TRAINING SCHEDULE

Item	Individual(s)	Date	Comments
Layout - Overview: X-Calendar X-Card & Table View Tabs Overview: X-Schedule (brief overview) ● X-Today ● X-Schedule Interpreter ● X-Find Assignment ● X-Journal Report -Accounting (brief overview) ● 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 -Tools & Settings (brief overview) ● X-My Settings ● X-Compliance Center ● X-Control Center ● X-Communication Center ● X-New Account ● X-New Interpreter -Training (brief overview) ● X-How to navigate ● Show Docs ● X-Show Alpha -Download (Personal Cell Phones) ● X-On The Spot	Gaby, Lourdes, Steph	5/2/2022	"X" signifies completed

Schedule
• X-Today
  ◦ X-Card/Table View
  ◦ X-Calendar
• X-Schedule Interpreter
  ◦ X-Intake
  ◦ X-Confirmations
  ◦ X-Upload Notices
  ◦ X-Card/Table
  ◦ 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
  ◦ X-Appointment ID
  ◦ X-Imported ID
  ◦ X-Vendor
  ◦ X-Account
  ◦ X-Service
  ◦ X-Record ID
  ◦ X-Consumer
• X-Journal Report
• X-Find Vendor
  ◦ X-Active
  ◦ X-Inactive
  ◦ X-My Settings
• X-Locations
  ◦ X-Edit
  ◦ X-Add
• X-Language
  ◦ X-Edit
  ◦ X-Add
  ◦ X-Rates
• X-Remove Vendor
• X-Inactivate Vendor
• X-Vendor Allow/Disallow
	Lourdes, Gaby, Steph	5/2/2022	"X" signifies completed

Calendar Workflow • X-Checklist will be provided Education Workflow • X-Checklist will be provided	Lourdes, Gaby, Steph	5/2/2022	"X" signifies completed

Accounting ● X-Bundle Appointments ○ My Settings ● X-Review Paperwork ○ X-Ready For Review ○ X-Ready For Invoicing ● X-Review Center ○ X-Accounts ○ X-Vendors ○ X-Tools ○ My Settings ● X-Create Invoices ○ X-Effective Date ○ X-Billable Period ○ X-Accounts to Bill ● X-Find Invoice ○ X-Invoice ID ○ X-Assignment ID ○ X-Account ○ X-Invoice Date ○ X-Service Date ○ X-Interpreter ○ X-Service/Language ○ My Settings ● X-Payment Center ○ X-Select Vendors ○ X-Process Payments ○ My Settings ● X-Find Vendor Payment ○ X-Assignment ID ○ X-Payment ID ○ X-Vendor Name ○ X-History ● X-Receive Payment ○ X-Quick Search	Lourdes, Steph	5/3/2022	"X" signifies completed Gaby was on PTO she will watch video that Ana from SI recorded

Tools & Settings ● X-New Account ○ X-Account ○ X-General ○ X-Locations ○ X-Users ○ X-Accounting ○ X-Invoicing ○ X-Privacy ○ X-Service ○ X-3rd Party ○ X-List of Services ○ X-Rates ○ 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 ○ X-Rates ● X-New Interpreter ○ X-General Information ○ X-Profile ○ X-Smart ID ○ X-Skills ○ X-Rates ○ X-Exclusion List ○ X-Vendor Notes ○ X-Tags ○ X-Settings ● X-Control Center ○ X-Vendors ○ X-Edit ○ X-Account ○ X-Edit ● X-Control Center ○ X-Account Center ○ X-Vendor Center	Lourdes, Steph	5/4/2022	"X" signifies completed Gaby on PTO - will watch video

Onboarding Vendor Workflow • X-Checklist will be provided	Lourdes, Steph	5/4/2022	"X" signifies completed Gaby on PTO will pull files from TEAMS
Onboarding Client Workflow • X-Checklist will be provided	Lourdes, Steph	5/4/2022	"X" signifies completed Gaby on PTO will pull files from TEAMS

Communication Center - Templates
• Schedule
  ◦ New
  ◦ Staff
  ◦ Vendor
  ◦ Customer
  ◦ Assign
  ◦ Staff
  ◦ Vendor
  ◦ Customer
  ◦ Edit
  ◦ Staff
  ◦ Vendor
  ◦ Customer
  ◦ Remove Vendor
  ◦ Staff
  ◦ Vendor
  ◦ Customer
  ◦ No Vendor
  ◦ Staff
  ◦ Vendor
  ◦ Customer
  ◦ Cancel
  ◦ Staff
  ◦ Vendor
  ◦ Customer
  ◦ Coverage Change
  ◦ Staff
  ◦ Vendor
  ◦ Customer
  ◦ Reschedule
  ◦ Staff
  ◦ Vendor
  ◦ Customer
  ◦ Schedule Reminder
  ◦ Staff
  ◦ Vendor
  ◦ Customer
  ◦ Follow up Reminder
  ◦ Staff
  ◦ Vendor
  ◦ Customer
DOCS
	Lourdes, Gaby, Steph	5/5/2022	"X" signifies completed

Revision #5
★Created Wed, Feb 2, 2022 5:45 PM by Veronica Amador
✎Updated Thu, May 5, 2022 12:13 PM by Veronica Amador