 TOTAL, 1 OPEN, 0 READY TO ASSIGN, 0 NO INTERPRETER, 0 REQUIRES APPROVAL, and 0 CANCELLED. A calendar on the left shows the current date as September 27, 2022. A list of assignments is displayed on the right, with a pop-up window open for an assignment on 6:15 am / 3:00. The pop-up window contains the following information: 100181 ARMENIAN, 6:15 am / 3:00, AAA / Metro Litigation Los Angeles :: AAA / Metro Litigation Los Angeles Northern CA Rates, 11400 West Olympic Boulevard, 2nd Floor, Los Angeles, CA 90064, and NOT ASSIGNED. At the bottom of the pop-up window, there is a toolbar with various actions: Request details, Edit, Reschedule, Clone request, Cancel, Journal, Assign Interpreter, No Vendor, Additional documents, Compliance report, Appointment report, ISO Reporting, and Control center. The Control center button is highlighted with an orange box.

2. Select "Remove Interpreter" in Details tab.

DETAILS ASSIGN INTERPRETER AVETISYAN, MAGDALINA RESCHEDULE BROADCAST

MODALITY OSI

SERVICE Armenian

DATE AND TIME September 27, 2022 at 6:15 AM (Pacific Time Zone) Estimated end time 9:15 AM (3:00)

CUSTOMER AAA / Metro Litigation Los Angeles :: AAA / Metro Litigation Los Angeles Northern CA Rates

LOCATION 11400 West Olympic Boulevard, 2nd Floor, Los Angeles, CA 90064

DESCRIPTION Test

REQUESTER James Haderlein

SCHEDULED September 27, 2022 at 12:08 PM by Gabriela Garcia (Ms.)
 ☎ 800.201.7121 ✉ GabrielaG@cis-inc.com

VENDOR GENDER Neutral

ACCOUNT NOTES

SERVICE ACCOUNT NOTES

BILL TO ACCOUNT NOTES

INTERPRETER Avetisyan, Magdalena
 ☎ 818.256.6142 ✉ magdalena@sbcglobal.net

Q-TAGS ADMINISTRATIVE CERTIFIED

PAPERWORK RESEND PAPERWORK REMOVE INTERPRETER

DETAILS RESET CANCEL ASSIGNMENT JOURNAL

- REMOVE VENDOR POP-UP

The following pop-up will appear. Click "Remove Only" if you would like the interpreter to remain available. If you would like the system to know that the interpreter is Not available, select "Remove and Change Status."

Once you remove the interpreter, you can reassign to anyone from the Available tab again.

REMOVE VENDOR

To remove vendor without changing the status click REMOVE ONLY button.
 To remove vendor and change the status to **Not available** click REMOVE AND CHANGE STATUS button or click CLOSE button to return to your previous task.

NOTE: change of status only affects assingment(s) with vendor status listed as AVAILABLE.

REMOVE ONLY REMOVE AND CHANGE STATUS CLOSE

* Note that the interpreter you initially removed will not receive a notification that they have been removed. You will need to confirm with them manually by email that they have been removed. *

3. Verify via Journal

Once interpreter has been removed, check the Journal to verify that

the change was recorded.

4. Proceed to Assigning Replacement

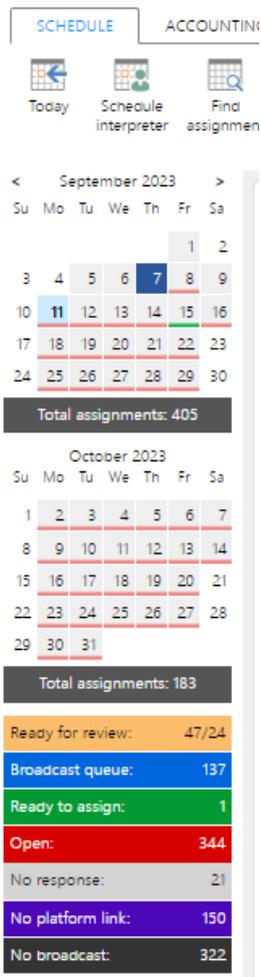
Your assignment is open (not assigned) again.

You may need to rebroadcast the assignment to send out Assignment Offer emails to interpreters who qualify for the assignment. You will then proceed to cover the assignment as usual.

