

Team Jobs & Interpreter Shifts

Team **Jobs** allow you to create **Jobs** with multiple interpreters assigned to a **Job** and with **Interpreter** Shifts you can further split a **Job** duration into individual **Interpreter** shifts, including overlapping shifts to allow for handover between **Interpreters**. This may be a requirement in the case of a particularly long assignment or where different requirements are needed within the appointment such as medical or legal certification. Note that you can create Team **Jobs** without **Interpreter** Shifts but for the purpose of this user guide we will describe both features on a single **Job**.

Creating this type of **Job** starts out like any other:

- From any screen in II, you can click the blue **Create New Booking** button from the top of the screen, or
- Navigate to the **'Home'** menu and select **'Create New'** under the **'Bookings'** section or
- **'Create New'** under the **'Jobs'** section
- Select the **Client**, or **Customer** and then **Client**, and the **Requestor**
- Choose the **Service Location**
- In the **Appointment Details** section select the **Language** and the **Service Type** plus any additional **References** or **Requirements** if relevant
- Under **# Interpreters Requested** you can then specify the team requirements, anything more than 1 will indicate that this is a team **Job**. Maximum # of interpreters is 50.
- Select the **Consumer** from the drop down menu and in this example we will assume that the **Consumer** will also have a family member attend so we are going to add an additional **Consumer** by clicking on the **Add More Consumers** link

The screenshot shows the 'Appointment Details' form. Key elements include:

- Language:** Spanish
- Service Type:** Face to Face
- # Interpreters Requested:** 2 (highlighted with a red circle and a callout box stating 'Any # above 1 determines a team job')
- Preferred Interpreter:** Type or select an interpreter
- Consumer:** Juan Rodriguez
- Date of Birth:** (empty)
- Notes:** (empty)
- Comments:** (empty)
- Additional Consumers:** (empty) with a link 'Add More Consumers' (circled in red) and a callout box 'Click this link to add more consumers'
- Interpreter Gender Required:** [Select Gender]
- Additional References:** Patients Name: 012
- Appointment Details:** (empty)

- Start typing/select an additional **Consumer** and as always you can edit/create a new consumer on-the-fly using the edit/pencil icon; once you have selected an additional consumer you can select more or click **Close** to return to the booking form

Booking #: Additional Consumers

Primary Consumer: Juan Rodriguez

Add more consumers:

Additional Consumers:

- Lidia Rodriguez

Start typing and select or use the edit icon to edit an existing consumer or to create a new one on-the-fly
Select Close when complete

Close

- In the **Calendar** section populate the **Expected Start Date & Time** and the **Duration in Hours & Minutes** as normal
- To enable **Interpreter** shifts on the **Job**, tick the **Use Interpreter Shifts** box
- Click the blue **Save** button as normal at the bottom of the page

Calendar

Expected Start Date* 04/06/20 Expected Start Time* 09:00

Use Interpreter Shifts* Tick this box to enable Interpreter Shifts

Duration Hours* 4 Minutes* 00

Time Zone* GMT-08:00 America/Los_Angeles PDT - Pacific Daylight Time

Booking Date* 03/06/20 Booking Time* 12:01

Notes

Job Details Billing Notes Notes about Interpreter(s)

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Save

Navigating to the **Assignments** tab of this **Job** you can see that the **Team Size** is 2 and that (in current unassigned state) both **Interpreter** slots are open

Job Details Assignments Finance Notifications Recurring Audit History

Assignments

Team Size: 2

Team Id: 732511

Default Language: Spanish

Preferred Interpreter:

Expected Duration: 4 hours

Interpreters:

- Open (09:00 PDT - 13:00 PDT)
- Open (09:00 PDT - 13:00 PDT)

Notes about Interpreter(s)

Job Notes

Documents (Booking #550209)
Add Document

Documents (Job #517764)
Add Document

Save More...

You can also see that the system has created 2 individual **Jobs** under this **Booking** to represent each **Interpreter** shift/visit; this is important as each **Interpreter** will be paid separately and as different emails will need be sent to the **Interpreters** based on what shift they have been assigned to

You can now specify the shifts for each **Interpreter**:

- Type the start and end time under each **Job/Visit** (in this example we have broken the job into 2*2 hour shifts but as discussed these shifts can also overlap if preferred)
- Make sure to save each **Job/Visit** individually by selecting the drop down menu/cog wheel beside each job and clicking **Save**

Additional features on this page include the ability to add even more **Interpreters** and to **Override** any **Requirements** set on the **Booking** level (added when creating the **Job** e.g. Medical Certification) for the individual **Interpreters** by clicking the **Override Requirements** box at the bottom of any **Job/Visit**. Note that when this is enabled, a new link will appear allowing you to add an alternative **Requirement**. This may be useful when a **Job** originally required 2

Medically Certified Interpreters, for example, but the **Requirement** then changed to having one of them legally certified instead - Overriding the **Requirements** for one **Interpreter** will allow you to remove the **Booking** level Medically Certified **Requirement** and then add a Legal Certification **Requirement** for this **Interpreter** which will apply only to this **Interpreter**. As always, make sure to save any changes at the individual **Job/Visit** level on this page using the cog wheel drop down menu associated with the **Job/Visit**.

