

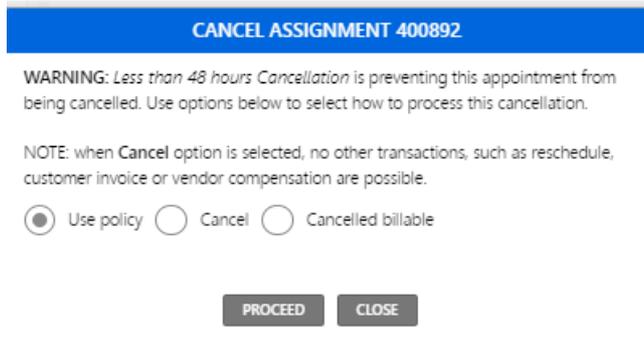
GUIDE - CANCELLATION OPTIONS

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. *

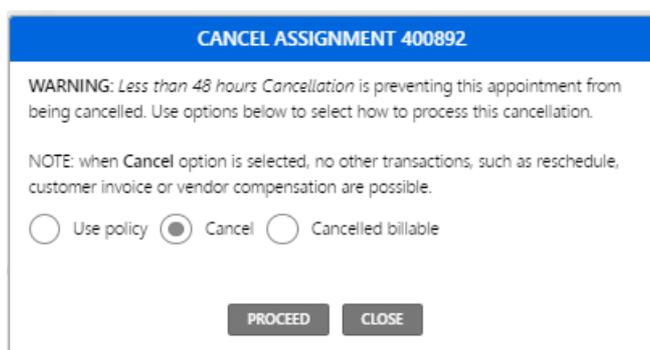


The screenshot shows a dialog box titled "CANCEL ASSIGNMENT 400892". It contains a warning message: "WARNING: Less than 48 hours Cancellation is preventing this appointment from being cancelled. Use options below to select how to process this cancellation." Below the warning is a note: "NOTE: when Cancel option is selected, no other transactions, such as reschedule, customer invoice or vendor compensation are possible." There are three radio button options: "Use policy" (which is selected), "Cancel", and "Cancelled billable". At the bottom of the dialog are two buttons: "PROCEED" and "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.



The screenshot shows the same dialog box as above, but with the "Cancel" radio button selected. The "Use policy" and "Cancelled billable" options are unselected. The "PROCEED" and "CLOSE" buttons remain at the bottom.

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.

🔄 Revision #10

★ Created Tue, Aug 8, 2023 11:44 PM by Gabriela Garcia

✎ Updated Thu, Sep 7, 2023 5:25 PM by Gabriela Garcia