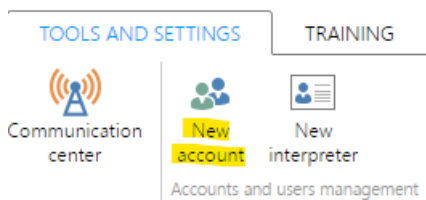


NEW ACCOUNT

Tools and Settings > New Account



Note subaccount only pertains to the main account's billing practices (rates)

Create New Account

Type of account

Account ⓘ Account is created with new set of rules, address and users that manage it. Each account can have unlimited number of sub accounts.

Sub account ⓘ Sub accounts are linked and comply with rules of their master accounts. New group of users can be added to any sub account.

Add **Cancel**

(SI is working on allowing us access to upload MSA)

General

GENERAL LOCATIONS USERS ACCOUNTING AND FINANCE LIST OF SERVICES RATE

CREATED ON Imported

* ACCOUNT NAME AAA / Metro Litigation Los Angeles ⓘ

ACCOUNT NAME QUICKBOOKS Continental Interpreting ⓘ

* ACCOUNT TYPE Insurance Company ⓘ

* COUNTRY United States ⓘ

* STREET ADDRESS 2601 South Figueroa Street ⓘ

* CITY Los Angeles ⓘ

* STATE California ⓘ

* ZIP CODE 90007 ⓘ

* TIME ZONE Pacific Time Zone ⓘ

LOCATION IS OBSERVING DAYLIGHT SAVING ☒ ⓘ

DEFAULT PO ⓘ TAX ID ⓘ

VENDOR ID ⓘ NPI NUMBER ⓘ

CONTRACT ID ⓘ ACCOUNT ID (IMPORT) 583 ⓘ

SAVE CHANGES

Locations - LEAVE EMPTY

GENERAL

LOCATIONS

USERS

ACCOUNTING AND FINANCE

QUICK SEARCH

?

LOCATIONS

?

ADD NEW LOCATION

Users (enter the account's employees - secretary, attorney's, accounts payables, if applicable):

GENERAL

LOCATIONS

USERS

ACCOUNTING AND FINANCE

LIST OF USERS

USERS

ADD NEW USER

GENERAL	LOCATIONS	USERS	ACCOUNTING AND FINANCE	LIST OF SERVICES	RATES :: POs AND BUDGETS :: POLICIES	ACCOUNT NOTES	TAGS	SETTINGS
LIST OF USERS								
NEW USER								
SALUTATION	<input type="text"/>		USER NAME	<input type="text"/>				
FIRST NAME	<input type="text"/>		USER TYPE	<input type="text"/>				
LAST NAME	<input type="text"/>		ACCESS CODE OR ID	<input type="text"/>				
OCCUPATION	<input type="text"/>		E-MAIL	<input type="text"/>				
ADDRESS	<input type="text"/>		SEND E-MAILS	<input type="checkbox"/>				
CITY	<input type="text"/>		USE FOR IMPORTED ASSIGNMENTS	<input type="checkbox"/>				
STATE	<input type="text"/>		SKYPE	<input type="text"/>				
ZIP CODE	<input type="text"/>		TIME ZONE	<input type="text"/>				
PHONE NUMBER	<input type="text"/>		LOCATION IS OBSERVING DAYLIGHT SAVING	<input checked="" type="checkbox"/>				
MOBILE PHONE NUMBER	<input type="text"/>		PROFILE STATUS	<input type="radio"/> Confirm at login <input type="radio"/> Activated <input type="radio"/> Blocked <input type="radio"/> Deactivated				
PASSWORD	<input type="text"/>							
CONFIRM PASSWORD	<input type="text"/>							
<input type="button" value="SAVE PROFILE"/> <input type="button" value="CLOSE"/>								

