INTAKE/PLACING ORDERS INTO SI

Schedule > Schedule Interpreter (need to import image)

Requester = Court Reporter or Law Firm (who ever emailed or called in the request)

Dropdown menu will allow you to select the individual's name who placed the request (Fix formatting)

Service Account = if ordered by CR then the service account will be the Law Firm. If Law Firm ordered the request the Service Account will be the Law Firm.

Dropdown menu will allow you to select the handling attorney's name. (Fix formatting)

Bill Third Party Box = select the box if we are billing someone other than the handling attorney

Bill To Account = Law Firm, Court Reporter, Insurance Company

Dropdown menu will allow you to select the individual who will be receiving the invoice (Fix formatting)

Appointment Type = Regular (regardless if it is a Rush request or Emergency, etc. for now we will always have this selected as "regular)

Type of Service = OSI – Onsite Interpreting | VIS – Virtual Interpreting Services

Set as recurrent = leave blank/do not select

Conference Platform = leave blank

Languages = English (Source) key in Target language using the dropdown menu

Case Name = Only capitalize the proper names; Example: Test vs. Test

Case Number = Case Number

Case Type = Calendar type – Spanish Legal, Education, OOS Legal & Medical, Spanish Medical, Education

Date of Loss/Injury = Key in DOL/DOI

File Number = Key in clients file number

Claim/Policy Number = Key in claim number

LEP Name = Key in first and last name of the non-English speaker

Assignment Date = Using calendar select the date of service

Start Time = Using dropdown menu select hour, minutes, AM or PM

Estimated Length = Using dropdown menu to select hour and minute

Locations = Using the dropdown menu key in location name OR key in the location address

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