

# 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>	<p>Gaby, Lourdes, Steph</p>	<p>5/2/2022</p>	<p>"X" signifies completed</p>

<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> <li>○ X-Upload Notices</li> </ul> </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>	<p>Lourdes, Gaby, Steph</p>	<p>5/2/2022</p>	<p>"X" signifies completed</p>
<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>	<p>Lourdes, Gaby, Steph</p>	<p>5/2/2022</p>	<p>"X" signifies completed</p>

<p>Accounting</p> <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>	<p>Lourdes, Steph</p>	<p>5/3/2022</p>	<p>"X" signifies completed</p> <p>Gaby was on PTO she will watch video that Ana from SI recorded</p>
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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

<p>Onboarding Vendor Workflow</p> <ul style="list-style-type: none"> <li>• X-Checklist will be provided</li> </ul>	<p>Lourdes, Steph</p>	<p>5/4/2022</p>	<p>"X" signifies completed Gaby on PTO will pull files from TEAMS</p>
<p>Onboarding Client Workflow</p> <ul style="list-style-type: none"> <li>• X-Checklist will be provided</li> </ul>	<p>Lourdes, Steph</p>	<p>5/4/2022</p>	<p>"X" signifies completed Gaby on PTO will pull files from TEAMS</p>
<p>Communication Center - Templates</p> <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> <p>DOCS</p>	<p>Lourdes, Gaby, Steph</p>	<p>5/5/2022</p>	<p>"X" signifies completed</p>

🔄Revision #5

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