

# Offering & Assigning Jobs

By Offering **Jobs** to **Interpreters** you can determine who is available/can fulfill the job, and/or, based on **Interpreters** responses to a **Job Offer**, decide on the best option for assignment.

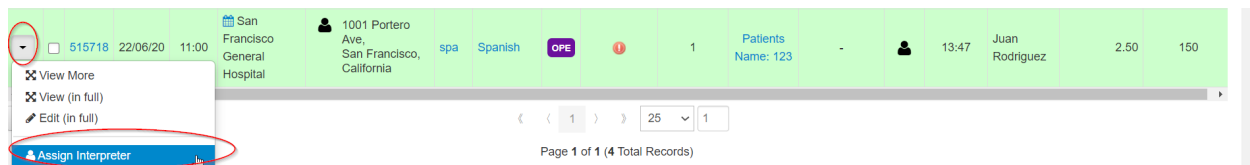
Note that an **Interpreter** can always be directly **Assigned** to a **Job**, thereby circumventing the **Offer** process, however this user guide will go through the **Offering** and subsequent **Assignment** workflow. When we speak of “eligible” **Interpreters** we refer to the list of **Interpreters** that will appear in the **Interpreter list** on the **Assign Interpreter** page according to the system/booking/job filters that are applied at the time.

Agencies can choose between 2 different options for **Job** assignment;

- **Interpreters** can be allowed to **Self-Assign Offers** within their portal, or by actioning email **Offers**, based on a first-come-first-serve system, or
- The agency can use the **Job Offer Pool** option where the system records **Interpreters'** responses to **Job Offers** but the agency will **Assign** manually as appropriate; these options will be discussed further within Configuration documents but for the purposes of this user guide we will assume we are using the **Job Offer Pool** and will **Assign Jobs** manually

## Filtering for Interpreters

Navigating to the **Manage Jobs** page using the '**Home**' menu or the '**Quick Links**' on your **Dashboard**, use the dropdown menu next to the **Job** you wish to **Offer/Assign** and select **Assign Interpreter**.



This action will take you to the default view of the **Assign Interpreter** page where you will immediately see a list of eligible **Interpreters** if any of your **Contact/Interpreter** Portfolio meet the requirements of the **Job** - note that there may be occasions where this table is blank as there are no eligible **Interpreters**.

You can also navigate to the **Assign Interpreter** page from within the job - go to the **Assignments** tab and click the **Unassigned** link on this page.

There are other tabs and features on the **Assign Interpreter** page which are very useful:

- **Preferred Interpreters** will display any that were set as **Preferred** on the **Customer** or **Consumer** profiles (note that these these will also appear in the **Interpreter list** tab but can be viewed/offered separately under the Preferred tab)

- **Interpreter Calendar** will provide a quick view of the eligible **Interpreter(s)** bookings (note that the list of default eligible **Interpreters** will only include those that are available during the scheduled time on the **Job**)
- **Map** provides a visual representation of the service location relative to **Interpreters** locations
- The **Edit Job** button and the cog wheel menu will allow you to take various actions on the **Job**
- **Job Summary (Show/Hide)** and **Booking Filters** (which includes a handy visual on the number of filters that have been added to the **Booking**) allow you to toggle various system level and/or booking and **Job** level filters to increase or reduce the list of eligible **Interpreters** presented in the table, as well as updating certain data. These are essential especially if there are no eligible **Interpreters** available by default. Let's look at these in more detail.

	miles	Ra	Cat	Lang	Name	Number	Region	Active Note	Availability	Experience	Notes	Last Closed	Rate	Margin
<input type="checkbox"/>	214.6	7	con	urd (+3)	Ali Jan(●...)	07939322333 (+1 other)	West Yorks		M-F 8-18	very experienced and professional			19.7 / 24.63 / 0	91% / 90% / 100%
<input type="checkbox"/>	225.3	1	con	bfi	Bugs Bunny(●...)	0780927366	North East, North West		24/7			23/07/21	19.7 / 24.63 / 0	91% / 90% / 100%
<input type="checkbox"/>	292.5	1	con	bfi	Hannah Testing(●...)	07511 123123	South West	RSLI		1010346			19.7 / 24.63 / 0	91% / 90% / 100%

### Job Summary (Show/Hide):

This summary will allow you to toggle certain filters to find an optimum or larger set of **Interpreters** if required, as well as editing certain information on the **Job**.

