

# TRAINING SCHEDULE

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

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

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

🔄Revision #5

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