GUIDE - BROADCASTING LEGAL INTERPRETING ORDERS

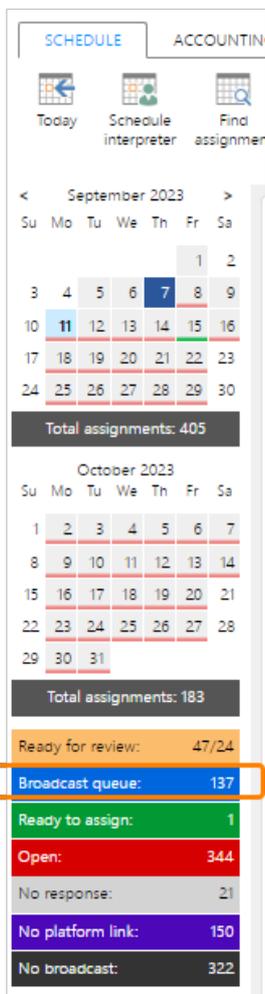
1. Navigate to Broadcast Buckets (Sidebar)

Go to the Sidebar on the bottom left of the screen in your Dashboard View.



2. Select Broadcast Queue Bucket

This is where you will usually go to broadcast your orders and send out Assignment Offers.



3. Review the Queue

Look for your orders that need to be broadcast in the queue.

4. Select and Broadcast

Select the Order you want to broadcast, meaning you want to send a notification that the assignment is available.

BROADCAST QUEUE

	ID	Modality
<input type="checkbox"/>	401828	OSI
<input checked="" type="checkbox"/>	400717	VIS
<input type="checkbox"/>	400481	OSI
<input type="checkbox"/>	401816	OSI
<input type="checkbox"/>	400667	VIS
<input type="checkbox"/>	401334	VIS
<input type="checkbox"/>	401625	VIS
<input type="checkbox"/>	401142	OSI
<input type="checkbox"/>	401347	VIS
<input type="checkbox"/>	401656	OSI
<input type="checkbox"/>	400211	VIS
<input type="checkbox"/>	401796	VIS
<input type="checkbox"/>	401713	VIS
<input type="checkbox"/>	400671	VIS
<input type="checkbox"/>	400138	VIS
<input type="checkbox"/>	400702	VIS
<input type="checkbox"/>	400356	VIS
<input type="checkbox"/>	400736	VIS
<input type="checkbox"/>	400582	VIS
<input type="checkbox"/>	401194	VIS
<input type="checkbox"/>	401787	VIS
<input type="checkbox"/>	401817	OSI
<input type="checkbox"/>	400674	VIS

SAVE

CANCEL

5. Broadcast Selected

On the lower right corner of the Broadcast Queue, select "Broadcast Selected."

This will broadcast the order and an Assignment Offer email will be sent to the interpreters who qualify for the assignment.

SELECT ALL

CLEAR ALL

REMOVE SELECTED

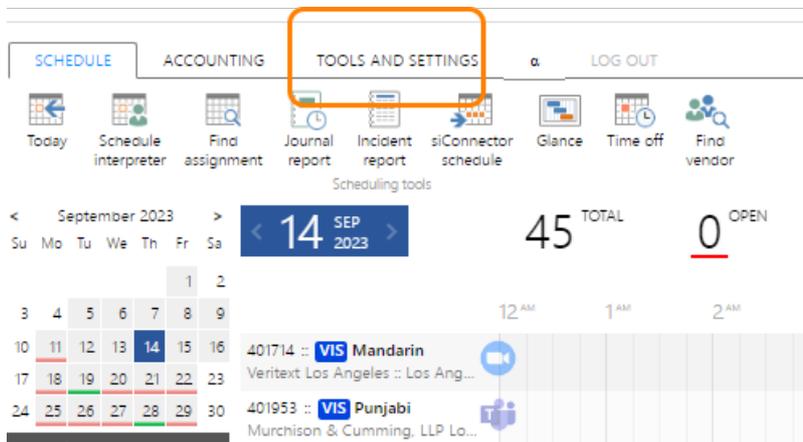
BROADCAST SELECTED

GUIDE - CREATING PARENT ACCOUNTS

* The following steps are only available to Admin Users. *

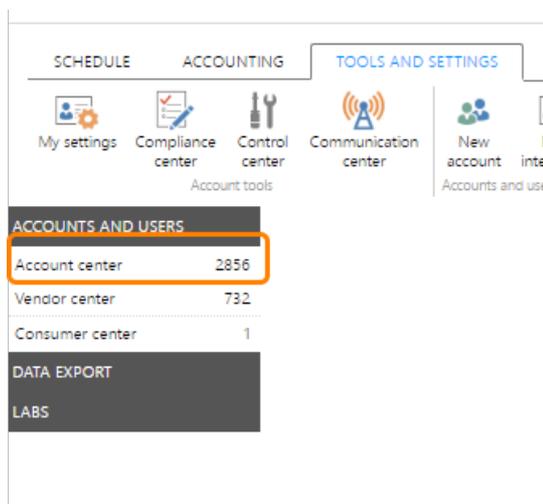
1. Go to Tools and Setting Tab

Navigate to the top menu in ScheduleIntepreter.