On the Left hand side you can see a summary of **Job** details such as the **Requestor**, **Language**, **Date/Duration**, **Location**, **Consumer** etc. Data with a pencil icon can be edited here.

On the right hand side are the filters that have been applied to the eligible **Interpreters** list either by system defaults or data entered on the job. These can be toggled by checking/unchecking the box next to the filter:

- **Proximity Search** can be switched off altogether thereby listing **Interpreters** regardless of their location/proximity to the **Service Location**, or you can leave this switched on but change the proximity **Radius** using the drop down menu

**Note:** for Service locations that use the '**Remote**' flag, i.e. this is not a physical address, or where the Service type is Remote (e.g. Video Scheduled, Phone Scheduled) the **Proximity Search** will automatically be disabled.

However there is a switch under Admin -> Company -> Configuration tab '**Use Proximity Search for Remote Services**' which, if switched On, will enable the **Proximity Search** for all Service Types except where the Remote flag is used on the

Service Location (see the Company & Customer Configuration document in the Admin & Configuration folder for more details).

- **Available Interpreters Only** can be switched off thereby listing **Interpreters** that have bookings assigned during all or part of the scheduled time for this **Job**
- **Consumer's, Customer's and Interpreter's Exclusions** can be switched off thereby disregarding any exclusions that were set either in the **Consumer** or **Contact/Interpreter** profiles or in **Customer Configuration**. Caution is advised here as these **Exclusions** are likely to be set for very specific reasons
- **Preferred Interpreter on Booking** can be switched off if this **Interpreter** is not available
- **Marked Unavailable or Declined Offer** setting will only be useful if you are making a second or subsequent round of offers on this job, i.e. if an **Interpreter** has already declined an offer they will no longer appear in the eligible **Interpreters** list, you can turn this switch on if you wish them to appear to **Offer** again for example
- **Mileage** flag will not update the eligible **Interpreters** list however this will update the automatic mileage calculation on the job which may be used subsequently for financing the job

As you toggle with these filters note how the list of eligible **Interpreters** will change, filters can be toggled on/off in any combination to provide the optimum list of **Interpreters** for **Job Offers**. If any data has been edited in the **Job Summary** remember to save this using the blue **Save** button at the bottom of this section.

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Job # dolores\_agency [All]

### Assign Interpreter

Job #2643430 - Current Status: Open

[Job Summary \(Show / Hide\)](#) [Edit Job](#)

**Date / Duration (expected)**  
06/09/20 5:00 PM [Calendar](#)  
2 hours

**Requestor**  
David Burke (123-123-1234) [\(Manager\)](#)

**Language**  
Spanish

**Consumer**  
Laura Jackson

**Notes**  
[Appointment Details](#)

**Location**  
AAA Insurance (test)  
Corporate Headquarters 25 Stanton Street, San Francisco, CA 94117 (PH: 123-456-7890)

**Assigned Interpreter**  
None

**Preferred Interpreter**  
Sonja M Garcia ([Jobs](#))

**Proximity Search On / Off**  
☒  
**Radius (miles)**  
50

**Available Interpreters Only**  
☒  
**Customer's Exclusions**  
☒  
**Mileage**  
☐

Automatic mileage calculation will be skipped when you enter mileage.

