Interpreter Instructions

Contents

Overview	2
Login	2
Forget your password?	2
Reset Your Password	2
User Profile	4
Personal Information	4
Changing your address	4
Financial Information	5
Employment	6
Update a Qualification	7
Availability	10
Standard Availability	11
Out of Office	11
Configuration	12
Audit History	12
Dashboard	12
Offered Jobs	13
Messages and Alerts	14
Today's Job Diary	15
Past Jobs – To be Closed	16
Unconfirmed Jobs	19
How To	19
Accepting or Declining Offered Orders from the Dashboard	19
Accepting Offers	19
Declining Offers	20
Returning Jobs	21
Closing Jobs from the Past Jobs screen	21
Information about Closed Jobs	23
Receivables	24
Reports	24
New Terms	25
Links	25

Overview

We are excited to be working with you! Below, we have put together some information and links on how to use the Access Dynamic Interpreting Portal! Please feel free to reach out to us at interpreting@dynamiclanguage.com with any questions that you may have.

The Access Dynamic Interpreting Portal can be reached at the following link:

URL: https://interpreting.dynamiclanguage.com



Login

Once you go to the URL, please enter the email address that we sent this document to. Your initial password will also be the same email address.

Once you log in for the first time, you will be prompted to change your password. You will need to use something secure. We suggest choosing a password that has:

- At least 8 characters—the more characters, the better.
- A mixture of both uppercase and lowercase letters.
- A mixture of letters and numbers.
- Inclusion of at least one special character, e.g., @ #?
 - Note: do not use < or > in your password, as both can cause problems in Web browsers.

After your password is reset, please feel free to click the "Remember me" box on your next login

Forget your password?

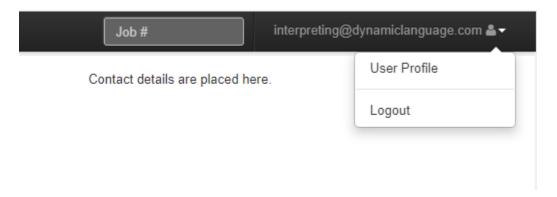
If you happen to forget your password, you can click the "Recover it here" link on the right side of the login screen



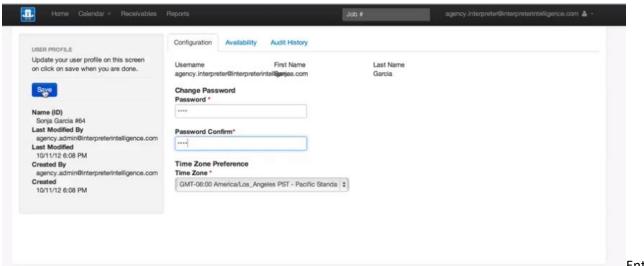
Reset Your Password

Once you are logged into the portal, you will automatically be taken to the Dashboard.

Select User Profile in the top right corner.



This will take you to the User Profile Page and Configuration Tab



Enter your new

password in the Password Field and enter it again in the Password Confirm Field.

Be aware that they MUST match exactly.

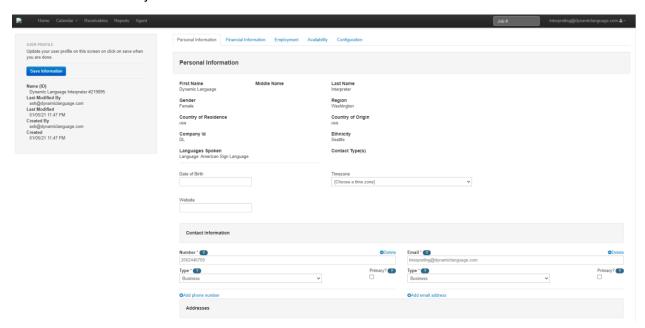
As always, Click the Blue Save Button on the left and refresh your screen.

User Profile

You will have access to your personal information in the User Profile.