2. Navigate to Account Center

View the sidebar menu under Accounts and Users.



- [QUALITY CONTROL CHECK](#)

Key in the name of the account you will be adding before adding the account. This is to double check that the account is not already in our system and will prevent any duplicates. If nothing comes up, proceed to the next step.

ACCOUNT CENTER

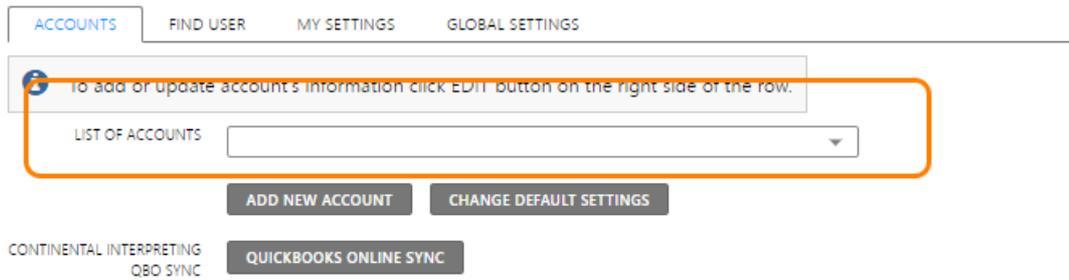
ACCOUNTS FIND USER MY SETTINGS GLOBAL SETTINGS

To add or update account's information click EDIT button on the right side of the row.

LIST OF ACCOUNTS

ADD NEW ACCOUNT CHANGE DEFAULT SETTINGS

CONTINENTAL INTERPRETING QBO SYNC QUICKBOOKS ONLINE SYNC

A screenshot of the 'ACCOUNT CENTER' interface. At the top, there are navigation tabs: 'ACCOUNTS' (selected), 'FIND USER', 'MY SETTINGS', and 'GLOBAL SETTINGS'. Below the tabs is a horizontal line. Underneath the line is a grey box with an information icon and the text: 'To add or update account's information click EDIT button on the right side of the row.' Below this is a 'LIST OF ACCOUNTS' dropdown menu. Underneath the dropdown are two buttons: 'ADD NEW ACCOUNT' and 'CHANGE DEFAULT SETTINGS'. At the bottom of the interface, there are two more buttons: 'CONTINENTAL INTERPRETING QBO SYNC' and 'QUICKBOOKS ONLINE SYNC'. A red rectangular box highlights the 'ADD NEW ACCOUNT' button.

3. Select Add New Account

* Tip: Gather all account information ahead of time to make this step more efficient *

ACCOUNT CENTER

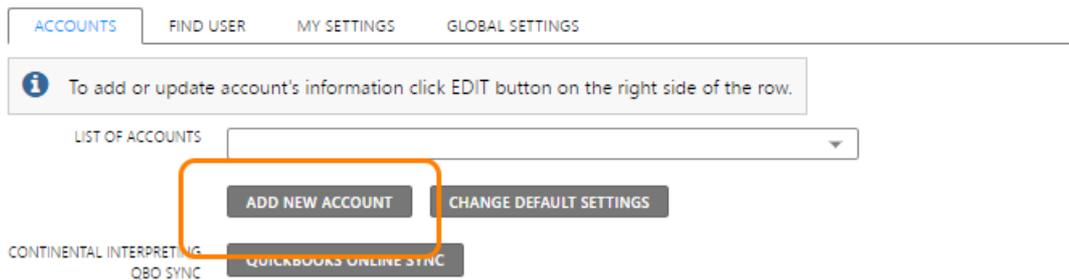
ACCOUNTS FIND USER MY SETTINGS GLOBAL SETTINGS

To add or update account's information click EDIT button on the right side of the row.

LIST OF ACCOUNTS

ADD NEW ACCOUNT CHANGE DEFAULT SETTINGS

CONTINENTAL INTERPRETING QBO SYNC QUICKBOOKS ONLINE SYNC

A screenshot of the 'ACCOUNT CENTER' interface, similar to the one above. The 'ADD NEW ACCOUNT' button is highlighted with a red rectangular box.

4. Fill Out Necessary Fields

* Do not click on Sub Account *

ACCOUNT CENTER

ACCOUNTS CORVEL CORPORATION - CONCORD FIND USER **ADD NEW ACCOUNT** MY SETTINGS GLOBAL SETTINGS

SUB ACCOUNT ?