**Customer's Exclusions**  
☒  
**Interpreter's Exclusions**  
☒  
**Assignment's Criteria from Customer**  
☐  
**Preferred Interpreter on Booking**  
☒  
**Marked Unavailable or Declined Offer**  
☐

**Billing Notes**

**Notes about Interpreter(s)**

**Job Details**

## Booking Filters:

These filters apply to all **Jobs** within a **Booking** (unless that the **Override Requirements** setting has been used (see the document on Team Jobs & Interpreter Shifts), and these filters are likely to be quite vital, therefore care should be taken in editing these.

Note how the **Booking Filters** link has a count icon that will display at-a-glance, without expanding these filters, if any have been applied to the **Booking**. Expanding this section will show the details of any filters:

- add or remove an **Interpreter gender requirement**

➤ add/remove any **Additional Requirements**

As with the **Job** filters, note how the list of **Interpreters** will change if these booking filters are updated and of course the **Job** and **Booking** filters can be toggled in combination to find the optimum list of **Interpreters**.

The screenshot shows the 'Assign Interpreter' interface for Job #2643430. It includes a 'Booking Filter' section with a dropdown menu and a count icon (1) indicating the number of filters applied. Below this is the 'Interpreter Gender Required' dropdown. The 'Additional Requirements' section shows a list of requirements, with 'Medical' currently selected. A red trash icon is visible next to the 'Medical' requirement, and a red circle highlights the 'Add Requirement' link. Annotations explain that the count icon displays the number of filters, and that booking requirements can be removed by clicking the red trash icon or added using the 'Add Requirement' link.

If an **Interpreter** that you would expect to see does not display in the list, even when all filters have been toggled, it is likely that there is an issue with this Interpreter's **Contact** profile, for example the appropriate **Language** may not have been added or their **Availability** has been changed or perhaps the **Interpreter** is not **Active**.

Another useful feature for filtering **Interpreters** are the filters within the **Interpreter List**/table itself. You can filter by **Rating** and/or **Employment Category** (this can be useful if for example you have an exhaustive list of eligible **Interpreters** and you wish to offer only to '1' rated **Interpreters** or in the case where you wish to serve staff **Interpreters** in preference to contract or freelance interpreters), region etc. The tabular filters can be used independently or in conjunction with the **Job** and/or **Booking** filters.

Interpreter List										
<input type="checkbox"/>	Rate	Cat	Lang	Name	Number	Region	Active Note	Availability	Experience	Notes
<input type="checkbox"/>	1	con	spa	Jayne Shmaplowitz (●...)	2122558400	5 Boroughs	Working freelance since 2008. Worked as translator prior.	M-F	Mostly medical	test note
<input type="checkbox"/>	1	con	spa	Marian Blanco (●...)	(415) 283-3359	California		M-F 9 - 5		
<input type="checkbox"/>	3	con	spa	Jose Pacheco (●...)	1234567890					

You will notice also that there are several useful columns on the Interpreter List:

- **Rate** - The Standard/Premium/Platinum rate in pace for this **Interpreter** relative to this **Job**
- **Margin** - The Standard/Premium/Platinum margin in pace for this **Interpreter** relative to this **Job** and **Customer** Rates
- **Last Closed** - The date in that column will show the most recent date this particular interpreter **Closed** a **Job** on the Interpreter Portal

## Offering a job

At any point during the filtering process above you can begin sending **Offers** to **Interpreters**:

- ★ To select all of the **Interpreters** in the **Interpreter List** simply click the checkbox at the top of the list - **All Interpreters (with current filters applied)**
- ★ Or you can Select multiple **Interpreters** one-by-one

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Interpreter List Preferred Interpreters Interpreter Calendar Map Offered Audit History Comments

