



# AZFLIS

## AZ Freelance Interpreting Services

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## Interpreter Portal

### Overview

This document is for Agency Interpreters. It explains the system's core concepts, presents screenshots of the user interface and contains detailed written instructions for tasks that Interpreters can perform when they are logged in. Its purpose is to guide Interpreters in working with Agencies and Agency Customers, and in accepting and fulfilling Booking assignments.

While the on-screen user interface may seem complex at first, it is designed to collect and process important details that will benefit you and your Agency going forward and permit both of you to work faster and more efficiently.

A video library is also available which presents the on-screen navigation processes described in the text-based resources.

### Manage Profile

At the top right on the Dashboard page, you will see your username that you used to log in. Under this dropdown, select *User Profile* to manage your information

- Under Configuration, you can change your Password and Time Zone Preference if desired.
- Availability: You can set the times that you are available each day of the week. You will be offered job by this availability.

Remember to click on Save on the left hand side of the page if you make any changes.

### Workflow Process

This section of the manual will guide you through the process of accepting an available Booking or one to which you were assigned. Keep in mind that the level of detail presented here underscores the importance of reliable Booking data in overall system design.

### Dashboard

Log in to your Agency portal with your assigned username and password. This Dashboard view is shown in a laptop experience. Interpreters using mobile devices (such as tablets and smartphones) will see a different layout but overall portal navigation remains consistent.



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Sonja M Garcia Dashboard

Toll Free: 1 (877) 123-1234  
Fax: 1 (888) 123-1234  
Email: sales@demoagency.com

Open Jobs  
47 Jobs Past Due

PACIFIC STANDARD TIME (PST): 11/04/14

| November 2014 |    |    |    |    |    |    |
|---------------|----|----|----|----|----|----|
| Su            | Mo | Tu | We | Th | Fr | Sa |
|               |    |    |    |    |    | 1  |
| 2             | 3  | 4  | 5  | 6  | 7  | 8  |
| 9             | 10 | 11 | 12 | 13 | 14 | 15 |
| 16            | 17 | 18 | 19 | 20 | 21 | 22 |
| 23            | 24 | 25 | 26 | 27 | 28 | 29 |
| 30            |    |    |    |    |    |    |

Quick Links

Calendar

Jobs

Payments

Reports

Mobile Site

Job #

Offered Jobs - 0 Offered Jobs found.

| ID                 | Start Date | Time | Duration | Location | Lng. | Sz. | St. |
|--------------------|------------|------|----------|----------|------|-----|-----|
|                    |            |      |          |          |      |     |     |
| Page 1 of 0        |            |      |          |          |      |     |     |
| No records to view |            |      |          |          |      |     |     |

Messages & Alerts

Today's Job Diary (11/04/14)

|  | ID     | Date     | Time     | Customer      | Location                          | Lng. | Sz. | St.                       | Notes    |
|--|--------|----------|----------|---------------|-----------------------------------|------|-----|---------------------------|----------|
|  |        |          |          |               |                                   |      |     | <div>⬆</div> <div>⬆</div> |          |
| <div>+</div>   | 174925 | 11/04/14 | 11:18 AM | AAA Insurance | <div>📍</div> Corporate Headqua... | spa  | 1   | <div>CLB</div>            | more ... |
| <div>⏪ ⏩ Page 1 of 1 ⏪ ⏩ 20 2</div> <div>View 1 - 1 of 1</div> |        |          |          |               |                                   |      |     |                           |          |

Past Jobs - To be Closed

- **Available Bookings** are presented at the top of the page, if your agency uses this feature
- **Offered Jobs** shows jobs that have been offered to you and are available for acceptance.
- **Today's Job Diary** shows jobs that you are assigning to for a specific day. The day can be change by clicking on the calendar to the left.
- **Past Jobs** show jobs that need to be closed.
- **Quick Links:** On the left, you will find link to quickly take you to other sections on the site.