Accounting & Finance

GENERAL	LOCATIONS	USERS	ACCOUNTING AND FINANCE	LIST OF SERVICES
INVOICING				
NEVER INVOICE		ROUND HALF UP		
<input type="checkbox"/>		<input type="checkbox"/>		
FIRST MONTH OF FISCAL YEAR		ALWAYS USE INITIATION RATE		
<input type="text"/>		<input type="checkbox"/>		
INVOICE TERMS		ALWAYS USE START TIME FOR BILLING		
<input type="text"/>		<input type="checkbox"/>		
ALLOW TO BILL FOR PARKING		ON THE SPOT USE SCHEDULED TIME FOR BILLING		
<input checked="" type="checkbox"/>		<input type="checkbox"/>		
ALLOW TO BILL FOR TOLLS		BILL MINIMUM TIME AT INITIAL RATE		
<input checked="" type="checkbox"/>		<input type="checkbox"/>		
ALLOW TO BILL PER DIEM EXPENSES		LONGER TIME AS MINIMUM BILLABLE		
<input type="checkbox"/>		<input type="checkbox"/>		
ALLOW TO BILL TO A THIRD PARTY		BUNDLE ASSIGNMENTS		
<input checked="" type="checkbox"/>		<input type="checkbox"/>		
THIRD PARTY SINGLE INVOICE		PAPER INVOICE ONLY		
<input type="checkbox"/>		<input type="checkbox"/>		
BILL TO MAIN ACCOUNT				
<input type="checkbox"/>				
IGNORE VENDOR'S LATE TIME				
<input type="checkbox"/>				
LEGACY	BILLING CYCLE	Weekly		
		<input type="text"/>		
LEGACY	BILLING DAY	Default		
		<input type="text"/>		
LEGACY	ENABLE CUSTOMIZED INVOICES	<input type="checkbox"/>		
GROUP INVOICES BY		No special grouping required		
		<input type="text"/>		
ENABLE FORM 1500		<input type="checkbox"/>		
ACTIVATE INVOICE 2.0		<input checked="" type="checkbox"/>		

List of Services

GENERAL

LOCATIONS

USERS

ACCOUNTING AND FINANCE

LIST OF SERVICES

RATES :: POs AND BUDGETS :: POLICIES

ACCOUNT NOTES

TAGS

SERVICES

	SERVICE		
1	Afghani	<input checked="" type="checkbox"/>	
2	Afrikaans	<input checked="" type="checkbox"/>	
3	Albanian	<input checked="" type="checkbox"/>	
4	American Sign Language	<input checked="" type="checkbox"/>	
5	American Sign Language - Education	<input type="checkbox"/>	
6	American Sign Language Med-Legal	<input type="checkbox"/>	
7	Amharic	<input checked="" type="checkbox"/>	
8	Arabic	<input checked="" type="checkbox"/>	
9	Arabic - Education	<input type="checkbox"/>	
10	Arabic Med-Legal	<input type="checkbox"/>	
11	Aramaic	<input checked="" type="checkbox"/>	
12	Armenian	<input checked="" type="checkbox"/>	
13	Armenian Med-Legal	<input type="checkbox"/>	
14	Assyrian	<input checked="" type="checkbox"/>	

SELECT ALL

CLEAR ALL

SAVE CHANGES

AFGHANI

X

AFRIKAANS

X

ALBANIAN

X

AMERICAN SIGN LANGUAGE

X

AMHARIC

X

ARABIC

X

ARAMAIC

X

ARMENIAN

X

ASSYRIAN

X

Rates (on-site, remote):

GENERAL

LOCATIONS

USERS

ACCOUNTING AND FINANCE

LIST OF SERVICES

RATES :: POs AND BUDGETS :: POLICIES

ON-SITE SETTINGS

ON-SITE RATES

ON-SITE FLAT RATE

VIS SETTINGS

VIS RATES

VRI SETTINGS

VRI RATES

OPI :

ENABLE RUSH RATE

☐

?

ENABLE INITIATION FEE

☐

?

ENABLE EMERGENCY RATE

☐

?

ENABLE RUSH FEE

☐

?

ENABLE SPECIAL RATE

☐

?

ENABLE EMERGENCY FEE

☐

?

ENABLE OVERTIME RATE

☒

?

BETA

ENABLE BLOCK RATE

☐

?

SOURCE LANGUAGE/SERVICE

English

?

TARGET LANGUAGE/SERVICE

Afghani

?

CREATE CUSTOM RATE

RESET TO DEFAULT RATE

Modifiers

Apply To (apply other account rates to new clients or existing clients)

Notes

GENERAL

LOCATIONS

USERS

ACCOUNTING AND FINANCE

LIST OF SERVICES

RATES :: POs AND BUDGETS :: POLICIES

ACCOUNT NOTES

NOTES

AUTO POPULATE

SAVE CHANGES

Tags (account tags leave unmarked unless Education and client NEEDS Background Checked Vendors OR if a client needs a Vaccinated Vendor)

ACCOUNT TAGS

APPOINTMENT QUALIFICATION TAGS - Q-TAGS

ACCOUNT TAGS

A LIST

ASL CERTIFIED

ATA

ADMINISTRATIVE CERTIFIED

B LIST

BACKGROUND CHECK

CCMI NBCMI MEDICAL CERTIFIED

COURT CERTIFIED

DEAF CERTIFIED

EDUCATION

FARMERS CONTRACT

FEDERAL

HAS EQUIPMENT

QUALIFIED

REGISTERED LANGUAGE CERTIFIED

VACCINATED

Appointment Qualification Tags (Q-Tags) (these need to be selected)