**Interpreter List**  
☐ All interpreters (with current filters applied)

<input type="checkbox"/>	miles	Ra	Cat	Lang	Name	Number	Region	Active Note	Availability	Experience	Notes	Last Closed	Rate	Margin
<input type="checkbox"/>	6.7	1	con	urd (+5)	Abbas Omaar( )	07714741804		Working as interpreter for 10 years	Monday to Friday 8:30am to 18:30pm	Has interpreting skills	The quick brown fox jumped over the fence. The dog barked loudly. Go now, h...		50 / 60 / 65	23% / 14% / 19%
<input type="checkbox"/>	46.2	1	fte	ase (+7)	Adam Driver( )	707-217-7750						03/09/22	45 / 50 / 55	31% / 29% / 31%
<input type="checkbox"/>	2434.0	1	con	spa	Andry Melendez( )	000-000-9999		No fee					45 / 50 / 55	31% / 29% / 31%
<input type="checkbox"/>	4.4	1	fte	t-m (+1)	Angela Essex( )	408 993 4422	California	NEXT DAY GUARANTEE	M-F 7am to 4pm		767 Buena Vista Avenue San Francisco, CA 94117	04/18/22	45 / 50 / 55	31% / 29% / 31%
<input type="checkbox"/>	5.5	1	fte	fra (+2)	Conor Power( )	415-216 6677						05/31/22	45 / 50 / 55	31% / 29% / 31%
<input type="checkbox"/>	4.4	1	con	hun (+1)	fred rogers( )	(323) 999 - 1234						11/30/21	45 / 50 / 55	31% / 29% / 31%
<input type="checkbox"/>	47.9	1	fte	spa (+1)	Ger Interpreter( )	654654564546							45 / 50 / 55	31% / 29% / 31%

☐ Mark Unavailable
 ☐ Offer by Email
 ☐ Offer by SMS
 ☐ Called
 ☐ Voice Message Left

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- ★ Then click on the appropriate buttons at the bottom of the page:
  - **offer by email**
  - **offer by SMS** (if enabled for your agency)
- ★ Alternatively you can select these actions for individual Interpreters using the drop down menu next to an **Interpreter**
- ★ After selecting the **Offer** action, you can specify additional information in the **Offer email/sms**. **NOTE:** The message field has a 256 character limit, including blank spaces. If exceeded, the offer will not be sent. The same is true for the Subject Prefix field.
- ★ Note also that you can send the Offer to the Interpreters(s) without sending a Notification by clicking 'Do Not Send Notification?', i.e. the Interpreter will see the Offer in their Interpreter Portal but will not receive any other message such as an sms or an email. On the **Offered** tab, there will be no timestamp in the **Last Notified** column indicating that the actual notification message was not sent
- ★ Selecting the '**Allow Double Booking?**' flag will mean that the **Interpreter** can Accept the **Offer** even if they have an existing booking at the same time. Interpreters will not get a double-booking warning for back-to-back jobs unless the **Double-Booking Buffer (Minutes)** is set to 1 minute (Admin menu > Customer menu > Configuration tab). The double-booking message indicates that the **Interpreter** cannot accept the **Offer** due to a booking conflict and must contact the agency to indicate availability. The **Allow Dbl. Bk.?** column on the **Offered** tab will indicate if this was flagged or not
- ★ Click the blue **Notify Interpreters** button when you have taken all appropriate actions in the **Offer** box

Offer Interpreters

Please enter any additional text you would like in the email (this will appear prior to the booking details)

Subject Prefix (Optional)  
e.g. ATTN:

Specify a different address for replies:

Specify an address to Cc:

Allow Double Booking?

Do Not Send Notification?

Contacts to be emailed

- Hannah Testing (10285): hannaht@testing.com
- Wendy Testing (10284): wendytesting@testing.com
- Bugs Bunny (6278): bug@looneytunes.com
- Ali Jan (3116): test@mail.com

Notify Interpreters

Close

Note that the standard **Offer** Email and SMS **Templates** can be configured under the ‘**Admin**’ menu and ‘**Templates**’ and this will be covered in further detail in a separate document.

You can view all **Offer** emails/sms on the job in the **Notifications** tab of the job itself.