Personal Information

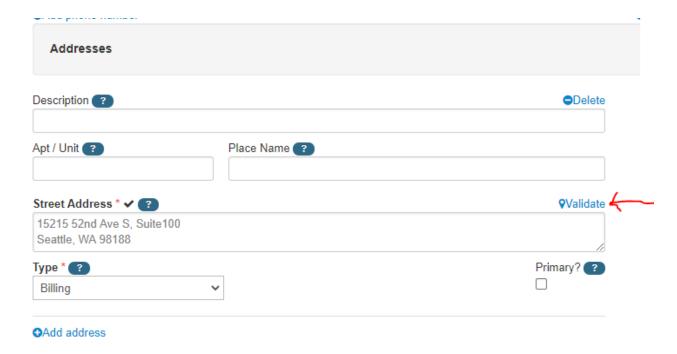
This is where your personal information is housed. There are several things that Dynamic Language has chosen not to collect because it does not impact your abilities as an interpreter. If you speak a dialect of a language that does impact your skills, we will enter it. For example - Mexican Spanish is different from EU Spanish just like Côte d'Ivoire French is different from Canadian French. We do like to have dialect information, but your ethnicity is none of our business because it does not impact your skill. Neither does age, sexual orientation, or marital/parental status. We do ask about gender because we do a lot of medical and outreach jobs. Sometimes it DOES matter.



You have the update your own contact information. Simply update the old information and click the Blue "Save Information" button on the left. Refresh your screen and it is done.

Changing your address

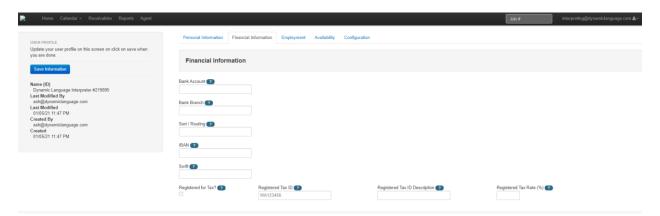
When you update your address, the system MUST be able to recognize it. After you have updated to your new address, click the Validate link before you save.



If the system cannot validate your address, please fix the formatting. If you are still having trouble, please email us at interpreting@dynamiclanguage.com for assistance.

Financial Information

This is where your banking information is housed. To set up or adjust ACH information, you must fill out the appropriate information here AND you must email accounting@dynamiclanguage.com to notify the accounting team of the change. They may ask you for additional information, but you MUST NOTIFY THEM!

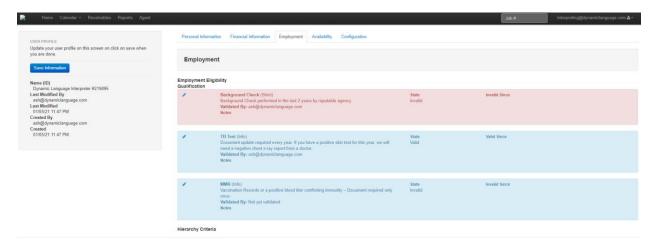


Your UBI/Business License Number is listed in the Registered Tax ID Field. Please update it if it changes. For UBI/Business License Number changes, you do not need to notify us. We will periodically check on your UBI/Business License Number. If it is missing, expired, or otherwise invalid; we will immediately deactivate your profile. We only partner with other businesses, and businesses have valid business licenses.

Employment

Though it is not visible in your portal, your Classification is CONTRACTOR. You are not an employee of Dynamic Language. The heading of this category is misleading. We apologize for any inconvenience.

Under the Employment tab you have Qualifications listed below. You can edit them and upload your new documents. We will no longer accept any documents by fax, email, or physical mail for these qualifications.



BE AWARE!! Some of our clients have a member of their upper management who audit our files to make sure that we are only offering their jobs to interpreters who have specific requirements. The requirement that you are most familiar with is probably the flu shot. Because some of this information is covered by HIPAA, please feel free to Password Encrypt your PDFs. The password should be the last 4 digits of your phone number. That will allow you and the Dynamic Language team access, but not to our clients.

Since we are not able to provide training, <u>here</u> is a link from Adobe explaining how to use their Password Protect function.