Override Requirements ?

Job #517765 (Unassigned) Service Level Agreements

Unassigned Spanish

Date Interpreter Assigned: N/A Date Interpreter Confirmed: N/A

Job Status* Invoice Status* Payment Status*

Open Invoiceable Payable

Shift Start Date* ? Shift Start Time* ?

04/06/20 11:00

Shift End Date* ? Shift End Time* ?

04/06/20 13:00

Internal Job Notes ?

Final Job Notes ?

Always save any changes using the cog wheel drop down menu

Checking this box will Override any requirements at the booking level for this Interpreter only. When this is enabled, a new 'Add Job Requirement' link will appear giving further flexibility on requirements for this Interpreter separate to the booking requirements

Override Requirements ?

Additional Job Requirements (Overrides Booking Requirements)

Add Job Requirement

Add Interpreter

Add even more interpreters to the booking

In a recent improvement to the system, the **'Service Type'** can now be changed at both **Job** level and **Visit** level. To do this at the **Visit/Team Job** level, enable the flag **'Override Service Type'** next to the appropriate **Visit** and then use the dropdown menu to select an alternative. As always, be sure to save changes at the individual **Job/Visit** level on this page using the cog wheel drop down menu associated with the **Job/Visit**.

Interpreters

Job #613551 (Unassigned) [Service Level Agreements](#)

Unassigned

Service Type: Face to Face

Override Service Type ?

Date Interpreter Assigned: N/A

Job Status* Invoice Status*

Shift Start Date* ? Shift Start Time* ?

Shift End Date* ? Shift End Time* ?

Override Requirements ?

Spanish

Face to Face

[Select Service Type]

Phone (Scheduled)

3rd Party Video (Scheduled)


Face to Face

Telephone Translation (Scheduled)

Video (Scheduled)

OPI (On Demand)

VRI (On Demand)

Internal Job Notes ? 

Final Job Notes ?

Job #613552 (Unassigned) [Service Level Agreements](#)


Unassigned

Service Type: Face to Face

Override Service Type ?

Date Interpreter Assigned: N/A

Spanish

Internal Job Notes ? 

Moving to the **Recurring** tab you will notice that both of these **Jobs** appear and you can see the relationship based on the **Team Size**, **Job Status** of each as well as the **Service Type** for each **Job/Visit**.

Home Manage Reports Accounts Admin Job # dolores_agency [All]

BRITISH SUMMER TIME (BST)

Job Details Assignments Finance Notifications **Recurring** Tasks Audit History

Documents Comments

Assign Interpreter

Job ID	Date	Duration	Status	Interpreter	Team Size	Service Type	Actions
517764	12/06/20 09:00	2 hours	UNF	Pilar Blanco (2675)	2 (#732511)	Face to Face	
517765	12/06/20 11:00	2 hours	CLS	gui asfasfd (2973)	2 (#732511)	Face to Face	

Documents (Booking #550209) Add Document

Documents (Job #517764) Add Document

Save Assignments

Navigating to the **'Manage Jobs'** page you can also see both of these **Jobs**, the different start time for each, the **Team Size** and the 2 hr duration for each **Job**. You can also see the additional **Consumer** that we added earlier when creating the **Job**.

By editing either of these **Jobs** at a later date you can take action on both by updating either the main booking, if anything changes at that level, or by updating the individual **Job/Visit** parameters on the **Assignments** tab as previously illustrated.

Jobs New Jobs Offers (>24 Hrs) Unconfirmed (>24 Hrs)

Demo Agency: All Jobs Filters
 Query Applied: expectedStartDate greater or equal to 04/06/20 AND expectedStartDate less or equal to 05/06/20
 All jobs (with current filters applied)

Bulk Actions Reset Columns

ID	Date	Time	Customer	Location	Lng.	Language	Stat.	Interpreter	Team Size	Reference	Requirement	Type	Bkg. Tm.	Consumer	Ex. Dur. Hrs.	Ex. Dur. Mins.
517764	04/06/20	09:00	San Francisco General Hospital	1001 Portero Ave, San Francisco, California	spa	Spanish	OPE	1	2	Patients Name: 001	-	Person	04:01	Juan Rodriguez / Lidia Rodriguez	2.00	120
517765	04/06/20	11:00	San Francisco General Hospital	1001 Portero Ave, San Francisco, California	spa	Spanish	OPE	1	2	Patients Name: 001	-	Person	04:01	Juan Rodriguez / Lidia Rodriguez	2.00	120

We will discuss Team **Jobs** & Interpreter Shifts in further detail when we begin looking at **Job Assignments**.