This offer process can be repeated for additional **Interpreters** now or at any time provided the **Job** has not been **Assigned** - for example you may want to offer a job to **Interpreters** in batches based on certain filters. You will notice also that there are additional buttons at the bottom of this page such as the ability to **Mark Unavailable** and also to record that an **Interpreter(s)** was **Called** and/or a **Voice Message Left**.

As soon as any offers have been made on this job you will notice that the **Job Status** changes to **Offered**. Navigating to the **Offered** tab you will now see a list of **Offers** for this **Job** and any responses received in the **Offer Accepted** and **Offer Declined** columns. The values here will default to ‘**No**’ until a response is received - **Interpreters** can respond by clicking on the **Accept** or **Decline** buttons in the **Offer** email or by logging into their portal and taking appropriate actions within the **Jobs Offered** section on their **Dashboard**.

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Job #

dolores\_agency

Assign Interpreter

Job #3416902 - Current Status: Offered

Edit Job

Job Summary (Show / Hide)

Booking Filters (0 Filters)

Interpreter List

Preferred Interpreters

Interpreter Calendar

Map

Offered

Audit History

Comments

Action	Interpreter	Accepted	Accepted	Last notified	Note	Medium	Declined	Declined	Active?	Allow Dbl. Bk.?	Avail. when offered?	Interpreter Notes	Rate	Margin
<input type="checkbox"/>	Thomas Dylan (83219)	No		07/26/21 4:00 PM	Offer by Email		No		Yes	No	Yes	Has Special Licensure	40 / 50 / 60	47% / 38% / 33%
<input type="checkbox"/>	Venkatesh Sivaraman (12199)	No		07/26/21 4:00 PM	Offer by Email		No		Yes	No	Yes		30 / 40 / 40	60% / 50% / 56%
<input type="checkbox"/>	Sonja M Garcia (2538)	No		07/26/21 4:00 PM	Offer by Email		Yes	07/27/21 12:43 AM	No	No	Yes	Interpreter's Phone Number - test	35 / 45 / 55	53% / 44% / 39%
<input type="checkbox"/>	John Interpreter (64886)	No		07/26/21 4:00 PM	Offer by Email		No		Yes	No	Yes		45 / 50 / 55	40% / 38% / 39%
<input type="checkbox"/>	F2F only (78298)	No		07/26/21 4:00 PM	Offer by Email		No		Yes	No	Yes		45 / 50 / 55	40% / 38% / 39%

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**Quick tip:** On the **Manage Jobs** page, using the **Reset Columns** button you can add columns **First Offer** and **Last Offer**, these will provide a visual of when a **Job** was originally **Offered**, and if there were subsequent offers, the last date of **Offer**.

**Note:** if an interpreter declines an **Offer**, the offer will still be visible on the interpreter portal and will be marked that it has been declined. The **offer** will show on the portal until another **Interpreter** is assigned. If an **Interpreter** is later able to accept the **Job** they had declined, they will be able to do so. **Interpreters** can also filter **Offers** on their portal by the Declined status if they wish to see new/active **Offers** only that they have not yet responded to. More information is available for **Interpreters** on the Interpreter Portal user guide.

## Assigning a job

When you are ready to **Assign** the job based on **Interpreter** responses, there are a number of ways to do this:

- From the **Offered** tab within the **Assign Interpreter** page which we just looked at above, click on the cog wheel drop down menu next to the **Interpreter** and select **Assign** or
- From the **Interpreter List** tab, click on the drop down menu and select **Assign** or
- From **Manage Jobs**, click on the drop down menu next to the relevant **Job**, select **Assign Interpreter**, this will take you to the **Assign Interpreter** page as above where these **Assign** options can then be carried out
- From the **Dashboard**, click on the **Unassigned jobs** quick link, click on the drop down menu next to the relevant **Job**, select **Assign Interpreter** and this will take you to the **Assignments page** as above where these **Assign** options can then be carried out
- From within a **Job**, navigate to the **Recurring** tab, start typing the **Interpreter** name in the **Interpreter** box and select and click the button **Save Assignments**. Note that this option does not check that the **Interpreter** selected is eligible (i.e. Available etc.) so caution should be used to check this in advance, however, this option is particularly efficient especially when assigning multiple recurring **Jobs** at one time (note the **Copy to open slots** action).