The system is set up to give you notification by email when a qualification/certification is going to expire so that you will have time to get it updated. However, once they do expire, you will see a red box in the top left of your dashboard.



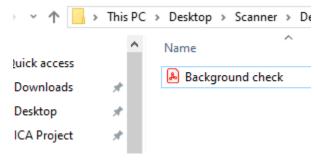
Update a Qualification.

You can see that one of the qualifications is red. That is because it is out of date AND it is blocking some orders.



To update this:

• Get your background check ready. Password protect it if you like.

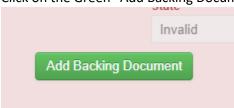


• Click on the blue pencil on the top left of the Invalid Qualification.

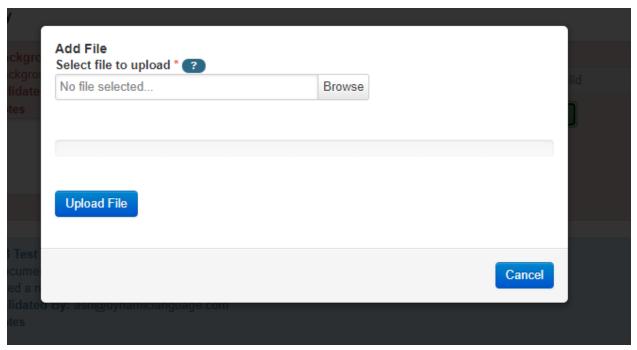
Qualification



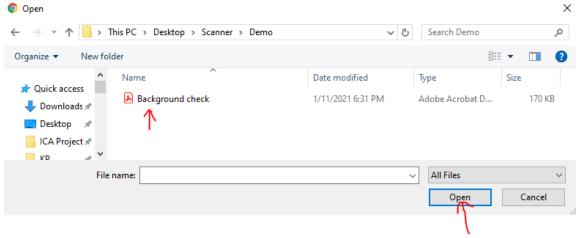
- Add any notes that you would like to put in in the notes field.
- Click on the Green "Add Backing Document" Button



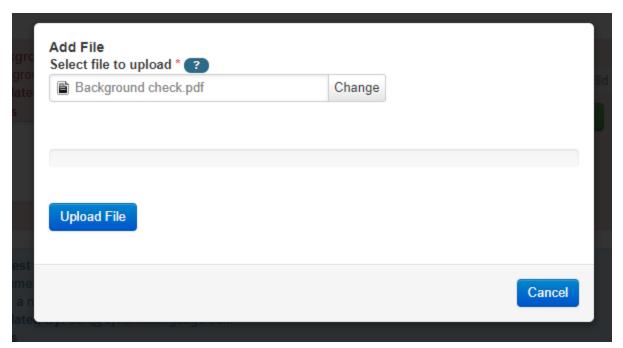
• This will bring up a new window.



- Click the "Browse" button
- Navigate to where your Background Check file is on your computer.
- Either double click on the file or single click and then click the "Open" Button



• You will see the name of the file and instead of "Browse" the button now says "Change". If this is the file you want to upload, click the Blue "Upload File" Button. If not, click the "Change" button and select the correct file.



- You can see that the file has been uploaded to the qualification.
- CLICK THE SMALL DISK ICON IN THE TOP CORNER OF THE RED BOX!! IF YOU DO NOT CLICK THIS,
 IT WILL NOT SAVE.



- Send an email to certs@dynamiclanguage.com to notify us that the document is uploaded. We will verify it so that it can be made valid again.
- You may also notice that there is an action button in the bottom left now. If you click on it, you will see options to:
 - View You can open the document to view the information. Remember, if it is password protected, you will need to enter the password to view it.



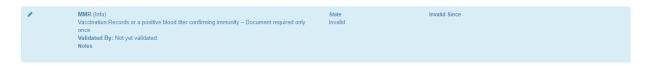
- Download This will let you download your own copy of the document. Once the new tab opens, just click the down arrow in the top right corner. This will let you download a copy of the document.
 - The downloaded document will have a password if you put it on before you uploaded it, so be sure you use the last 4 digits of your phone number so that it is easy for you to remember.