ACCOUNT TAGS

APPOINTMENT QUALIFICATION TAGS - Q-TAGS

APPOINTMENT Q-TAGS

A LIST

ASL CERTIFIED

ATA

ADMINISTRATIVE CERTIFIED

B LIST

BACKGROUND CHECK

CCMI NBCMI MEDICAL CERTIFIED

COURT CERTIFIED

DEAF CERTIFIED

EDUCATION

FARMERS CONTRACT

FEDERAL

HAS EQUIPMENT

QUALIFIED

REGISTERED LANGUAGE CERTIFIED

VACCINATED

Settings

GENERAL	LOCATIONS	USERS	ACCOUNTING AND FINANCE	LIST OF SERVICES	RATES :: POs AND BUDGETS :: POLICIES	ACCOUNT NOTES	TAGS	SETTINGS
DOCUMENTS								
W-2 EMPLOYEE PAPERWORK TEMPLATE	VOS (Ana test draft)							
W-2 EMPLOYEE MEMO TEMPLATE								
1099-MISC VENDOR PAPERWORK TEMPLATE	Assignment Details - 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	Interpreter Confirmation To Client - Legal							

Options

DOCUMENTS	CUSTOM PAPERWORK	OPTIONS	SCHEDULE	INTEGRATION	VALIDATION	CONFERENCE PLATFORMS
ENABLE BROADCAST QUEUE	<input type="checkbox"/> ?	TARGET MARGIN	none ?	ENABLE ACCESS TO GLOBAL LOCATIONS	<input checked="" type="checkbox"/> ?	
DISABLE RECORD ID	<input type="checkbox"/> ?	ITEMS PER INVOICE	5000 ?			
ENABLE SELF-ASSIGN	<input type="checkbox"/> ?	SEND ALL INVOICES USING SINGLE E-MAIL	<input type="checkbox"/> ?			
ENABLE RECURRENT OPTION FOR SCHEDULING	<input type="checkbox"/> ?	REQUIRE PAPERWORK FOR CANCELLED BILLABLE	<input type="checkbox"/> ?			
REQUIRE PROOF OF WORK	<input checked="" type="checkbox"/> ?	LEGACY ALWAYS COMPENSATE VENDORS FOR MILEAGE	<input type="checkbox"/> ?			
COLLECT VENDOR RATING	<input type="checkbox"/> ?	LEGACY SHOW NAME ON INVOICE	<input checked="" type="checkbox"/> ?			
ENABLE COMPLIANCE REPORTS	<input checked="" type="checkbox"/> ?	LEGACY SHOW DOB ON INVOICE	<input checked="" type="checkbox"/> ?			
ENABLE GOOGLE MAPS	<input type="checkbox"/> ?	LEGACY SHOW TIME IN AND TIME OUT ON INVOICE	<input type="checkbox"/> ?			
ENABLE ASSIGNMENT VOUCHERS	<input type="checkbox"/> ?	LEGACY SHOW RECORD ID ON INVOICE	<input type="checkbox"/> ?			
LIST AS THIRD PARTY "BILL TO"	<input checked="" type="checkbox"/> ?	ENABLE INVOICE ENCRYPTION	<input type="checkbox"/> ?			
BETA ENABLE DEDICATED "BILL TO" PERSON	<input checked="" type="checkbox"/> ?	ASK REQUESTER TO SELECT SUB-ACCOUNT	<input type="checkbox"/> ?			
USE THIRD PARTY SETTINGS FOR BILLING	<input type="checkbox"/> ?	HIDDEN	<input type="checkbox"/> ?			
LEGACY LIST MAIN ACCOUNT NAME ON INVOICE	<input type="checkbox"/> ?					

Conference Platforms

PLATFORMS

☐

Adobe Connect

☐

All Access

☐

amwell

☐

Ascension Connect

☐

Athena

☐

AVA

☐

BigBlueButton

☐

Blackboard Collaborate

☐

Blue Jay Health

☐

BlueJeans

☐

bluestream

?

RATE OPTION

OSI

?

SELECT ALL

CLEAR ALL

SAVE CHANGES

APPLY TO ...

Find Users

ACCOUNTS

AAA / METRO LITIGATION LOS ANGELES :: AAA / METRO LITIGATION LOS ANGELES SOUTHERN CA RATES

FIND USER

*

SEARCH FOR

?

SEARCH