

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 web-based interface for managing legal interpreting assignments. At the top, a navigation bar includes links for 'Today', 'Schedule interpreter', 'Find assignment', 'Journal report', 'ISO report', 'piConnector schedule', 'Glance', 'Time off', and 'Find vendor'. Below this, a status summary shows: 1 TOTAL, 1 OPEN, 0 READY TO ASSIGN, 0 NO INTERPRETER, 0 REQUIRES APPROVAL, and 0 CANCELLED. A 'Table view' link and 'Filters are OFF' indicator are also present.

On the left, a calendar for September 2022 is shown, with the 27th highlighted. Below the calendar, a summary for September 27th indicates 'Total assignments: 9'. For October 2022, it shows 'Open: 1' and 'No broadcast: 1'. A 'SHOW CALENDAR' button is at the bottom left.

The main area features a timeline from 6:00 am to 12:00 pm. A pop-up window for a specific assignment is visible, containing the following details:

- 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

At the bottom of the interface, a toolbar contains various action buttons: '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 rectangle.

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	Basmdjian, 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.

The screenshot shows the Continental Interpreting Scheduling tool interface. The top bar includes the Plunet logo, navigation tabs (SCHEDULE, ACCOUNTING, TOOLS AND SETTINGS, LOG OUT), and user information (Welcome Ms. Gabriela Garcia • Continental Interpreting). The main area displays a calendar for July 2022 with a pop-up window for assignment details. The pop-up window shows the following information:

- 100154 GERMAN 12:00 pm / 1:00
- Zero Test
- 600 Commerce Street, 6th Floor New Tower
- Dallas, TX 75202
- Record ID: 123456
- NOT ASSIGNED

The interface also includes a sidebar with navigation links (Today, Schedule interpreter, Find assignment, Journal report, ISO report, siConnector schedule, Glance, Time off, Find vendor) and a bottom bar with various action buttons (Request details, Edit, Reschedule, Clone request, Cancel, Journal, Assign interpreter, No Vendor, Additional documents, Compliance report, Appointment 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.

Entering & Broadcastin... | Schedu x ScheduleInterpreter and Pronto T x +

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

Plunet

SCHEDULE ACCOUNTING TOOLS AND SETTINGS a 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 0

100154 GERMAN 12:00 pm / 1:00

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 Appointment report ISO Reporting Control center

Total assignments: 1

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: 1

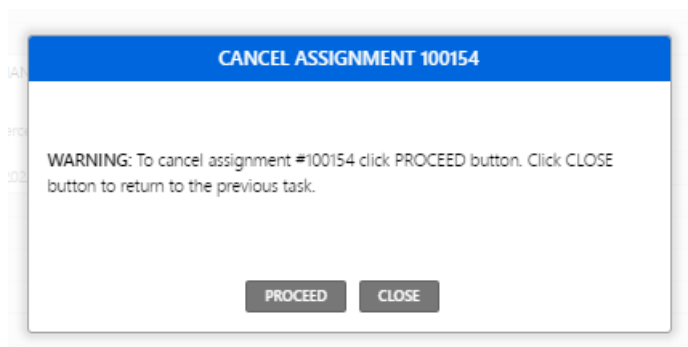
Month Year

January

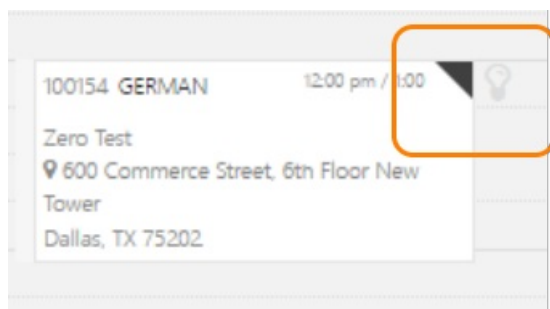
SHOW CALENDAR

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.

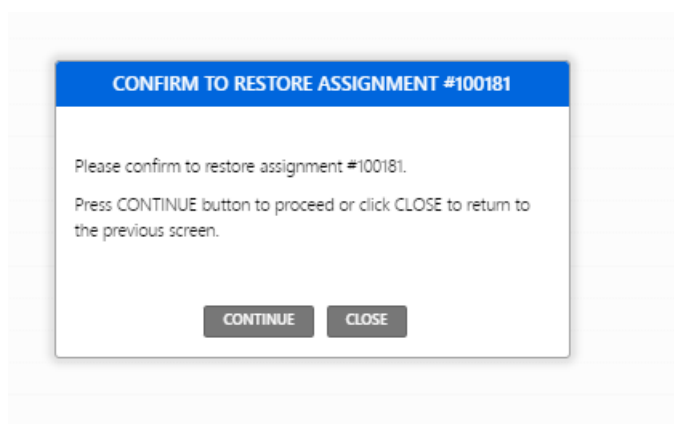


4. Verify via Journal

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.