## Accept/Decline Job

### Offered Jobs

| Offered Jobs - 1 Offered Jobs found. |            |          |          |                      |      |     |     |
|--------------------------------------|------------|----------|----------|----------------------|------|-----|-----|
| ID                                   | Start Date | Time     | Duration | Location             | Lng. | Sz. | St. |
| 166662                               | 10/17/14   | 10:00 AM | 1:00     | Outpatients Depar... | spa  | 1   | OFD |
| Page 1 of 1                          |            |          |          |                      |      |     |     |
| View 1 - 1 of 1                      |            |          |          |                      |      |     |     |

View More

Select

Decline offer

Close

- **View More:** Shows job details, to determine if it is a job that you want to accept.
- **Select:** Accepts the Offered Job
- **Decline Offer:** Refuse the Offered Job

### Assigned Jobs

All assigned jobs will be shown on your Calendar, there is legend to define the colors. This Booking is officially assigned to you unless you formally decline it by notifying your Agency. When you have completed this assignment you can officially *Close* the Booking from the same menu, after which it will be archived and no longer displayed in the *Past Jobs* table.

Navigate to your Calendar by following, Calendar > All Jobs.

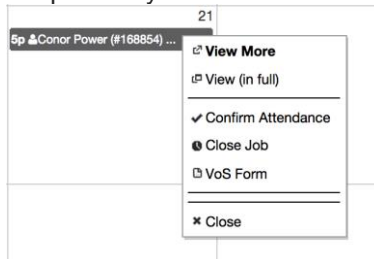
Interpreter Intelligence – 215 Evelyn Way San Francisco, CA 94127  
[www.interpreterintelligence.com](http://www.interpreterintelligence.com) - @interpreterint - 415 286 5264



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Hovering over your assigned job will provide you with details for the assignment.



Click on the Assigned job to invoke the Action Menu.

- *View More*: Invokes a popup window that contains a summary of the job details.
- *View (in Full)*: View the complete job Details, Incidentals, Verification of Service and Miscellaneous Documents.



## AZ Freelance Interpreting Services

Job #168854 -

Status: Assigned

Customer Name: St. Marys Medical Center

Booking Date: 10/09/14 3:13 PM

### Service Location

Location for Service: Outpatients Department, 111 Stryan Street, San Francisco, CA 94118

Site Contact:

Interpretation Type: Face to Face

Place of Booking:

Booking Details: Appt. is for a minor.

### Job Details

Job Details:

Language: Spanish ([spa](#))

Gender: n/a

Job Timezone: America/Los\_Angeles

Expected Start Date: 10/21/14 5:00 PM

Expected End Date: 10/21/14 6:00 PM

Expected Duration: 1 hours

### Interpreter Details

Interpreter: Sonja Garcia

Interpreter: Sonja Garcia

Date Assigned: 11/04/14 7:46 AM

Job Notes:

### Booking References

Appointment Type Pediatric Exam

- **Confirm Attendance:** Confirm that you will cover the interpreter request.
- **Close Job:** This is option you select to enter your onsite job details and upload VoS, if applicable.
- **VoS Form:** Provides a preview of the Verification Form to be printed. When a job is Closed, you will see the Uploaded VoS Form

### Close Job

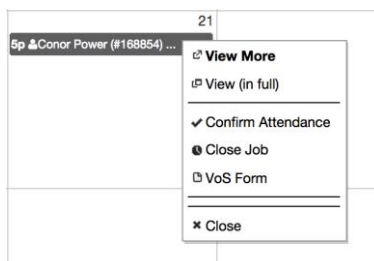
Once the interpreting assignment has been completed, the Actual Start and End time needs to be submitted for invoicing and payment.

- Click on the job on the Calendar or select the Action Icon on the Past Jobs- To Be Closed, and click on *Close Job*.



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- Modify the Start Time if needed, and enter the Actual End Time for the interpreting assignment.
- A Method of Verification may be required to Close Job. There are two ways to provide verification.
  - Upload Completed Verification of Service Form. You can browse your documents to select the VoS Form, and then Upload it directly to the job.
  - Paperwork to be Submitted Offline

- *Incidentals* tab will allow you to enter the expenses that they agency has agreed to reimburse you, such as mileage or parking.

- After you have submitted all the required information, click on the blue *Close Job* button on the Booking Details tab.



## AZ Freelance Interpreting Services


### Verification of Service

The Verification of Service (VoS) form is the form that is typically brought by an interpreter to the scheduled booking, which contains information about the job and will be signed by a customer representative after the booking has been completed to signify the actual start and end times for the booking.

The VoS can be viewed at any time, as well as Print, Save as PDF, or Share via Web. Prior to the completion of the interpreting assignment the form can be printed with the blank areas to be filled in at the time of assignment. The completed VoS form will be shown once the job has closed and the form has been uploaded.