O Delete – If you need to remove the document for any reason, you can delete it here.

Remember to click the Blue Save Button on the Left and refresh the page any time you change anything!!

There is also an expired Qualification in blue.



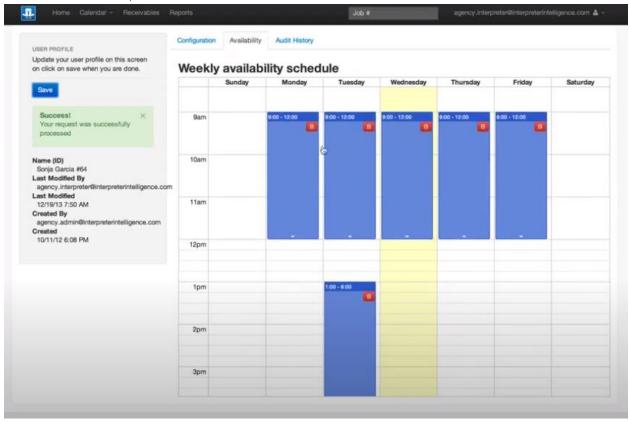
This is because not all clients require all qualifications. There is no block associated with this one, so it did not turn red. It will still need to be updated, and the process is the same.

Availability

To set your availability, you will need to go to the User Profile and click on the Availability Tab.

• Click <u>here</u> for instructions on how to get to the User Profile

Standard Availability



This calendar represents when you are NORMALLY available each week.

To set your availability, click on start time and drag to the stop time.

The blue sections are the times that you are available to accept orders

If you are available for parts of the day, you can make multiple blocks. In the example above, this person is available Monday – Friday from 9:00 AM until 12:00 PM and 1:00 PM until 6:00 PM on Tuesdays.

Remember to Save and Refresh!

To extend your existing availability, click the bottom of the blue box and drag to the new end time that you are available.

If you are no longer available on a specific day of the week, click the red trash icon in the specific block of time to delete it.

Click Save and Refresh the page!!

Out of Office

If you are out of office and would not like to receive notifications, please check the Out of office checkbox. When you get back, simply log in and uncheck it.

Configuration

In the Configuration Tab, you can also set or adjust your time zone as well as set a new password. Click <u>here</u> for instructions on setting a new password.

Remember to Save and Refresh once you adjust it!

Audit History

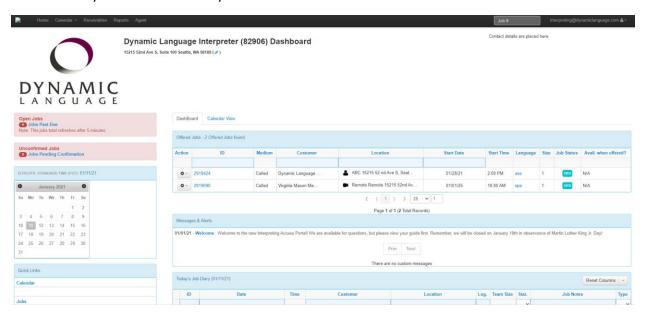
To view your profile history, you will need to go to the User Profile and click on the Audit History Tab.

• Click <u>here</u> for instructions on how to get to the User Profile

This is a list of every change made to your profile and when it happened.

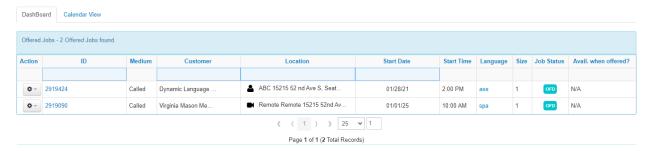
Dashboard

This is where you can find most of your relevant info.



Offered Jobs

The first set of boxes will show you the jobs that you have been offered but have not responded to yet.



A red notice box can also be found in the top left corner.