CONTROL CENTER :: ASSIGNMENT #100181

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@cls-inc.com

VENDOR GENDER

Neutral

ACCOUNT NOTES

SERVICE ACCOUNT NOTES

BILL TO ACCOUNT NOTES

INTERPRETER

Avetisyan, Magdalena
📞 818.256.6142 ✉️ magdalena@socglobal.net

Q-TAGS

ADMINISTRATIVE CERTIFIED

PAPERWORK

RESEND PAPERWORK

REMOVE INTERPRETER

DETAILS

RESET

CANCEL ASSIGNMENT

JOURNAL

Journal Entries For Assignment #100181

🔍

🗑️

👤

☰

👉

📍

🔄

🛡️

⊕

GG

📧

Gabriela Garcia
Continental Interpreting

Sep 27, 2022 at 1:05 pm

Assignment is restored.

SI

📧

ScheduleInterpreter®
Automatic

Sep 27, 2022 at 12:52 pm

Cancellation notification is sent to Magdalena Avetisyan.

GG

📧

Gabriela Garcia
Continental Interpreting

Sep 27, 2022 at 12:51 pm

Assignment is cancelled using *Less than 48 hours Cancellation* policy.

GG

📧

Gabriela Garcia
Continental Interpreting

Sep 27, 2022 at 12:51 pm

Assignment is cancelled.

