

STAFF TRAINING AGENDA

Day 1 – 3 hours

Configure Company-Wide Settings

- Control center
- Document Designer
- Form Designer
- Data Export and Operations Status
- Report as Backup

Account Center

- Default Settings
- Adding New Accounts
 - Account vs Sub-Account vs Location
- Users
- OTS custom configuration
- Cancellation Policies

Day 2 – 3 hours

Vendor Center

- Default Settings
- Adding New Vendors
- W-2 vs 1099-MISC vs DBA
- Fine Tune Vendor Accounts
- Vendor rates

SiConnector

- Configuration
- Import

Day 3 – 3 hours

Schedule Appointments

- Calendar Views (Card vs Table)
- Color Coding
- Schedule
 - Schedule Interpreter Form Review
 - Regular
 - Rush/Emergency
 - No Broadcasts
 - Cloning
 - Recurring
- Managing Assignments and Assignment Control Center
- Complete/Submit
 - Paper Timesheet/VOS
 - Complete Appointment
 - Submit Paperwork
 - On the Spot!
 - Complete Appointment

- Submission Process Review
- Find Appointment
- Incident Reporting
- Journal Report
- Appointment Status Quick List

Day 4 – 3 hours

Communication Center

- Schedule
- Accounting
- Maintenance
- Settings (Test Mode Recipient)

Reporting

- Preset Reports
 - Performance Report
 - Company
 - Clients
 - Interpreters
 - Languages
 - Summary Report
 - Global (Sub-Account data with Main Account)
 - Global Details (Sub-Account data listed individually)
 - Account (Sub-Account data with Main Account)
 - Account Details (Sub-Account data listed individually)
 - Operations Status Report
 - Settings
 - Revenue Tab

🔄Revision #4

★Created Wed, Aug 31, 2022 9:59 PM by Ana Mehdaova

✎Updated Fri, Sep 2, 2022 5:44 PM by Ana Mehdaova