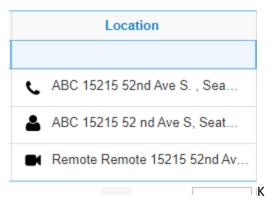


In this example, the interpreter has been offered 2 jobs that have not been responded to. You can tell that the interpreter has not responded because the Job Status is the Teal OFD symbol for Offered



The information across the field is as follows:

- ID This is the job number ALWAYS refer to this number when contacting Dynamic Language with questions. We process hundreds of requests a day and do not know which job you are asking about without the job number.
- Medium This is the way that Dynamic Reached out to you. At this time, this field may say Called even if DL did not call you. That is the only way for us to open the orders for you without emailing every single person for every single order. We are working on this.
- Customer This is the customer. If you hover your mouse over the name of the customer, you will be able to see the full name.
- Type Icon This tells you what type of job it is. As you can see from the picture below, the first order is for a phone visit. The second order is in person. And the third order is for video appointment.



• To go to instructions for accepting or declining orders from the dashboard view, click here

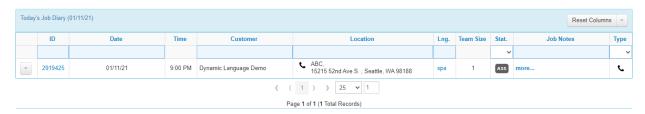
Messages and Alerts

We may post important messages here for you. The information here is not permanent and will be removed after a pre-determined amount of time. This is where you can see upcoming closures and other information that we feel is important for you to know.

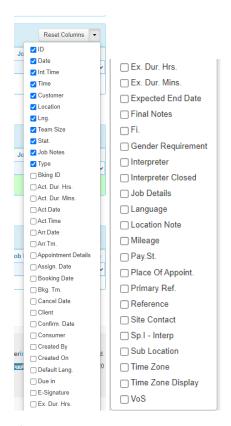


Today's Job Diary

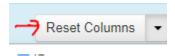
This is a listing of all the jobs that you have accepted and are assigned to you.



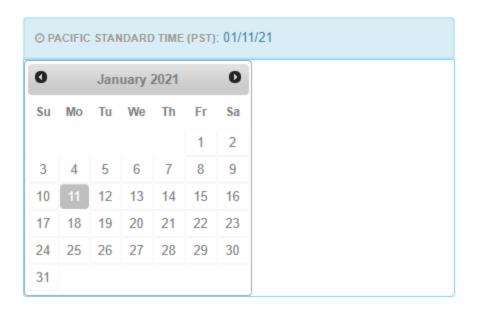
There is a down arrow next to the Reset Column Button on the right side of the page. This will allow you to change what information you see in the Diary. It is a long list, and you may find some things more useful than others.



If you ever want to go back to the original layout, just click the Reset Columns Button.



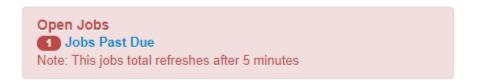
If you would like to see the Job Diary for a different date, you only need to click on that date on the calendar on the left.



Past Jobs – To be Closed

These are jobs that are already past. You must close your jobs. This includes times, form upload, parking, mileage, etc. There are two places to easily see Jobs in need of closing.

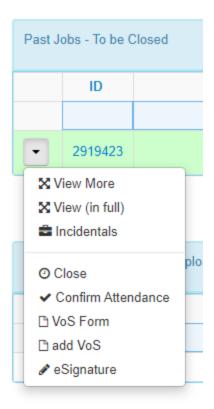
There is a red box on the top left of the Dashboard. The number here is the number of jobs that need to be closed. This box will refresh every 5 minutes.



There is also a listing of Past Jobs that need to be closed on the main Dashboard.