SI

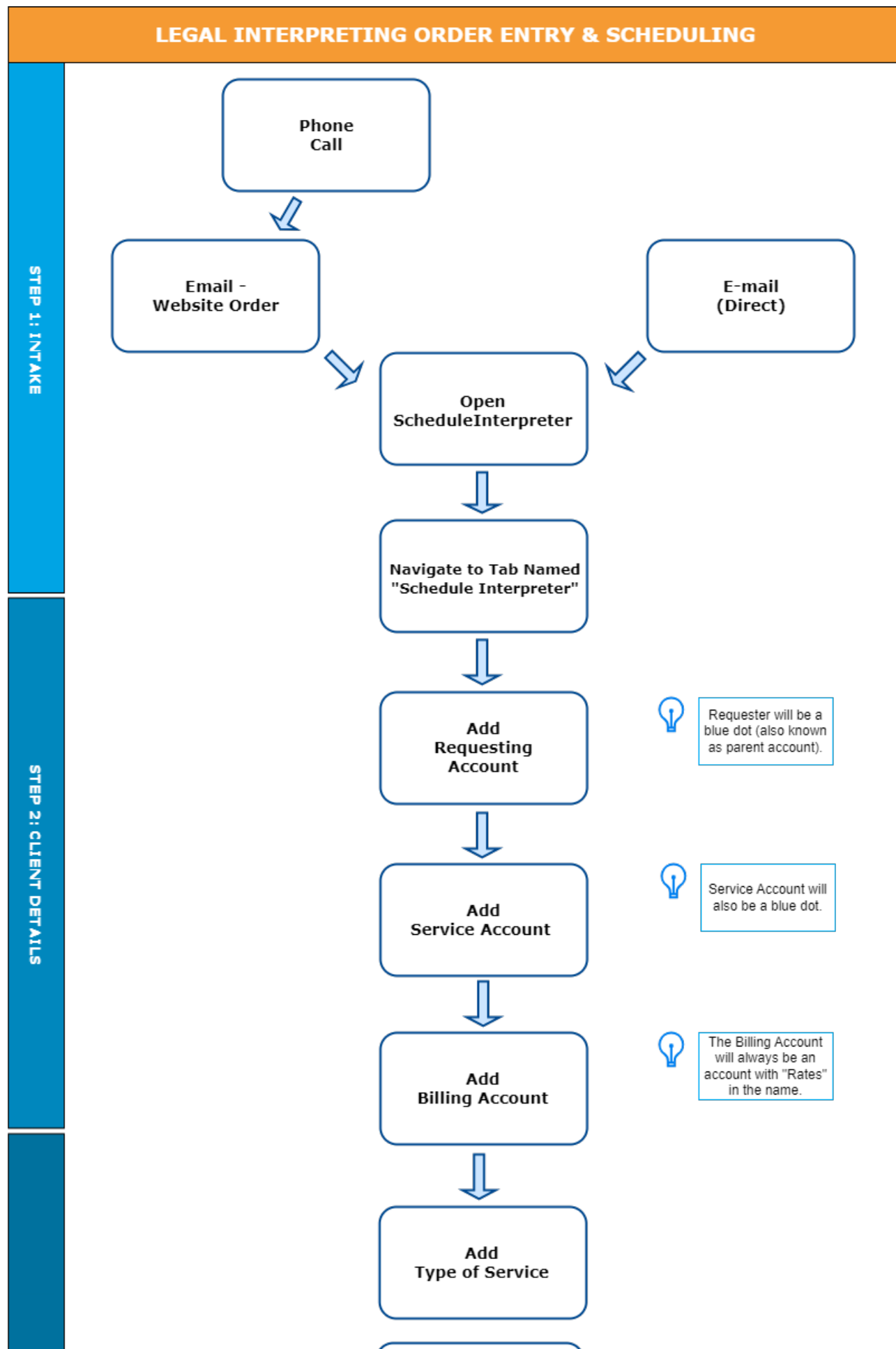
📧

ScheduleInterpreter®
Automatic

Sep 27, 2022 at 12:48 pm

Paperwork with details is e-mailed to Magdalena Avetisyan.

FLOWCHART - LEGAL INTERPRETING ORDER ENTRY & SCHEDULING



STEP 3: ASSIGNMENT DETAILS

Add Dates, Time,
& Duration



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

Add
Target Language

Add
Assignment Type

Add Case
Information

Case Information:

- Case Name
- File Number
- DOL/DOI

Add
Location



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

Add Notes
(Interpreter
& Internal)

Add Tags of
Interpreter
Qualifications

Submit Order
in System

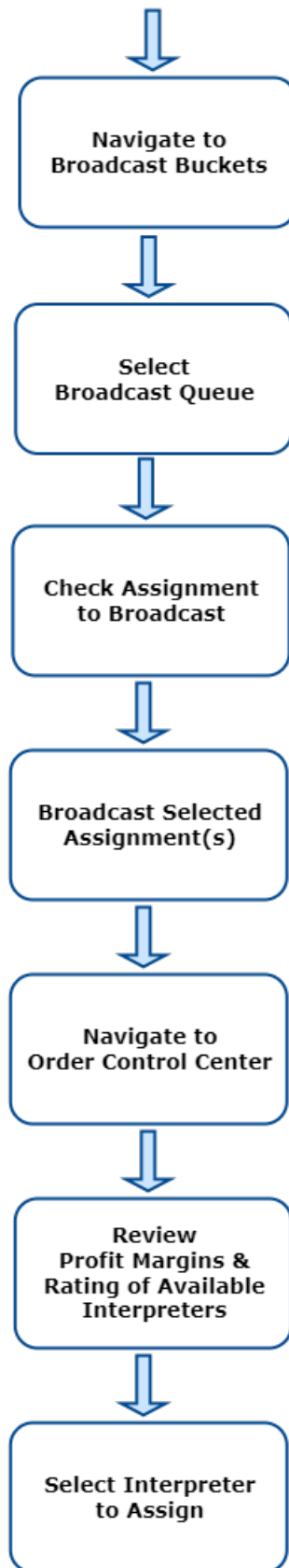
Double Check
Order Confirmation

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 tabs for SCHEDULE, ACCOUNTING, TOOLS AND SETTINGS, and LOG OUT. Below the navigation bar, there are icons for various scheduling tools: Today, Schedule interpreter, Find assignment, Journal report, ISO report, siConnector schedule, Glance, Time off, and Find vendor. The main area shows a calendar for July 2022, with the 12th highlighted. A summary bar indicates 1 TOTAL, 1 OPEN, 0 READY TO ASSIGN, 0 NO INTERPRETER, and 0 REQUIRES APPROVAL. A detailed view of the assignment for July 12th is shown, including the time slot (12:00 pm / 1:00 pm) and the assignment details: 100154 GERMAN, Zero Test, 600 Commerce Street, 6th Floor New Tower, Dallas, TX 75202. The record ID is 123456, and the status is NOT ASSIGNED. A toolbar at the bottom provides options for Request details, Edit, Reschedule, Clone request, Cancel, Journal, Assign interpreter, No Vendor, Additional documents, Compliance report, Appointment report, ISO Reporting, and Control center.

