

TRAINING SCHEDULE

Item	Individual(s)	Date	Comments
<p>Layout - Overview:</p> <p>X-Calendar</p> <p>X-Card & Table View</p> <p>Tabs Overview:</p> <p>X-Schedule (brief overview)</p> <ul style="list-style-type: none"> • X-Today • X-Schedule Interpreter • X-Find Assignment • X-Journal Report <p>-Accounting (brief overview)</p> <ul style="list-style-type: none"> • X-Bundle Appointment • X-Review Paperwork • X-Review Center • X-Create Invoices • X-Find Invoices • X-Payment Center • X-Find Vendor Payment • X-Receive Payment <p>-Tools & Settings (brief overview)</p> <ul style="list-style-type: none"> • X-My Settings • X-Compliance Center • X-Control Center • X-Communication Center • X-New Account • X-New Interpreter <p>-Training (brief overview)</p> <ul style="list-style-type: none"> • X-How to navigate • Show Docs • X-Show Alpha <p>-Download (Personal Cell Phones)</p> <ul style="list-style-type: none"> • X-On The Spot 	Gaby, Lourdes, Steph	5/2/2022	"X" signifies completed

<p>Schedule</p> <ul style="list-style-type: none"> • X-Today <ul style="list-style-type: none"> ◦ X-Card/Table View ◦ X-Calendar • X-Schedule Interpreter <ul style="list-style-type: none"> ◦ X-Intake <ul style="list-style-type: none"> ◦ X-Confirmations ◦ X-Upload Notices ◦ X-Card/Table <ul style="list-style-type: none"> ◦ X-Request ◦ X-Edit ◦ X-Reschedule ◦ X-Clone ◦ X-Cancel ◦ X-Journal ◦ X-Assign ◦ X-No Vendor ◦ X-Additional ◦ X-Compliance ◦ X-Control • Find Assignment <ul style="list-style-type: none"> ◦ X-Appointment ID ◦ X-Imported ID ◦ X-Vendor ◦ X-Account ◦ X-Service ◦ X-Record ID ◦ X-Consumer • X-Journal Report • X-Find Vendor <ul style="list-style-type: none"> ◦ X-Active ◦ X-Inactive ◦ X-My Settings • X-Locations <ul style="list-style-type: none"> ◦ X-Edit ◦ X-Add • X-Language <ul style="list-style-type: none"> ◦ X-Edit ◦ X-Add <ul style="list-style-type: none"> ◦ X-Rates • X-Remove Vendor • X-Inactivate Vendor • X-Vendor Allow/Disallow 	Lourdes, Gaby, Steph	5/2/2022	"X" signifies completed
<p>Calendar Workflow</p> <ul style="list-style-type: none"> • X-Checklist will be provided <p>Education Workflow</p> <ul style="list-style-type: none"> • X-Checklist will be provided 	Lourdes, Gaby, Steph	5/2/2022	"X" signifies completed

Accounting <ul style="list-style-type: none"> ● X-Bundle Appointments <ul style="list-style-type: none"> ○ My Settings ● X-Review Paperwork <ul style="list-style-type: none"> ○ X-Ready For Review ○ X-Ready For Invoicing ● X-Review Center <ul style="list-style-type: none"> ○ X-Accounts ○ X-Vendors ○ X-Tools ○ My Settings ● X-Create Invoices <ul style="list-style-type: none"> ○ X-Effective Date ○ X-Billable Period ○ X-Accounts to Bill ● X-Find Invoice <ul style="list-style-type: none"> ○ X-Invoice ID ○ X-Assignment ID ○ X-Account ○ X-Invoice Date ○ X-Service Date ○ X-Interpreter ○ X-Service/Language ○ My Settings ● X-Payment Center <ul style="list-style-type: none"> ○ X-Select Vendors ○ X-Process Payments ○ My Settings ● X-Find Vendor Payment <ul style="list-style-type: none"> ○ X-Assignment ID ○ X-Payment ID ○ X-Vendor Name ○ X-History ● X-Receive Payment <ul style="list-style-type: none"> ○ X-Quick Search 	Lourdes, Steph	5/3/2022	<p>"X" signifies completed</p> <p>Gaby was on PTO she will watch video that Ana from SI recorded</p>
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<p>Tools & Settings</p> <ul style="list-style-type: none"> ● X-New Account <ul style="list-style-type: none"> ○ X-Account <ul style="list-style-type: none"> ○ X-General ○ X-Locations ○ X-Users ○ X-Accounting <ul style="list-style-type: none"> ○ X-Invoicing ○ X-Privacy ○ X-Service ○ X-3rd Party ○ X-List of Services ○ X-Rates <ul style="list-style-type: none"> ○ X-Settings ○ X-Onsite ○ X-Flat Rate ○ X-VIS ○ X-Settings ○ X-VIS Rates ○ X-OPI ○ X-Travel ○ X-Rates ○ X-Account Notes ○ X-Tags ○ X-Settings ○ On the Spot! ○ X-Subaccount <ul style="list-style-type: none"> ○ X-Rates ● X-New Interpreter <ul style="list-style-type: none"> ○ X-General Information <ul style="list-style-type: none"> ○ X-Profile ○ X-Smart ID ○ X-Skills ○ X-Rates ○ X-Exclusion List ○ X-Vendor Notes ○ X-Tags ○ X-Settings ● X-Control Center <ul style="list-style-type: none"> ○ X-Vendors <ul style="list-style-type: none"> ○ X-Edit ○ X-Account <ul style="list-style-type: none"> ○ X-Edit ● X-Control Center <ul style="list-style-type: none"> ○ X-Account Center ○ X-Vendor Center 	<p>Lourdes, Steph</p>	<p>5/4/2022</p>	<p>"X" signifies completed</p> <p>Gaby on PTO - will watch video</p>
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Onboarding Vendor Workflow <ul style="list-style-type: none"> • X-Checklist will be provided 	Lourdes, Steph	5/4/2022	"X" signifies completed Gaby on PTO will pull files from TEAMS
Onboarding Client Workflow <ul style="list-style-type: none"> • X-Checklist will be provided 	Lourdes, Steph	5/4/2022	"X" signifies completed Gaby on PTO will pull files from TEAMS
Communication Center - Templates <ul style="list-style-type: none"> • Schedule <ul style="list-style-type: none"> ◦ New <ul style="list-style-type: none"> ◦ Staff ◦ Vendor ◦ Customer ◦ Assign <ul style="list-style-type: none"> ◦ Staff ◦ Vendor ◦ Customer ◦ Edit <ul style="list-style-type: none"> ◦ Staff ◦ Vendor ◦ Customer ◦ Remove Vendor <ul style="list-style-type: none"> ◦ Staff ◦ Vendor ◦ Customer ◦ No Vendor <ul style="list-style-type: none"> ◦ Staff ◦ Vendor ◦ Customer ◦ Cancel <ul style="list-style-type: none"> ◦ Staff ◦ Vendor ◦ Customer ◦ Coverage Change <ul style="list-style-type: none"> ◦ Staff ◦ Vendor ◦ Customer ◦ Reschedule <ul style="list-style-type: none"> ◦ Staff ◦ Vendor ◦ Customer ◦ Schedule Reminder <ul style="list-style-type: none"> ◦ Staff ◦ Vendor ◦ Customer ◦ Follow up Reminder <ul style="list-style-type: none"> ◦ Staff ◦ Vendor ◦ Customer DOCS	Lourdes, Gaby, Steph	5/5/2022	"X" signifies completed

🔄Revision #5

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