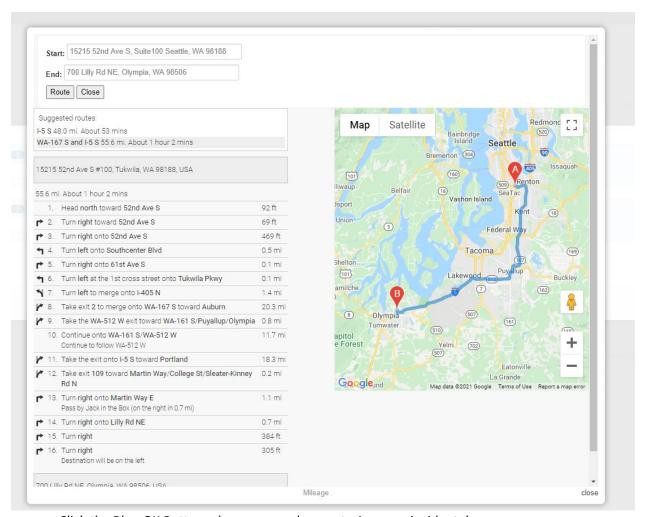
• To close a job from the Dashboard, click on the down arrow next to the job that you want to close. There are several options available to you:



- View More brings up the details and notes for this job.
- View (in full) brings up ALL the details of the job along with the comments and documents on the right side of the screen.
- Incidentals This allows you to enter your parking and miles. The clients have not changed their payment structures, but this is one of the places you can enter them.



- Click the "Add Incidental" Button
- Select the Incidental you would like to claim. Remember that not all clients will pay all claims.
- Enter the miles or dollars.
- O CLICK THE SMALL SAVE ICON TO THE RIGHT OF **EACH** ENTRY
- o If you need to calculate the mileage, click "Get Mileage" at the top. The system will calculate it for you. You can even select which route you took.



- Click the Blue OK Button when you are done entering your incidentals.
- Close This will allow you to close the job and get it ready for payment. For full instructions click here.
- Confirm Attendance This is unnecessary for the way Dynamic has the system set up.
- VoS Form This is the new voucher form that is available to you. You are welcome to use the old form as well.
- Add VoS This will allow you to upload a file to the job (e.g., your voucher). If you need
 assistance, this upload works exactly like the one here.
- eSignature On a mobile device, this will allow you to collect a digital signature for a completely paperless order. On a desktop computer, it does nothing.

Unconfirmed Jobs

No action is needed. Dynamic Language confirms the orders with the clients. Once an order is confirmed, the status will change from the Grey ASS Symbol for Assigned to the Green CON Symbol for Confirmed.



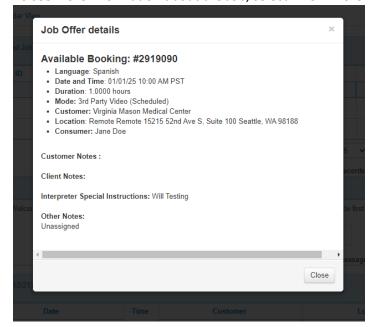
How To

Accepting or Declining Offered Orders from the Dashboard

Accepting Offers



- Select the Offer that you would like to accept.
- Click on the Gear Button to the left of that Job.
- To see more information about the Job, select "View More."

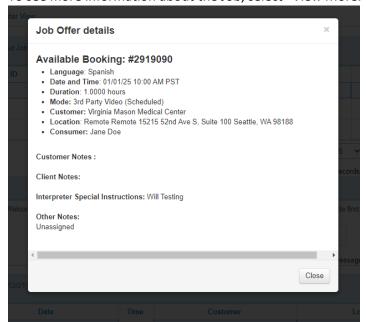


- If the details look good, and you wish to accept the order, Click on the Gear Button to the left of that Job.
- Select Accept Offer.
- The Job Status will change from the Teal OFD symbol for Offered into the Grey ASS
 Symbol for Assigned .

Declining Offers



- Select the Offer that you would like to decline.
- Click on the Gear Button to the left of that Job.
- To see more information about the Job, select "View More."



- If the details look good, and you wish to decline the order, Click on the Gear Button to the left of that Job.
- Select Decline Offer.
- The Job Status will change from the Teal OFD symbol for Offered into the Purple OPE

 Symbol for Open . This shows that you have declined YOUR offer. Please note that the

scheduling team may offer Jobs to more than one interpreter at a time. The first interpreter to accept the Job gets it.

