

Closing or Cancelling Jobs

Closing Jobs

When the service has been completed a **Job** can be **Closed**.

Many agencies will allow **Interpreters** to complete **Job** closures either at the appointment or afterwards and the **Interpreter** may need to upload some verification paperwork, this is called a Verification of Service (VoS) in II and this, along with the Interpreter Portal will be covered in detail in other documentation.

In some cases agencies may close **Jobs** internally and this is the process we will cover in this document.

Navigate to the '**Manage Jobs**' page using the '**Home**' menu or the '**Quick Links**' on your **Dashboard**. Firstly, you may want to filter for a date range and/or for **Jobs** in **Assigned/Confirmed Status**. You can also filter for a specific **Job#** in the **ID** column or using the **Job#** Search in the menu bar.

Select the dropdown arrow next to the relevant job and select **Close**.

The screenshot shows the 'Manage Jobs' interface. At the top, there are navigation menus: Home, Manage, Reports, Accounts, and Admin. A search bar for 'Job #' is on the right, and the user is logged in as 'dolores_agency'. Below the navigation, there are tabs for 'Jobs', 'New Jobs', 'Offers (>24 Hrs)', and 'Unconfirmed (>24 Hrs)'. The main content area displays a table of jobs with columns: ID, Date, Time, Customer, Location, Lng., Language, Stat., Interpreter, Team Size, Reference, Requirement, Type, Bkg. Tm., Consumer, Ex. Dur. Hrs., and Ex. Dur. Mins. A filter bar is visible above the table, showing a query: 'Query Applied: expectedStartDate greater or equal to 01/05/20 AND expectedStartDate less or equal to 01/06/20'. A dropdown menu is open for the job with ID 515429, showing options: Start Video, View More, View (in full), Edit (in full), Assign Interpreter, Unassign Interpreter, View Offers, Open / Re-Open Job, Confirm Interpreter, Confirm w/ Requestor, Send Ad Hoc Email, Send New Job Email, Send Job Status Update Email, Send Customer Confirmation, Send Interpreter Confirmation, Send Ad Hoc SMS, Resend Confirmation SMS, Resend Reminder SMS, Price Quote, Incidentals, and Close. The 'Close' option is circled in red. A blue callout box points to the filter bar with the text: 'Use the filter function to select a date range and/or the advanced filter for specific jobs. Can also use the tabular filters.'

ID	Date	Time	Customer	Location	Lng.	Language	Stat.	Interpreter	Team Size	Reference	Requirement	Type	Bkg. Tm.	Consumer	Ex. Dur. Hrs.	Ex. Dur. Mins.
515429	22/05/20	10:00	Marys Medical Center	6 Portmarnock Drive., Portmarnock, Co. Dublin, Ireland	fra	French	ASS	Pilar Bianco (2675) (085654520)	1	Patients Name: mmmm	-		01:48		0.50	30

On the **Close Job** dialog box:

- Update the **Start & End Date/Time** if required (these will default to the scheduled time)
- Add the **VoS** document if you have enabled this option
- Insert **Job Close Notes** if relevant
- Add **Incidentals**
 - if adding mileage as an **Incidental** you can click the **Get Mileage** link and this will provide a google maps calculation of the mileage which can then be input on the mileage **Incidental**
 - mileage payments will be calculated based on your mileage rates as set in the corresponding **Rate Plan** which will be covered in Financial documents
 - to add receipts for **Incidentals** simply click on the **+** icon next to the **Incidental** line item
 - if you need to remove an **Incidental** from this job, click the **x** icon next to the line item
 - note that the items that appear in the **Incidentals** drop down can be configured for your agency and this will be covered in more detail in another document
- Add any **Additional Documents** relating to the **Job**
- Click the **Next** button and you will receive a job closure success message

Once a **Job** has been **Closed** it is then complete from a bookings perspective and is then ready to be Financed which we will discuss in Financial documents.

Close Job #517764 x

Details

Start Date / Time* ? 12/06/20 09:00

End Date / Time* ? 12/06/20 11:00

VoS ? No file selected... Browse Paperwork to be Submitted

Offline

Job Close Notes ?

Incidentals ([Get Mileage](#))
[+ Add Incidental](#)

Additional Documents
[+ Add Document](#)

Start & End Date/Time will be prepopulated with the scheduled time but can be updated to reflect the actual start/end time. Add the VoS if you are using this option, or select to add this at a later time.

Add any incidentals such as mileage, parking etc. Add any other relevant documentation and click 'Next'

[I Need Help!](#) Next Cancel

Cancelling Jobs

If a **Job** does not take place for whatever reason it can be **Cancelled**.

As above, if **Interpreters** have permissions to **Close Jobs** they can also be configured to allow **Cancellations** but for now we will **Cancel** a **Job** from an agency perspective.

Just like **Closing a Job**, navigate to the **'Manage Jobs'** page using the **'Home'** menu or the **'Quick Links'** on your **Dashboard**. Firstly, you may want to filter for a date range and/or for **Jobs in Assigned/Confirmed Status**. You can also filter for a specific **Job#** in the **ID** column or using the **Job# Search** in the menu bar.

