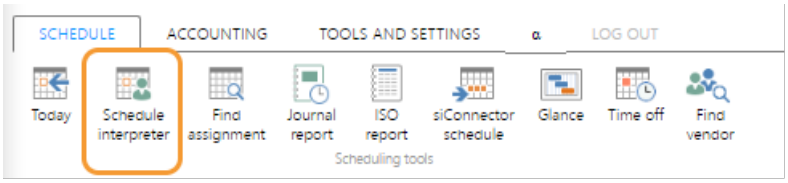
GUIDE - ENTERING LEGAL INTERPRETING ORDERS

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.

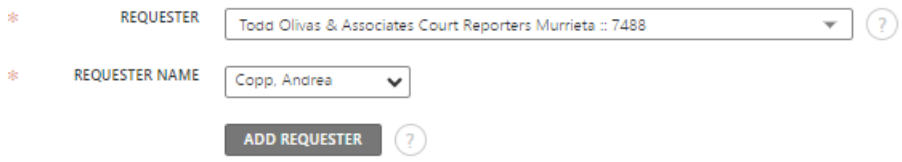


2. Client Details

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).

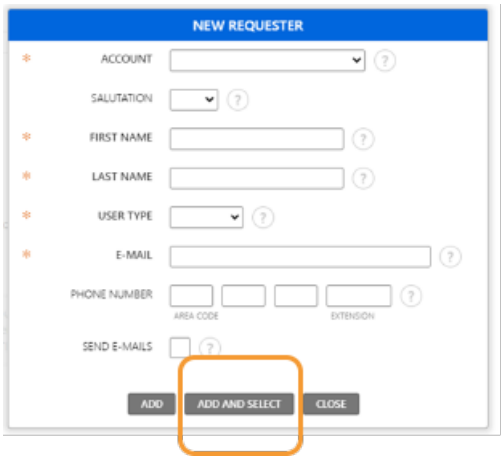


    If the client does not auto-populate within this tab go to the LOOKUP tab to search by additional criteria.

    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."

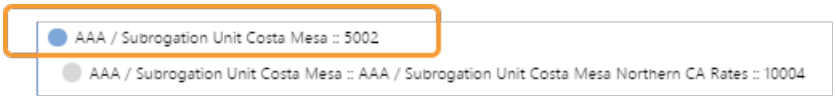


- ## SERVICE ACCOUNT
  - What is the Service Account? The Service Account is the one that will receive the service; the end client, usually the law firm. If the law firm sent a request, the service account is the law firm. Under Service Account, you will indicate the name of the handling attorney.

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

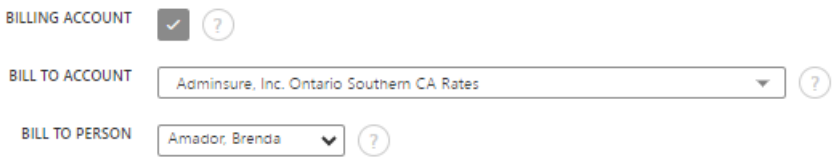
    * Important * It is necessary to select a parent account (blue dot) at this point.

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



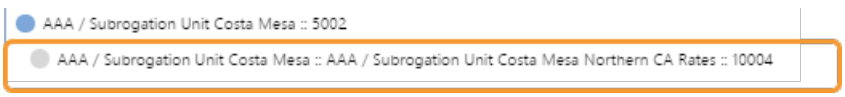
- ## BILLING ACCOUNT
  - What is the Billing Account? This is the account that will receive the invoice for our services.
  - Select the "BILLING ACCOUNT" box whether billing a insurance company or the law firm directly. Once that box is selected the a drop down menu for the Bill To Account will appear.
  - 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.

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

    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.

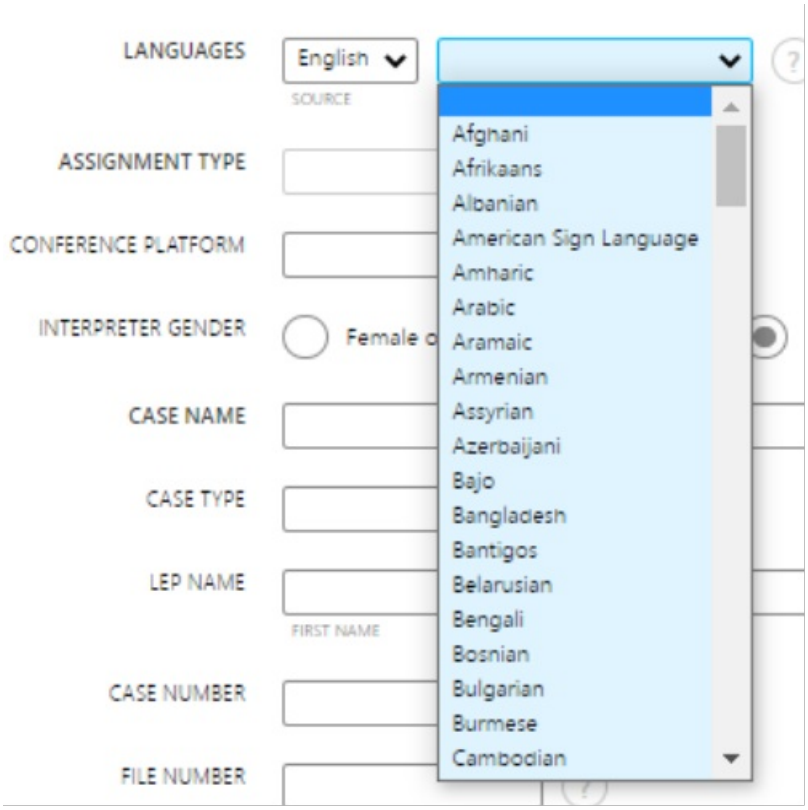
- START TIME
  - Use the dropdown or key in the start time.
  - Select the button for AM or PM.

- ESTIMATED LENGTH
  - Use the dropdown or key in the start time.

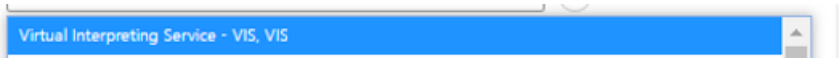
    * Important * Be mindful of the duration while maintaining half day and full day hours. You will need to pay close attention to the assignment type when properly entering the duration.

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



- 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.



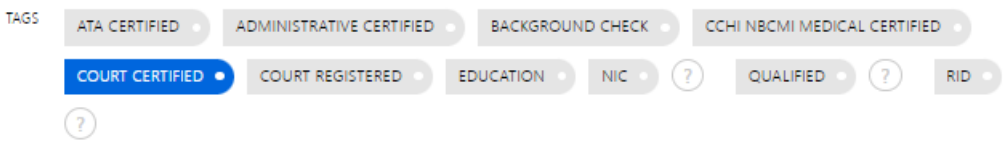
- NOTES FOR INTERPRETER
  - Include important or additional notes for the interpreter.
- INTERNAL ORDER NOTES
  - Add any notes you want to be visible for staff.

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.

Scheduling tools

< 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: January | Year

SHOW CALENDAR

CIS No.: 100156

CONTINENTAL INTERPRETING

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 A
Phone Number:	
Email Address:	

BU	
Client:	AAA / Metro Litigation Los
Adjuster:	
Address:	2601 South
State, Zip Code:	CA
Claim/Policy Number	

Loss/Insury

Angeles

EXAMPLE

SIGNMENT 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:			

Revision #4
Created Mon, Jul 31, 2023 2:14 AM by Ana Mehdaova
Updated Thu, Sep 7, 2023 6:09 PM by Gabriela Garcia