Returning Jobs

The functionality to return Jobs in the portal is still being worked on. During the transition, we will ONLY be accepting givebacks via email to interpreting@dynamiclanguage.com. We will not be accepting givebacks via phone call.

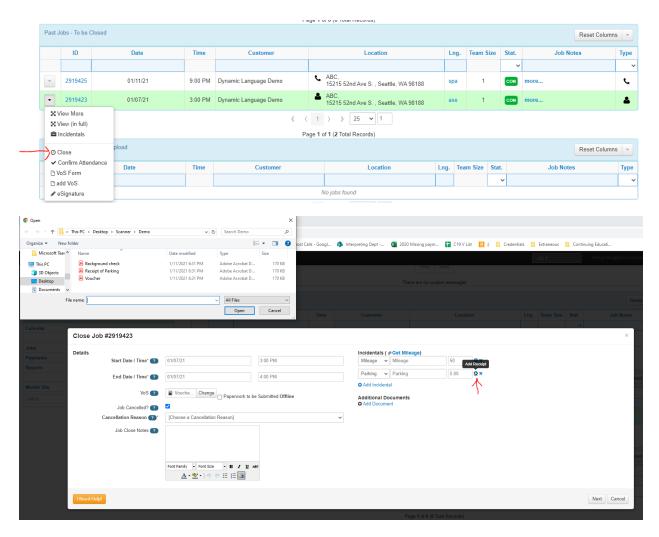
The giveback email will be processed on the business day that we receive it. If you send it on a Wednesday at 2:00p, it will be received the same day. If you send it on Friday at 5:31p, it will be processed as of the following Monday. If there is a holiday on that Monday and the office is closed, it will not be processed until Tuesday. Please keep this in mind when you are giving back jobs.

- Any givebacks by the interpreter within 1 Business Day of any appointment (not including holidays or weekends) will result in a \$30 Late Giveback Fee unless Dynamic is able to find another interpreter to fill the order. These fees may be waived if documentation of an emergency is provided.
- No Shows will result in a \$30 no show fee. These fees may be waived if documentation of an emergency is provided.
- Cancellations by the client within 24 hours of any appointment (not including holidays or weekends) will result in a billable minimum of 1 hour for in person appointments and 30 minutes for phone appointments. Some orders will have other specific minimums, be they will never be less than 1 hour for in person appointments and 30 minutes for phone appointments. These payables may be waived if Dynamic Language has declared an emergency. An example of this is snow. If it is dangerous to be on the roads, Dynamic may waive the fees and payments.
- Consumer No Shows will result in a billable minimum of 1 hour for in person appointments and 30 minutes for phone appointments. Some orders will have other specific minimums, be they will never be less than 1 hour for in person appointments and 30 minutes for phone appointments. These payables may be waived if Dynamic Language has declared an emergency. An example of this is snow. If it is dangerous to be on the roads, Dynamic may waive the fees and payments.

Closing Jobs from the Past Jobs screen

Beginning on February 1, 2021, we will no longer accept vouchers by email, fax, or physical mail. You MUST upload the voucher through the portal to get paid.

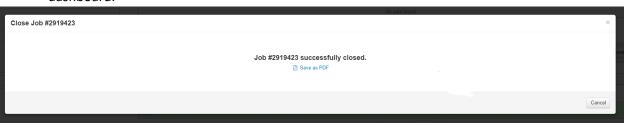
- Select the Job that you would like to close for processing.
- Click on the down arrow to the left of that Job.
- Click Close



- Update the start and end times.
- VoS is where you will upload your voucher. Vouchers in this software are called Verification of Service (VoS). If you need assistance, this upload works exactly like the one here.
- Job Cancelled? If the Job was cancelled or a consumer did not show up check this box
 - o Choose the cancellation reason that best fits the reason for the cancellation.
 - o If there is anything you need us to know, you can put it in the Job Notes.
- Incidentals This is the best place to enter your incidentals It works the same was as above,
 EXCEPT you can click on the + icon to the right of the incidental to upload a file, like a photo or scan of the parking receipt.
- Additional Documents If you have any additional documents, you can enter them here.
- Click the "Next" Button



- This is an estimate of the payment. Please read it carefully. THIS is the information that you are submitting for payment. The team will not be able to change it once it is submitted.
 - If you see a mistake, click the "Previous" Button on the bottom right to go back and make corrections.
 - o If everything looks correct, click the Blue "Confirm & Close" Button on the bottom right.
 - If you need to start again, click the "Cancel" Button at the bottom right to go back to the dashboard.