* ACCOUNT NAME ?
must be at least 3 characters long, no special symbols

ACCOUNT NAME QUICKBOOKS ?

ACCOUNT ALIAS NAME ?

* ACCOUNT TYPE ?

* COUNTRY ?

* STREET ADDRESS ?

SUITE, BUILDING, FLOOR ?

* CITY ?

* STATE ?

* ZIP CODE ?

* TIME ZONE ?

LOCATION IS OBSERVING DAYLIGHT SAVING ?

SUBMIT **CANCEL**

- **ACCOUNT NAME**
 - Enter the name and city with a dash as a separator (Example: Account Name - City)
- **ACCOUNT NAME QUICKBOOKS**
 - This will be generated automatically and should remain blank. Disregard unless instructed to overwrite the default.
- **ACCOUNT TYPE**
 - Choose an option that states the type of organization only (not including "Rates" or other information), such as "Law Firm," "Insurance Company," "School District," or "Court Reporting Agency."
- **COUNTRY**
 - By default, this will be United States.
- **ADDRESS INFORMATION**
 - Fill out street address, suite, building floor, city, state, zip code
- **TIME ZONE**
 - Be sure to select the correct time zone as clients could be in other time zones.
- **LOCATION IS OBSERVING DAYLIGHT SAVING**
 - This is checked by default. Leave as is unless instructed to change.

4. Submit

5. Navigate to Users Tab

You will add Users (Client Contacts) in the following tab. This is the only place where you can manage Users (i.e. Requester, Attorney, etc).

ACCOUNT CENTER

ACCOUNTS NOTED REPORTERS, INC. FIND USER MY SETTINGS GLOBAL SETTINGS
GENERAL LOCATIONS **USERS** ACCOUNTING AND FINANCE LIST OF SERVICES RATES :: POs AND BUDGETS :: POLICIES ACCOUNT NOTES TAGS SETTINGS On the Spot! Flawless Analytics

To add a new user, select Add New User.

ACCOUNT CENTER

ACCOUNTS NOTED REPORTERS, INC. FIND USER ADD NEW ACCOUNT MY SETTINGS GLOBAL SETTINGS
GENERAL LOCATIONS **USERS** ACCOUNTING AND FINANCE LIST OF SERVICES RATES :: POs AND BUDGETS :: POLICIES ACCOUNT NOTES TAGS SETTINGS On the Spot! Flawless Analytics

LIST OF USERS SCHEDULING DEPARTMENT

USERS Department, Scheduling :: Manager (36525) ? **ADD NEW USER**

BETA MS TEAMS USERS ? **SAVE USERS**

The following is an example of a completed User profile with all the necessary fields and correct formatting.

ACCOUNT CENTER

ACCOUNTS NOTED REPORTERS, INC. FIND USER MY SETTINGS GLOBAL SETTINGS
GENERAL LOCATIONS **USERS** ACCOUNTING AND FINANCE LIST OF SERVICES RATES :: POs AND BUDGETS :: POLICIES ACCOUNT NOTES TAGS SETTINGS

LIST OF USERS SCHEDULING DEPARTMENT

SALUTATION	<input type="text"/>	?	*	USER NAME	<input type="text" value="scheduling.department"/>	?
* FIRST NAME	<input type="text" value="Scheduling"/>	?	*	USER TYPE	<input type="text" value="Manager"/>	?
* LAST NAME	<input type="text" value="Department"/>	?		ACCESS CODE OR ID	<input type="text"/>	?
OCCUPATION	<input type="text"/>	?		REQUIRES APPROVAL	<input type="checkbox"/>	?
* ADDRESS	<input type="text" value="27201 Puerta Real, Suite 130"/>	?	*	E-MAIL	<input type="text" value="Calendar@notedreporters.com"/>	?
SUITE, BUILDING, FLOOR	<input type="text"/>	?		SEND E-MAILS	<input checked="" type="checkbox"/>	?
* CITY	<input type="text" value="Mission Viejo"/>	?		USE FOR IMPORTED ASSIGNMENTS	<input type="checkbox"/>	?
* STATE	<input type="text" value="California"/>	?		SKYPE	<input type="text"/>	?
* ZIP CODE	<input type="text" value="92691"/>	?	*	TIME ZONE	<input type="text" value="Pacific Time Zone"/>	?
PHONE NUMBER	<input type="text" value="833"/> <input type="text" value="608"/> <input type="text" value="3348"/> <input type="text"/>	?		LOCATION IS OBSERVING DAYLIGHT SAVING	<input checked="" type="checkbox"/>	?
	AREA CODE EXTENSION			PROFILE STATUS	<input checked="" type="radio"/> Confirm at login <input type="radio"/> Activated <input type="radio"/> Blocked <input type="radio"/> Deactivated	?
MOBILE PHONE NUMBER	<input type="text"/> <input type="text"/> <input type="text"/>	?				
	AREA CODE					