Otherwise, when assigning a **Job** that is part of a recurring or related set you will receive a pop-up box that gives you a number of different assignment options. Make a selection and then click **Assign**.



## Recurring Job Assignment



**Job #2643430 (Recurring Job #1908175)**

This job is part of a recurring booking. Please specify how you'd like handle the interpreter assignment:

- ☒ Assign interpreter to **this job only**
- ☐ Assign interpreter to **this job and all future unassigned** jobs in this recurring booking
- ☐ Assign interpreter to **this job and all unassigned** jobs (past, present and future) in this recurring booking

☐ Ignore conflict arising from interpreter double booking as a result of this assignment.

Cancel

Assign

You will notice that the **Job Status** will now have changed to **Assigned** and as always you can check the **Notifications** tab on the job and you will see the corresponding communication i.e. the **Customer** and the **Interpreter** will receive a **Booking Confirmation** email (depending on how you have configured your system for Confirmations, see below).

## Offering & Assigning Team Jobs and Interpreter Shifts

Finally let's take a look at assigning team **Jobs** and/or interpreter shifts. The process is exactly the same except that you will need to repeat the **Offer** and **Assign** process individually for the number of **Jobs/Visits** under the **Booking**.

Open a team **Job** and move to the **Assignments** tab. This will display a summary of the number of **Jobs/Visits** followed by an individual section for each time slot and **Interpreter** Assignment. To **Offer** and **Assign** simply click on the **Unassigned** link for the relevant **Job/Visit** and carry out the **Offer** and **Assign** process as per the steps in the **Offering a Job** and **Assigning a Job** sections of this document.

When this has been completed for one of the **Visits**, navigate back to the **Assignments** tab and repeat the process for the remaining **Visit(s)** within the **Booking**. As always, you can repeat the **Offer** process for additional **Interpreters** prior to the individual **Visits** being assigned.

Note that the list of eligible **Interpreters** on the **Assignment** page for the individual **Visits** may differ as the time slots, requirements etc. may differ.



**Documents**

Save More ... +

**Booking #550209 / Job # 517764**  
 Spanish: 04/06/20 09:00  
**Customer**  
 San Francisco General Hospital  
**Status**  
 Open **OPE**  
**Last Modified By**  
 dolores\_agency  
**Last Modified**  
 03/06/20 12:10  
**Created By**  
 dolores\_agency  
**Created**  
 03/06/20 12:10  
**Interpreter**  
 N/A

**Interpreters:**

- Open (09:00 PDT - 11:00 PDT)
- Open (11:00 PDT - 13:00 PDT)

**Interpreters**

Job #517764 (Unassigned) Service Level Agreements

**Unassigned** Spanish

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

**Job Status\*** Open **Invoice Status\*** Invoiceable **Payment Status\*** Payable

**Shift Start Date\*** 04/06/20 **Shift Start Time\*** 09:00

**Shift End Date\*** 04/06/20 **Shift End Time\*** 11:00

Override Requirements ?

**Internal Job Notes** ?

**Final Job Notes** ?

Job #517765 (Unassigned) Service Level Agreements

**Unassigned** Spanish

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

**Internal Job Notes** ?

**Final Job Notes** ?

Assignments tab for team jobs/interpreter shifts will display a summary of the slots followed by the individual Interpreter jobs. Click on the Unassigned link for each job to navigate to the Assignments page where each job can be offered and/or assigned

When all of the **Visits** have been **Assigned** under the **Booking** you can then see both a summary of the **Assignments** and details for each job on the **Assignments** tab. You can use the cog wheel next to the individual jobs to make any further changes such as **Unassign Interpreter**, sending ad hoc notifications, **Cancel** etc.