- You will receive a confirmation popup.
 - o If you would like a PDF version of the order, click the Blue "Save as PDF" link.
 - o If you are done, click Cancel or the small X in the top right.

Information about Closed Jobs

If you need to see the information again before it is processed by Dynamic, you can see them here:

Dashboard > Quick Links > Jobs > Tabular View > Arrow next to job > View in Full > Assignments



Receivables

Receivables Page – This is a list of payments that Dynamic Language has processed. We are currently processing out of the old system. Once we begin processing payments in the new system, your payments will populate here.

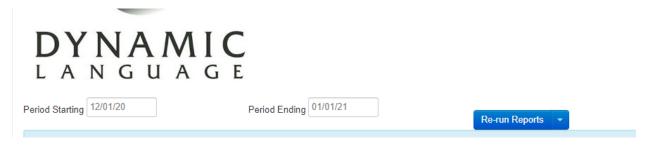
Details for each entry are under orange icon. Select View

Shows the Remittance for that check and all the details.

Reports

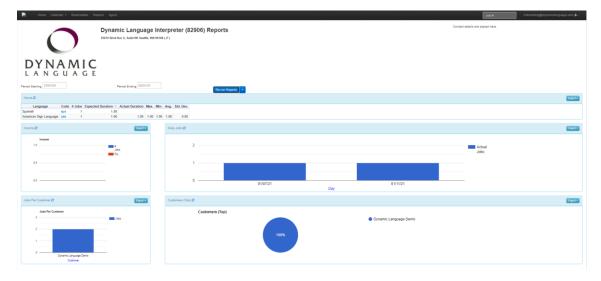
In this new system, you will have access to high level reporting. As the orders are processed, they will automatically populate here.

Previous month is shown by default but can be adjusted by selecting new dates in the period Starting and Period Ending Fields. Click the Blue "Re-run Reports" button each time you enter new dates.



Choose re-run reports.

All the data is broken down by language, hours, income, daily jobs, customer, and jobs per customer.



New Terms

- <u>Booking</u> This is a group of jobs that are all for the same person or customer. Like a student's classes for the semester. There will be multiple jobs for the same booking.
- <u>Client</u> This is the physical building that the Job is being requested in. Like the name of a clinic. Of
 course, not remote appointments. Those are remote. An example of a client is the Lindeman
 Pavilion or the Tacoma Specialty Center.
- <u>Consumer</u> This is the person needing the interpreting. They are the one consuming your words.
- Customer This is the client
- <u>Job</u> This is an appointment. It is what you will normally use.
- <u>Location</u> This is the office or department that the Job is being requested in. Of course, not remote appointments. Those are remote. An example of a client is Cardiology or Room 103
- <u>Verification of Service (VoS)</u> This is your voucher or invoice. It is a form that is uploaded as proof of the time and completion of a Job.

Links

Overview - https://www.youtube.com/watch?v=80liSN1Ampg

Availability - https://www.youtube.com/watch?v=lElDoQWe1i8

Booking Statuses - https://www.youtube.com/watch?v=BxftRIULyys

Closing Jobs - https://www.youtube.com/watch?v=7mZvSGrIs4Y

Mobile Application Overview - https://www.youtube.com/watch?v=IXYoZiUlod4

Confirming Job via Mobile App - https://www.youtube.com/watch?v=lvAYo9SY4rU

Closing Job via Mobile App:

https://www.youtube.com/watch?v=sBtadX4nFNI https://youtu.be/hd9gX88PN0M