Click on the job on the Dashboard calendar or select the Action Icon for the job to be closed, and click on *VoS Form*

► Print  
► Save as PDF  
► Share via Web

 generic logo  
company

Interpreter must return a copy of this form signed by the on-site client contact to the Demo Agency in order to be compensated.  
Please contact the your booking coordinator at  
[agency.user@interpreterintelligence.com](mailto:agency.user@interpreterintelligence.com) or 1-415-216-6677 should you have any questions.

**Assignment Information: St. Mary's Medical Center**  
Date of Assignment: 08/07/14 Booking #: 135601  
Interpreter: Pawel Jedraszewski  
Customer Reference: N/A Job/Case/Patient Name: David Jones

Verification of Service

close

When you select *View in Full*, the VoS can be viewed under the *Verification of Service* tab.



## AZ Freelance Interpreting Services

[Job Details](#) [Feedback](#) [Verification of Service](#) [Audit History](#)

### Verification of Service Form

Click on the link below to view the Verification of Service form. The VoS form must be printed, signed as indicated on the form. Once signed, the form must be uploaded into the system before a job can be processed.

You can print the form after clicking on the link or download it as a PDF to get an electronic copy

[Verification of Service Form](#)

Alternatively an electronic signature can be captured when the job is closed which serves the same purposes as the verification of service form.

Electronic Signature

### Miscellaneous Files

Select file to upload

No file selected...

[Browse](#)

Description

Enter a short description of the file being uploaded

Select the type of file

[Choose a File Type]

[Upload File](#)

[vos-scanned.pdf \(1865 Kb, application/pdf\) \(Verification of Service \(Signed\)\)](#)

[Actions](#)

## View Receivables

The Receivable menu will allow you to review the payments that have been created by the agency. This table will include historical invoices that have been generated.



Sonja M Garcia Payments

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Fax: 1 (888) 123-1234  
Email: sales@demoagency.com

| Payments |             |            |       |        |       |      |       |          |
|----------|-------------|------------|-------|--------|-------|------|-------|----------|
|          | Period. St. | Period End | # Job | Status | Serv. | Exp. | Total | Ad. Tot. |
|          | 10/01/14    | 10/31/14   | 3     |        | 180   | 15   | 195   |          |
|          |             | 10/30/14   | 2     |        | 120   | 0    | 120   |          |
|          |             | 09/30/14   | 2     |        | 120   | 27   | 147   |          |
|          |             | 09/01/14   | 2     |        | 120   | 40   | 137.5 |          |
|          |             | 08/23/14   | 1     |        | 60    | 0    | 60    |          |
|          | 07/31/14    | 08/21/14   | 1     |        | 60    | 6    | 66    |          |

Selecting the orange action icon on the row of the invoice, click on **View** to preview that actual invoice that will show each job and all incidentals.





## AZ Freelance Interpreting Services

- [Print](#)
- [Save as PDF](#)
- [Share via Web](#)



404 Bryant Street,  
San Francisco,  
CA 94127

### Interpreter Remittance

| Remittance Date | Remittance # |
|-----------------|--------------|
| 10/30/14        | 30680        |

#### Remit To

Sonja M Garcia  
555 Clayton Street,  
San Francisco,  
CA 94117

#### Phone #

#### E-mail

support@interpreterintelligence.com

#### Company EIN

200384139

#### Interpreter Tax ID

| Ref.   | Description  | Quantity | Unit Price | Line Total |
|--------|--|----------|------------|------------|
| 160050 | <b>Interpretation:</b> 10/06/14 3:30 PM - 5:45 PM<br>Spanish (spa)<br><b>Requested By:</b> John Doe (123 456 789) [Director]<br>3:00 hrs / Standard (Ref #160050)<br><b>Customer:</b> St. Marys Medical Center<br>St. John's Ward<br><b>Appointment Type:</b> Pediatric<br><b>Appointment Ref:</b> 678543<br><b>Patient Name:</b> Conor Power<br><b>HRN:</b> **321 | 3        | \$20.00    | \$60.00    |
| 160050 | Mileage (min mileage :\$15.00)   | 37.5     | \$0.40     | \$15.00    |

[View Payment](#)

[close](#)



## AZ Freelance Interpreting Services

### Reports

The Reports tab is usage that is generated based upon the job requests that you have filled to provide you more visibility. When generating reports, you can type in your dates in the Period Starting/Period Ending boxes, or select one of the pre-populated date ranges. All reports can be exported.

Review usage by number of Hours, Income, Daily Jobs and Customer.