**Documents**

Save More ... +

**Booking #550209 / Job # 517764**  
 Spanish: 12/06/20 09:00  
**Customer**  
 San Francisco General Hospital  
**Status**  
 Assigned **ASS**  
**Last Modified By**  
 dolores\_agency  
**Last Modified**  
 11/06/20 10:51  
**Created By**  
 dolores\_agency  
**Created**  
 03/06/20 12:10  
**Interpreter**  
 Pilar Blanco (2675)

**Interpreters:**

- Pilar Blanco (09:00 PDT - 11:00 PDT)
- gui asfasfd (11:00 PDT - 13:00 PDT)

**Interpreters**

Job #517764 (Pilar Blanco (2675)) Service Level Agreements

**Pilar Blanco (2675)** Spanish

Interpreter Phone: 085654520

Date Interpreter Assigned: 11/06/20 10:50 Date Interpreter Confirmed: 11/06/20 10:50

**Job Status\*** Assigned **Invoice Status\*** Invoiceable **Payment Status\*** Payable

**Shift Start Date\*** 12/06/20 **Shift Start Time\*** 09:00

**Shift End Date\*** 12/06/20 **Shift End Time\*** 11:00

Override Requirements ?

**Internal Job Notes** ?

**Final Job Notes** ?

Job #517765 (gui asfasfd (2973)) Service Level Agreements

**gui asfasfd (2973)** Spanish

Interpreter Phone: 086666549

**Internal Job Notes** ?

**Final Job Notes** ?

Navigating to the **Notification** tab, you can select the individual **Jobs/Visits** to see the communications that have been sent for each, for example **Offers to Interpreters** and **Confirmations to the Interpreter and Customer**.

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Job Details Assignments Finance Notifications Recurring Audit History

Documents Comments

JOBS DETAILS

Customer

Location

Details

Calendar

Notes

Interpreter Job #517764

Interpreter Job #517765

**Important Booking Update [Ref #: 517764]**  
**[12/06/20 09:00 PDT] - Demo Agency**

**Notification Date**  
 11/06/20 10:51  
**Recipient**

Documents (Booking #550209)  
 Add Document

Documents (Job #517764)  
 Add Document

As **Jobs** move through the workflow of **Open** to **Offered** and **Assigned**, you will notice these changes in both the **Manage Jobs** page and the **Dashboard**, for example **Open & Offered** jobs will appear in the **Unassigned Jobs Quick Links** on the **Dashboard**, while the other tabs on this page will display more refined views such as **Open/New** only, or **Offers (>24 hrs)** and **Unconfirmed (>24hrs)**. Similarly, **Open & Offered** jobs can be actioned via the **Scheduler** tool under the '**Home**' menu which you may find very efficient once you are familiar with the process of **Offering** and **Assigning Jobs**.

## Confirming Jobs

An optional final step in the Workflow of a **Job** prior to **Closure** is the **Confirmed** status. This is sometimes used by agencies where they require **Interpreters** to **Confirm** a **Job** after it has been **Assigned**. Or the agency may wish to use the **Confirmed** status internally as a final check on the scheduling of a **Job**.

By default the system will send a **Booking Confirmation** notification to relevant parties when a **Job** has been **Assigned**, however, if you wish to add the **Confirmation** step to your workflow, the system can be configured to only send **Booking Confirmations** when a job has been **Confirmed**; similarly you can send automated Booking Confirmation Reminders to **Interpreters** if the **Job Confirmation** is a required step by them. This configuration will be covered in further detail in the Configuration training documents.

## Bulk Confirmation

If Jobs are being **Confirmed** by your agency, this can also be done in bulk, for example, you may wish to **Confirm** all **Jobs** under a single **Booking** (recurring Jobs) at once, or **Confirming** all **Jobs** for the following day.