SAVE PROFILE **CLOSE**

- **FIRST NAME, LAST NAME, ADDRESS, CITY, STATE, ZIP CODE, PHONE NUMBER**
 - Fill this out as usual
 - You will notice in the example above, that the User profile that is used for a Department here is the Scheduling Department.
- **USERNAME**
 - Follow this format: first name.last name (i.e. "scheduling.department" for the example above)
- **USER TYPE**
 - Always enter "Manager" for the User Type.
- **EMAIL & SEND E-MAILS**
 - Enter the email as usual

- Be sure to select "Send E-mails" or the User will not receive automated notification messages from SI.
- **TIME ZONE**
 - Fill out as usual.
- **LOCATION IS OBSERVING DAYLIGHT SAVING**
 - This is checked by default. Leave as is unless instructed to change.
- **PROFILE STATUS**
 - Choose "Confirm at login"
- **PASSWORD SETTINGS**
 - You will need to set up a password for the new account.
 - Copy/paste the following into both Password and Confirm Password fields: Si2023.onbrd

**** After you review the above, you can click Save ****

6. Review Settings (Documents and Conference Platforms) Tabs

Navigate and complete the following to finish setting up the Parent Account.

- **DOCUMENTS > INTERNAL SERVICE REQUEST TEMPLATE**
 - For Calendar/Legal, confirm that this form is set to "Legal Interpreting"

ACCOUNT CENTER

ACCOUNTS	NOTED REPORTERS, INC.	FIND USER	ADD NEW ACCOUNT	MY SETTINGS	GLOBAL SETTINGS					
GENERAL	LOCATIONS	USERS	ACCOUNTING AND FINANCE	LIST OF SERVICES	RATES :: POs AND BUDGETS :: POLICIES	ACCOUNT NOTES	TAGS	SETTINGS	On the Spot!	Flawless Analytics
DOCUMENTS	CUSTOM PAPERWORK	OPTIONS	SCHEDULE	INTEGRATION	BRIDGE	VALIDATION	CONFERENCE PLATFORMS			
W-2 EMPLOYEE PAPERWORK TEMPLATE	Interpreter Assignment Confirmation - Legal									
W-2 EMPLOYEE MEMO TEMPLATE										
1099-MISC VENDOR PAPERWORK TEMPLATE	Interpreter Assignment Confirmation - Legal									
1099-MISC VENDOR CONTRACT TEMPLATE										
INTERNAL SERVICE REQUEST TEMPLATE	Legal Interpreting									
CLIENT SERVICE REQUEST TEMPLATE	Legal Interpreting									
CLIENT ON-DEMAND VRI REQUEST TEMPLATE										
CLIENT PAPERWORK TEMPLATE	Client Order Confirmation - Legal									
On the Spot! TEMPLATE										

- **CONFERENCE PLATFORMS**
 - The following platforms will be added automatically: Google Meets, Microsoft Teams, RingCentral, Zoom. Review that this looks good before saving your changes.

ACCOUNT CENTER

ACCOUNTS **NOTED REPORTERS, INC.** FIND USER ADD NEW ACCOUNT MY SETTINGS GLOBAL SETTINGS

GENERAL LOCATIONS USERS ACCOUNTING AND FINANCE LIST OF SERVICES RATES :: POs AND BUDGETS :: POLICIES ACCOUNT NOT

DOCUMENTS CUSTOM PAPERWORK OPTIONS SCHEDULE INTEGRATION BRIDGE VALIDATION **CONFERENCE PLATFORMS**

PLATFORMS

<input type="checkbox"/>	Adobe Connect	?
<input type="checkbox"/>	All Access	
<input type="checkbox"/>	amwell	
<input type="checkbox"/>	Ascension Connect	
<input type="checkbox"/>	Athena	
<input type="checkbox"/>	AVA	
<input type="checkbox"/>	BigBlueButton	
<input type="checkbox"/>	Blackboard Collaborate	
<input type="checkbox"/>	Blue Jay Health	
<input type="checkbox"/>	BlueJeans	
<input type="checkbox"/>	bluestream	

RATE OPTION ?

SELECT ALL **CLEAR ALL** **SAVE CHANGES**

6. Save Changes

You have completed setting up a Parent Account and can proceed to created Subaccounts with Rates (this is a separate step).