

NEW ACCOUNT

Tools and Settings > New Account

TOOLS AND SETTINGS TRAINING

Communication center

New account New interpreter

Accounts and users management

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

Create New Account

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 RATES

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

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 2601 South Figueroa Street ?		SEND E-MAILS <input type="checkbox"/> ?
* CITY Los Angeles ?		USE FOR IMPORTED ASSIGNMENTS <input type="checkbox"/> ?
* STATE California ?		SKYPE <input type="text"/> ?
* ZIP CODE 90007 ?	*	TIME ZONE Pacific Time Zone ?
PHONE NUMBER <input type="text"/> <input type="text"/> <input type="text"/> ?		LOCATION IS OBSERVING DAYLIGHT SAVING <input checked="" type="checkbox"/> ?
MOBILE PHONE NUMBER <input type="text"/> <input type="text"/> <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"/> ?		

SAVE PROFILE **CLOSE**

Accounting & Finance

GENERAL LOCATIONS USERS **ACCOUNTING AND FINANCE** LIST OF SERVICES

INVOICING PRIVACY SERVICE FORMATS QUICKBOOKS ROUNDING ACCESS

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

TARGET LANGUAGE/SERVICE (?)

CREATE CUSTOM RATE RESET TO DEFAULT RATE

GENERAL LOCATIONS USERS ACCOUNTING AND FINANCE LIST OF SERVICES **RATES :: POS AND BUDGETS :: POLICIES** ACCOUNT NOTES TAGS SETTINGS On the Spot! Flawless Analytics

ON-SITE SETTINGS **ON-SITE RATES** ON-SITE FLAT RATE VIS SETTINGS VIS RATES VRI SETTINGS VRI RATES OPI SETTINGS OPI RATES TRAVEL RATES POS AND BUDGETS POLICIES SURCHARGES

RATES MODIFIERS SETTINGS MODIFIERS APPLY TO ...

DEFAULT

RATE	BILLING CODE	START TIME	END TIME	MIN. BILLED	BILL INCREMENT	REGULAR
Morning hours	<input type="text"/>	12:00 AM	8:00 AM	3 hours	60 minutes	\$ 175.00
Business hours	<input type="text"/>	8:00 AM	5:00 PM	3 hours	60 minutes	\$ 175.00
Evening hours	<input type="text"/>	5:00 PM	12:00 AM	3 hours	60 minutes	\$ 175.00
Morning hours (weekend)	<input type="text"/>	12:00 AM	8:00 AM	3 hours	60 minutes	\$ 175.00
Business hours (weekend)	<input type="text"/>	8:00 AM	5:00 PM	3 hours	60 minutes	\$ 175.00
Evening hours (weekend)	<input type="text"/>	5:00 PM	12:00 AM	3 hours	60 minutes	\$ 175.00

ACTIVE TIME PERIOD: Default

ON CALL SERVICE

ENGLISH/ARABIC

RATE	BILLING CODE	START TIME	END TIME	MIN. BILLED	BILL INCREMENT	REGULAR
Morning hours	<input type="text"/>	12:00 AM	8:00 AM	3 hours	60 minutes	\$ 208.34
Business hours	<input type="text"/>	8:00 AM	5:00 PM	3 hours	60 minutes	\$ 208.34
Evening hours	<input type="text"/>	5:00 PM	12:00 AM	3 hours	60 minutes	\$ 208.34
Morning hours (weekend)	<input type="text"/>	12:00 AM	8:00 AM	3 hours	60 minutes	\$ 208.34
Business hours (weekend)	<input type="text"/>	8:00 AM	5:00 PM	3 hours	60 minutes	\$ 208.34
Evening hours (weekend)	<input type="text"/>	5:00 PM	12:00 AM	3 hours	60 minutes	\$ 208.34

ACTIVE TIME PERIOD: Default

ON CALL SERVICE

ENGLISH/ARMENIAN

RATE	BILLING CODE	START TIME	END TIME	MIN. BILLED	BILL INCREMENT	REGULAR
Morning hours	<input type="text"/>	12:00 AM	8:00 AM	3 hours	60 minutes	\$ 208.34
Business hours	<input type="text"/>	8:00 AM	5:00 PM	3 hours	60 minutes	\$ 208.34

ENGLISH/DARI

RATE	BILLING CODE	START TIME	END TIME	MIN. BILLED	BILL INCREMENT	REGULAR
Morning hours	<input type="text"/>	12:00 AM	8:00 AM	3 hours	60 minutes	\$ 158.34
Business hours	<input type="text"/>	8:00 AM	5:00 PM	3 hours	60 minutes	\$ 158.34

Modifiers

ON-SITE SETTINGS **ON-SITE RATES** ON-SITE FLAT RATE VIS SETTINGS

RATES **MODIFIERS SETTINGS** MODIFIERS APPLY TO ...

MODIFIERS TYPES

Full day 4 hours	<input type="button" value="EDIT"/>	<input type="button" value="DELETE"/>
Full day 6 hours	<input type="button" value="EDIT"/>	<input type="button" value="DELETE"/>

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

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

RATES MODIFIERS SETTINGS MODIFIERS **APPLY TO ...**

HOW TO APPLY

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 CCMJ 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 **CCMJ NBCMI MEDICAL CERTIFIED** **COURT CERTIFIED** **DEAF CERTIFIED** EDUCATION FARMERS CONTRACT **FEDERAL**

HAS EQUIPMENT **QUALIFIED** **REGISTERED LANGUAGE CERTIFIED** **VACCINATED**

Settings

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

*

SEARCH FOR



SEARCH

Revision #3

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