- Go to the '**Home**' menu and select '**Manage Jobs**'
- Apply a date filter if required using the **Filter** button - you can manually enter a date range or you can select one of the predefined date ranges or use the date range choosers and then **Close** the dialog
- You can further refine the data in the grid/table by using any dropdown menus in the column headers or typing a value as appropriate
- Use the **Reset Columns** button to add/remove columns from the grid, for example the **Bking ID** if you wish to **Confirm** all **Jobs** under a specific **Booking**
- Use the tick box at the top of the grid to select all Jobs - note that by default 25 Jobs will be shown per page, if you need to select more than that you must first expand the number of records per page using the dropdown menu at the very bottom of the page prior to selecting the all Jobs box
- Using the **Bulk Actions** dropdown menu, select **Confirm Jobs**

Home

Manage

Reports

Accounts

Admin

Job #

dolores\_agency

generic logo

company

Demo Agency Jobs

Create New Booking

Create New Contact

Create New Customer

Create New Consumer

Jobs

New Jobs

Offers (>24 Hrs)

Unconfirmed (>24 Hrs)

Demo Agency: All Jobs

Filters

Query Applied: AND expectedStartDate greater or equal to 18/02/20 AND expectedEndDate less or equal to 26/01/21

All jobs (with current filters applied)

Bulk Actions

Reset Columns

	ID	Date	Time	Customer	Location	Lng.	Language	Stat.	Interpreter	Team Size	Type	Bking ID	Cmts
<input type="checkbox"/>								As:					
<input type="checkbox"/>	505890	18/03/20	11:30	Department of Foreign Affairs	Main Building, Cavan Road, Virginia, Co. Cavan	spa	Spanish	ASS	D Interpreter 1 (20600) (656545) ( )	1		540692	0
<input type="checkbox"/>	505838	19/03/20	10:00	TED Medical Centre	17 headfort park, virginia, co. cavan	spa	Spanish	ASS	D Interpreter 1 (20600) (656545) ( )	1	Patients Name: Ward 1	540645	0
<input type="checkbox"/>	546492	28/09/20	09:00	TED Medical Centre	17 headfort park, virginia, co. cavan	spa	Spanish	ASS	Raymond de Groot (20815) (4156919863) ( )	1	Patients Name: High (+3 other)	574084	0
<input type="checkbox"/>	546512	28/09/20	14:00	TED Medical Centre	17 headfort park, virginia, co. cavan	spa	Spanish	ASS	D Interpreter 1 (20600) (656545) ( )	1	Patients Name: Medium (+3 other)	574089	0
<input checked="" type="checkbox"/>	582800	28/12/20	11:30	TED Medical Centre	17 headfort park, virginia, co. cavan	bfi	British Sign Language	ASS	Ali Jan (3116) (07939322333) ( )	1		602863	0

Export

25

10

25

50

100

250

500

1000

Page 1 of 2 (30 Total)

Demo Agency Support

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→ You will receive a pop up dialog summarising the **Confirm** action, select **Confirm Jobs** to proceed

## Confirm Bulk Confirm Jobs

Please confirm you would like to bulk confirm the selected jobs.

Only jobs in the **Assigned** status can be confirmed in this way. All jobs not in the assigned status will be skipped.

You have selected **25** jobs to confirm.

The jobs will be confirmed using your current default configuration for confirmation: e.g. notification email is enabled, single email per job versus digest.

**This action cannot be undone.**

Confirm Jobs

Cancel

If you wish to send Confirmation emails only, but not update Job status to Confirmed, you can use the **Bulk Actions** dropdown menu and select **Send Email Confirmations**.

You will receive a pop up dialog allowing you to select **Interpreter** and/or **Customer Confirmations**, and click the **Send** button.

# Send Confirmations



You have selected **25** jobs to send confirmation emails for.

Send Interpreter Confirmations **?**

☐

Send Customer Confirmations **?**

☐

Group by Consumer **?**

☐

Send

Cancel