Entering & Broadcastin... | Schedu x | 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 0

100154 GERMAN 12:00 pm / 1:00 pm

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 Appointment report ISO Reporting Control center

Total assignments: 1

August 2022

Month Year

January

SHOW CALENDAR

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 shows the Continental Interpreting web application interface. At the top, there's a navigation bar with tabs: SCHEDULE, ACCOUNTING, TOOLS AND SETTINGS, and LOG OUT. Below this is a header with the Continental Interpreting logo and a welcome message for Ms. Gabriela Garcia. The main area features a calendar on the left for July 2022, with the 12th selected. A pop-up window displays details for a 12:00 pm assignment: '100154 GERMAN', 'Zero Test', '600 Commerce Street, 6th Floor New Tower, Dallas, TX 75202', 'Record ID: 123456', and 'NOT ASSIGNED'. Below the pop-up, a ribbon contains various action buttons, with 'Reschedule' highlighted by an orange box.


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

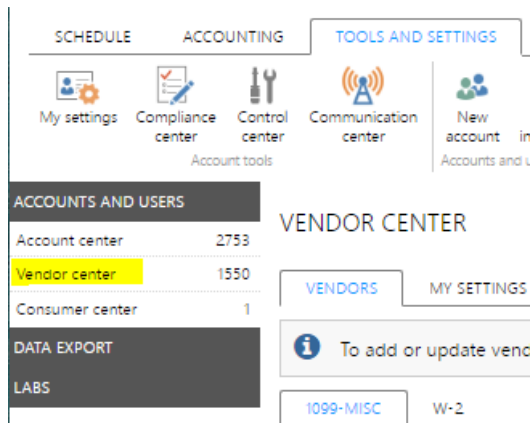
Check the Details tab and Journal to confirm the change was entered properly and that the client and vendor received reschedule notifications.

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@zbcglobal.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	armenian9111@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

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"/>

?