Select the dropdown arrow next to the relevant **Job** and select **Cancel**.

On the **Cancel Job** dialog box:

- Choose a **Cancellation Reason** - these must be configured according to your agency's preferences and you can set the **Billable** and **Payable** defaults in order to apply any cancellation fees/payments when financing the job - this is covered in the Admin & Configuration documents

- Choose to add any **Notes** relevant to the Cancellation
Note you can also set some default Notes for Internal Cancellations, e.g. you may wish for the user Cancelling the Job to fill in some specific information regarding the Cancellation.

Go to **Admin -> Company -> Configuration tab -> Configuration: Closing Configuration** -> Enter the desired text in the **Cancellation Text** box and then use the blue **Save** button on the left hand side - this text will appear by default in the Cancellation Notes field by default but for Internal users only.

- Choose to disable **Cancellation** notifications for this job using the check box provided if required
- Click **Cancel Booking** to confirm

The screenshot shows the 'Cancel Booking' dialog box. At the top, it says 'Please select the reason for the cancellation in this field: * ?'. Below this is a dropdown menu with 'Normal cancellation' selected. A red circle highlights the dropdown menu. To the right of the dropdown is a text area labeled 'Cancellation in this field:'. Below the dropdown are two dropdown menus for 'Billable * ?' and 'Payable * ?', both set to 'Yes'. A red circle highlights the 'Billable' dropdown. Below these are two checkboxes: 'Do NOT send cancellation email ?' (unchecked) and 'Do NOT send cancellation email ?' (checked). A blue box with arrows pointing to the dropdowns and checkboxes contains the text: 'Choose a cancellation reason from the drop down menu. Based on the cancellation reason the Billable & Payable fields will auto populate. You can choose to disable Cancellation emails for this job. Click 'Cancel Booking' to confirm.' At the bottom right are two buttons: 'Cancel Booking' (blue) and 'Close' (grey).

Cancellation Notification

When the agency cancels a job, the **Customer** and, if assigned, the Interpreter will receive **Cancellation** notification via email. If the **Customer** cancels an unassigned job, the cancel notification is sent to the customer, but not sent to the agency email address.

Assigned jobs canceled by **Customer** triggers the **Cancellation** email to both **Customer** and **Interpreter**.

Unfulfilled Jobs

Another final stage that may be required on jobs is where the job could not be fulfilled, for example an **Interpreter** could not be sourced for the requirements of the **Job**.

Unfulfilled Jobs will default to not **Billable** and **Payable** therefore it is a useful feature when it comes to financing **Jobs**, it may also be a useful feature for reporting purposes.

As above for **Closing** or **Cancelling** a **Job**, navigate to the '**Manage Jobs**' page using the '**Home**' menu or the '**Quick Links**' on your **Dashboard**. Firstly, you may want to filter for a date range and/or for **Jobs** in **Assigned/Confirmed Status**. You can also filter for a specific **Job#** in the **ID** column or using the **Job#** Search in the menu bar.

Select the dropdown arrow next to the relevant **Job** and select **Can't Fulfill**. On the **Can't Fulfill Job** dialog box:

- Choose an **Unfulfilled Reason** - these must be configured according to your agency's preferences in Company Configuration to be covered in a separate document
- Choose to disable **Can't fulfill** notifications for this job using the check box provided if required
- Click **Can't Fulfill Job** to confirm

Can't Fulfill Job



Please select the reason for the visit being unfulfilled in this field: * ?

[Choose an Unfulfilled Reason] v

[Choose an Unfulfilled Reason]

Rare Language

Distance

Disabling the booking in this field:

Choose an unfulfilled reason from the drop down menu.
You can choose to disable Can't fulfill emails for this job.
Click 'Can't Fulfill Job' to confirm.

Do NOT send can't fulfill email ?

Can't Fulfill Job

Close

Navigating back to 'Manage Jobs' you can see how the **Status** and colour coding for each of these **Jobs** has changed.

Home Manage Reports Accounts Admin Job # dolores_agency

Create New Booking Create New Contact Create New Customer Create New Consumer

generic logo company Demo Agency Jobs

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

Demo Agency: All Jobs Filters
Query Applied: expectedStartDate greater or equal to 01/06/20 AND expectedStartDate less or equal to 15/06/20 AND
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. M
518501	05/06/20	14:00	TED Medical Centre	17 headfort park, virginia, co. cavan	spa	Spanish	CLS	D Interpreter 1 (20600) (656545) (e...)	1	Patients Name: 001	-	Person	15:10	Lidia Rodriguez	1.00	60
518468	11/06/20	14:00	Courtyards.org	Rechtbank AVB, Amstelveen, Ouderkerkerlaan 50	pol	Polish	GAN	Piotr Kaliski (3517) (078975216426) (e...)	1	Patients Name: wdg	-	Person	14:42	Lidia Rodriguez	2.25	135
517764	12/06/20	09:00	San Francisco General Hospital	1001 Portero Ave, San Francisco, California	spa	Spanish	UNF	Pilar Blanco (2675) (085654520) (e...)	2	Patients Name: 001	-	Person	04:01	Juan Rodriguez / Lidia Rodriguez	2.00	120

