

Configuring Reference Fields by Service Type

Reference fields may be configured at the Company- or Customer-level; be flagged as required or left optional; and may be configured by Service Type.

For any service, references can be configured to collect information at the time of the on-demand request or Job creation, or to be collected at closing or end of a call by the interpreter.

Information can be collected prior to On-Demand Video and On-Demand Voice calls by configuring references for those services. The selected references will then appear on the **Requestor Intake Form**. This functionality will appear on the portal and the mobile application.

Video Remote Request ×

Please select the language below, confirm the details and click on 'Request' to start a video remote interpretation session.

Type or select a language × ▼

AA Medical Care × ▼

Doc office 1 × ▼

15 minutes ⬆ ⬇ ⬆

Please fill in the following form before requesting the call

Type of appointment




Patient name *

Request Cancel

NOTE: By default, only References set up since this product release will automatically appear on the On-Demand Intake form. You may manually select those previously defined References you wish to appear.

CONFIGURING REFERENCE FIELDS

- To enable/disable a Reference, select the edit icon to the right of the Reference (Admin>Company>Configuration, scroll down to your References).

Reference Label * ? Meeting Type	Required ? <input checked="" type="checkbox"/>	Disabled ? <input type="checkbox"/>	Help Text ? <input type="text"/>	...	
Reference Label * ? Type of appointment	Required ? <input type="checkbox"/>	Disabled ? <input type="checkbox"/>	Help Text ? <input type="text"/>	...	
Reference Label * ? MSRN	Required ? <input type="checkbox"/>	Disabled ? <input type="checkbox"/>	Help Text ? <input type="text"/>	...	

- You may choose to mark the Reference as “Required;” a red asterisk will appear next to that Reference on the form. You may also leave the field optional to the Requestor.
- Select the **Services** tab on the Configuration page to choose OPI (On Demand) and/or VRI (On Demand). You may also check the Enable All Services box if this reference applies to all services for your agency.

Edit Reference Field Configuration ×

Details **Services**

Services

Enable All Services? ?

Services ?

OPI (On Demand)
Telephone Translation (Scheduled)
Face to Face
Message Relay
Phone (Scheduled)
e-Appointment

VRI (On Demand)
Video (Scheduled)
3rd Party Phone (Scheduled)
3rd Party Video (Scheduled)
Remote Simultaneous
Translation
Post-Production
CART

**To select both service types:
On a PC, hold down the CTRL button and click both.
On a Mac, hold down the Command button.**

Close

- For any newly created References, **Enable all Services** will be flagged by default, therefore those References should be configured as appropriate (for example, switching “off” for a service type that does not require it).