SELECT ALL

CLEAR SELECTION

SAVE

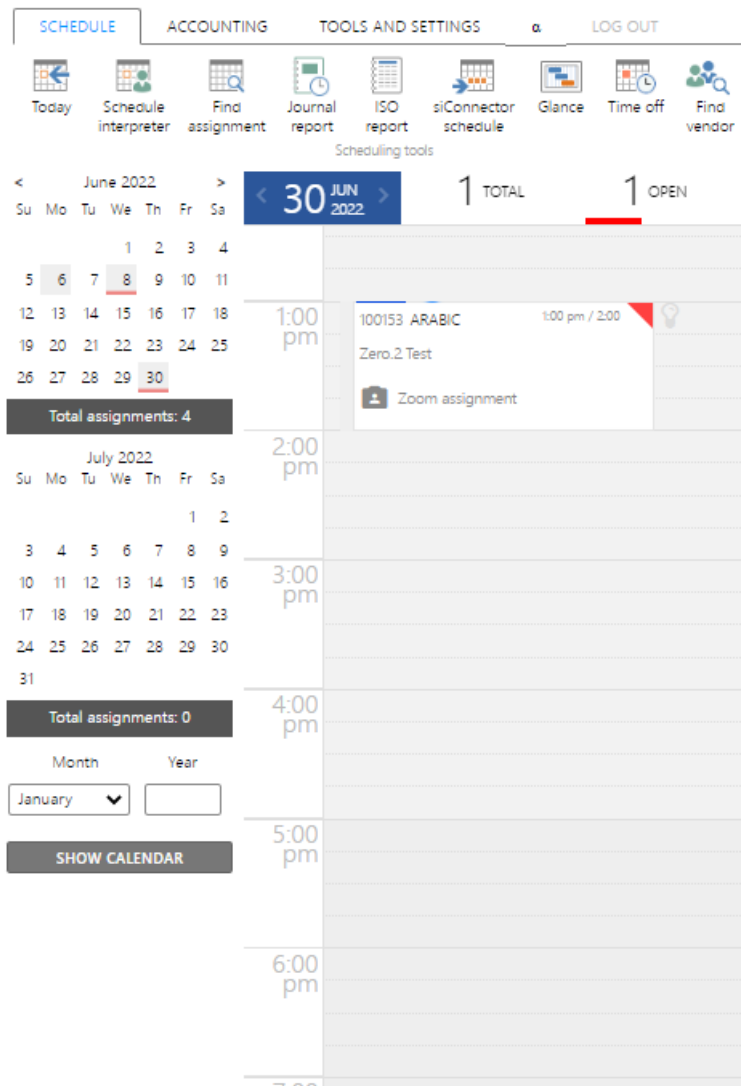
4. Save

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

GUIDE - ADDING JOURNAL NOTES IN CONTROL CENTER

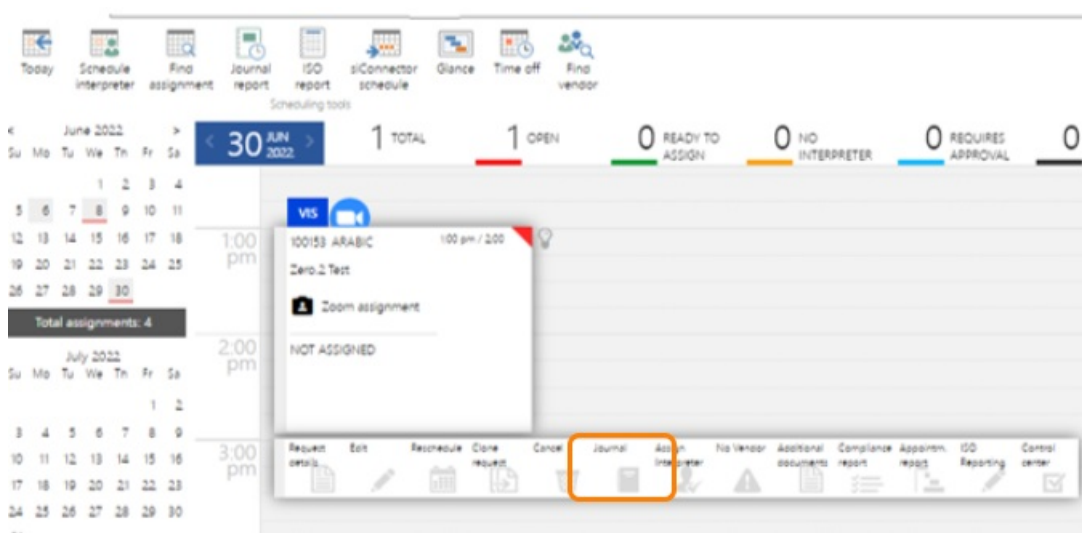
1. Open Calendar & Look for Assignment

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



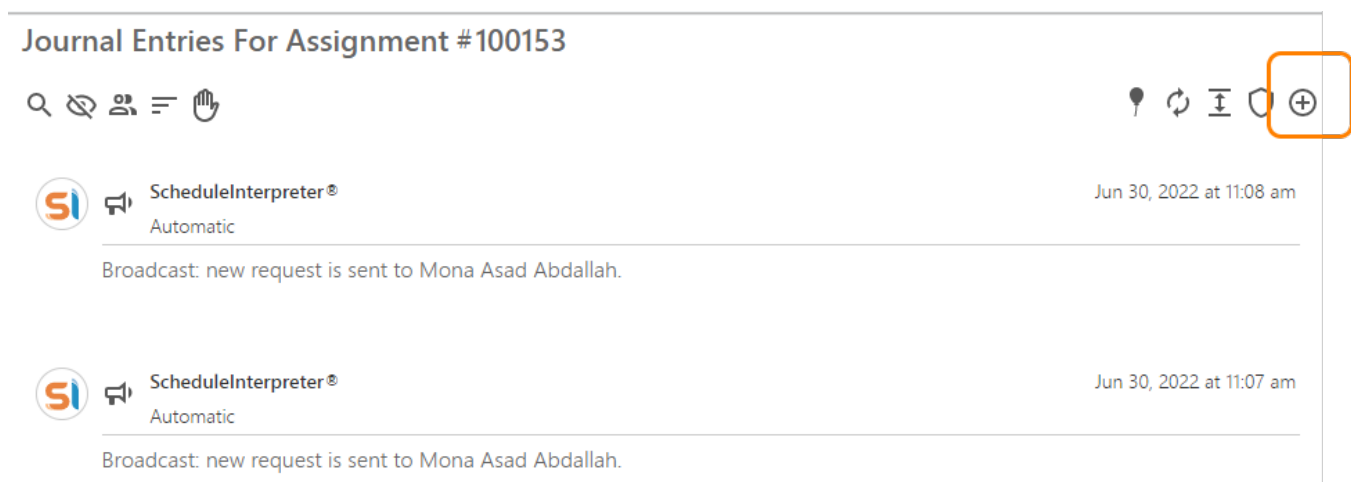
2. Select Journal

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.

← CONTROL CENTER :: ASSIGNMENT #100153

DETAILS

ASSIGN INTERPRETER

RESCHEDULE

BROADCAST

MODALITY

VIS

SERVICE

Arabic

DATE AND TIME

June 30, 2022 at 1:00 PM (Pacific Time Zone) Estimated end time 3:00 PM (2:00)

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 lourdesg@cis-inc.com

SCHEDULED

June 30, 2022 at 10:14 AM by Support Desk
[800.201.7121](tel:800.201.7121) scheduleinterpretertesting@outlook.com

VENDOR GENDER

Neutral

CANCEL ASSIGNMENT

JOURNAL

RESET COORDINATES

Journal Entries For Assignment #100153

🔍 🗑️ 👤 ⌵ 🖱️

📍 ↺ ⌵ 🗑️ +

GG

Gabriela Garcia
Continental Interpreting

Feb 9, 2023 at 2:46 pm

test journal entry

SI

ScheduleInterpreter®
Automatic

Jun 30, 2022 at 11:08 am

Broadcast: new request is sent to Mona Asad Abdallah.

SI

ScheduleInterpreter®
Automatic

Jun 30, 2022 at 11:07 am

Broadcast: new request is sent to Mona Asad Abdallah.

SI

ScheduleInterpreter®
Automatic

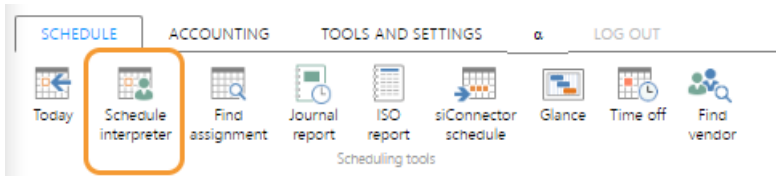
Jun 30, 2022 at 11:06 am

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 ☐ ?
HOUR MINUTES

- 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 (dropdown menu open showing list of languages)

ASSIGNMENT TYPE: [text input]

CONFERENCE PLATFORM: [text input]

INTERPRETER GENDER: ☐ Female

CASE NAME: [text input]

CASE TYPE: [text input]

LEP NAME: [text input]

CASE NUMBER: [text input]

FILE NUMBER: [text input]

Language list (from dropdown):

- 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.**

Virtual Interpreting Service - VIS, VIS

- **NOTES FOR INTERPRETER**

- Include important or additional notes for the interpreter.

- **INTERNAL ORDER NOTES**

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

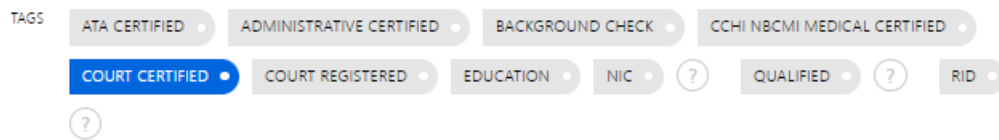
4. Interpreter Qualifications

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

CIS No.: 100156



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:	AAA / Metro Litigation Los Angeles
Adjuster:	
Address:	2601 South ... Angeles
State, Zip Code:	CA ...
Claim/Policy Number	
	Cross/Insury

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:			

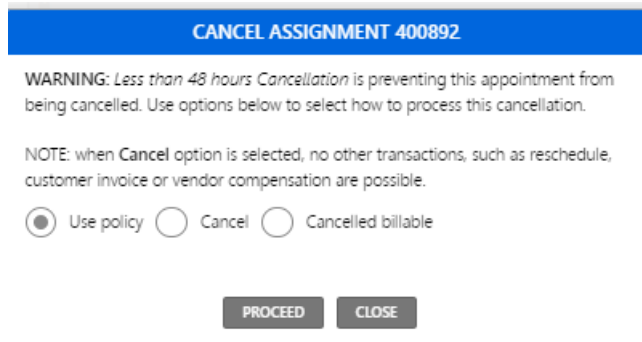
GUIDE - CANCELLATION OPTIONS

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.

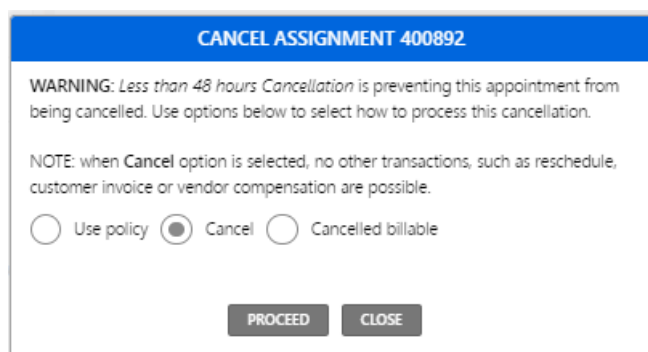
☒ Use policy ☐ Cancel ☐ Cancelled billable

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 displays the Order Control Center 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, a status bar shows: 1 TOTAL, 1 OPEN, 0 READY TO ASSIGN, 0 NO INTERPRETER, 0 REQUIRES APPROVAL, and 0 CANCELLED. A calendar on the left shows September 2022 with the 27th selected. A details pop-up for assignment 100181 ARMENIAN is shown, listing client information and location. At the bottom, a toolbar contains various action buttons, with the 'Control center' button highlighted by 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, Magdalina
818.256.6142 magdalina@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

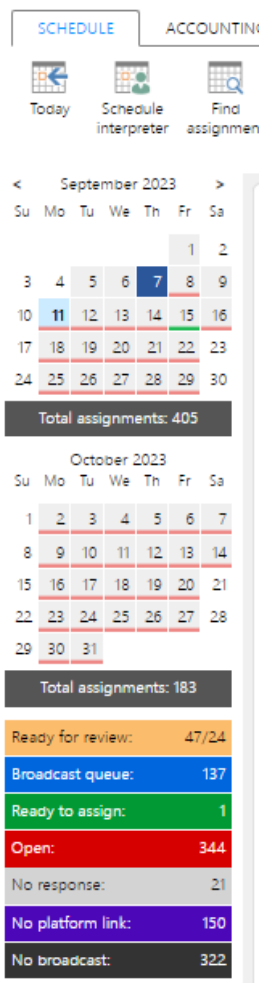
Your assignment is open (not assigned) again.

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

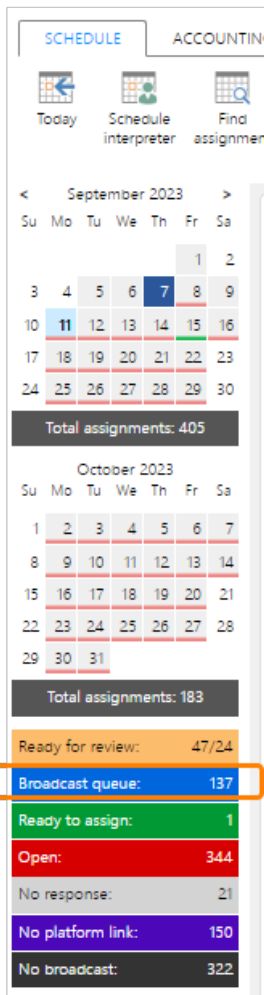
1. Navigate to Broadcast Buckets (Sidebar)

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

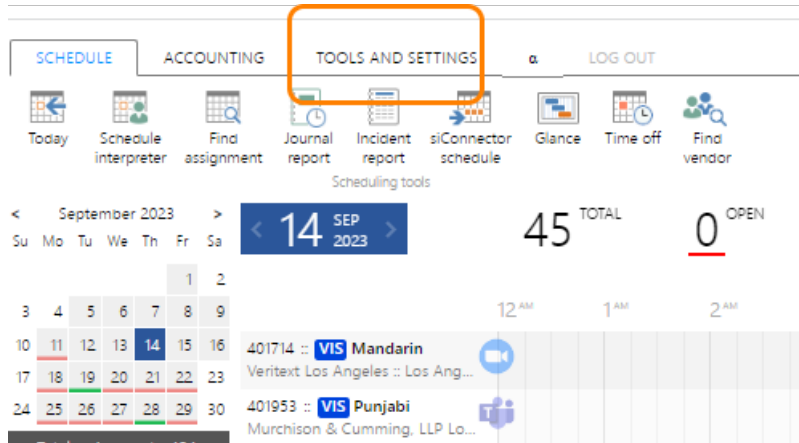
BROADCAST SELECTED

GUIDE - CREATING PARENT ACCOUNTS

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

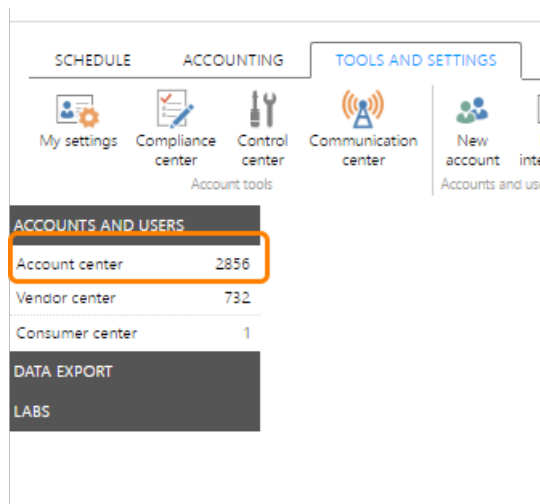
1. Go to Tools and Setting Tab

Navigate to the top menu in ScheduleInterpreter.



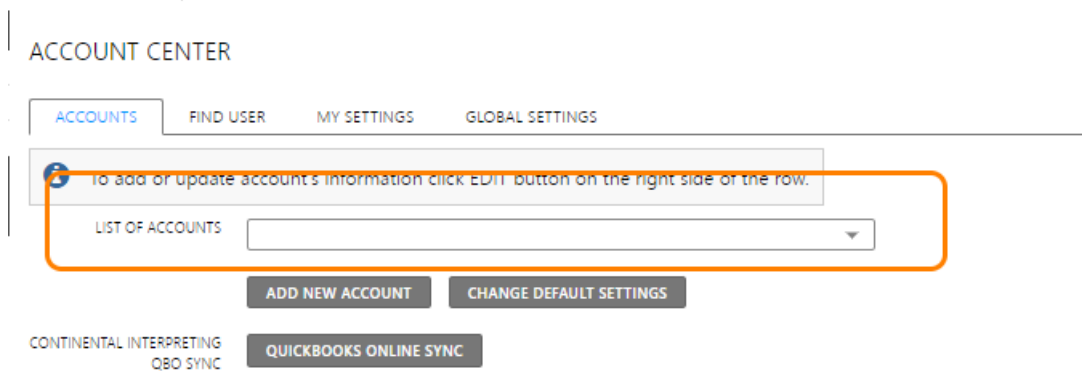
2. Navigate to Account Center

View the sidebar menu under Accounts and Users.



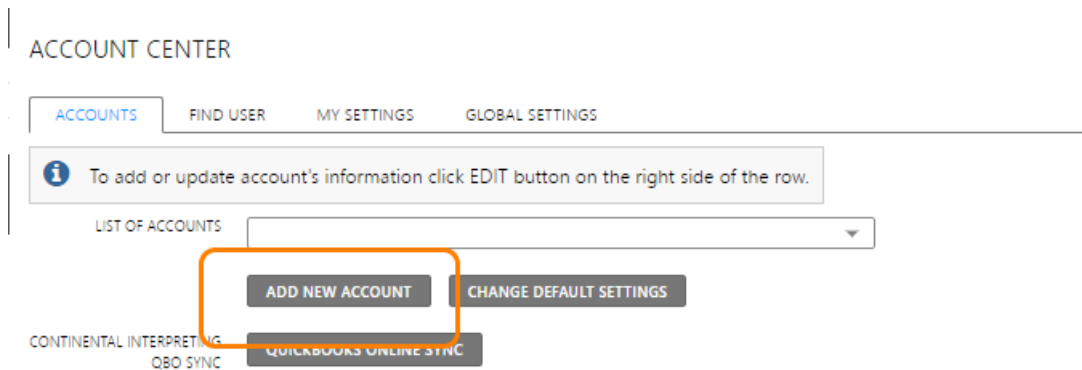
- **QUALITY CONTROL CHECK**

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.



3. Select Add New Account

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



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

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 ? *

* FIRST NAME Scheduling ? *

* LAST NAME Department ?

OCCUPATION ?

* ADDRESS 27201 Puerta Real, Suite 130 ? *

SUITE, BUILDING, FLOOR ?

* CITY Mission Viejo ?

* STATE California ?

* ZIP CODE 92691 ? *

PHONE NUMBER 833 608 3348 ?

MOBILE PHONE NUMBER ?

USER NAME scheduling.department ?

USER TYPE Manager ?

ACCESS CODE OR ID ?

REQUIRES APPROVAL ?

E-MAIL Calendar@notedreporters.com ?

SEND E-MAILS ?

USE FOR IMPORTED ASSIGNMENTS ?

SKYPE ?

TIME ZONE Pacific Time Zone ?

LOCATION IS OBSERVING DAYLIGHT SAVING ?

PROFILE STATUS ☒ Confirm at login ☐ Activated ☐ Blocked ☐ Deactivated ?

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

☐

Adobe Connect

☐

All Access

☐

amwell☐☐☐☐☐☐☐☐

RATE OPTION

OSI

?

SELECT ALL

CLEAR ALL

SAVE CHANGES

APPLY TO ...

6. Save Changes

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