Creating an Interpreter (Contact)

We will now create an Interpreter, referred to as a **Contact** within Boostlingo ii.

To create a Contact:

- Click on the Green **Create New Contact** button on the top right-hand side of the Dashboard, or
- Navigate to the **'Manage'** Menu and select **'Create New'** from the 'Contacts' section. [1]

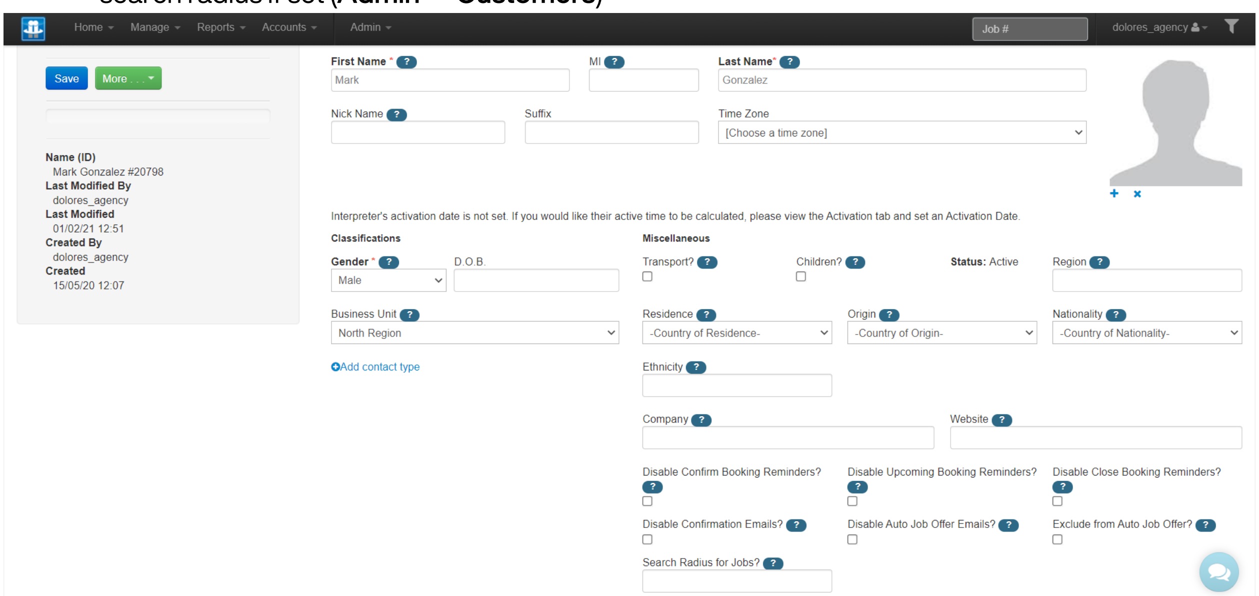
Under the **General Information** tab:

➔ Populate the Contact's **First** and **Last name**[2] and **Gender** [3]

➔ You can enter other details such as **Country of Residence**, **Origin** and **Nationality** - this additional info can prove useful when managing or reporting on your **Contact** portfolio

➔ You can also control/modify the email communication to this **Contact**; by default they will receive all relevant communication from ii such as job offers, assignments, updates, confirmations, reminders etc., however by checking any of these boxes you can disable certain emails only for this specific interpreter for example Confirmation reminders

➔ Using the **Search Radius for Jobs** field you can specify a radius in miles/Km that this **Interpreter** is willing to travel. This will override the Company search radius (**Admin** -> **Company** -> **Configuration**) or a Customer search radius if set (**Admin** -> **Customers**)



➔ You can then add as many **Languages** as appropriate for the **Contact**. Please note that the source language

[1] If you have more than 100 profiles to set up, you may benefit from importing profile data in bulk. For details on how to import Customer, Contact, or Requestor profiles in bulk, please contact us at support@interpreterintelligence.com

[2] If you plan to integrate with QuickBooks, for both Customer and Contact profiles, either the Name or the Accounting Reference field value must match the QuickBooks name for Customer or Vendor.

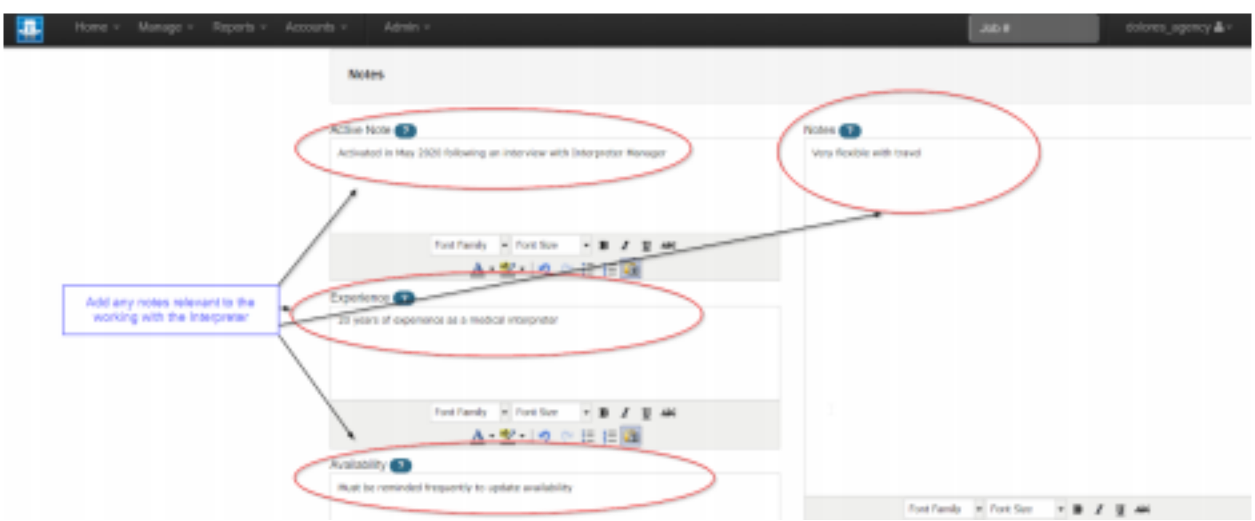
[3] You may leave Gender blank; however this will result in the interpreter not being included in gender-specific searches

for all jobs is assumed to be English, and you do not need to add that to the **Contact** profile or to jobs.

- Click on **Add Language** and start typing, ii will immediately perform a lookup on the language database and you can select from the results. (If a required language is not available, Navigate to the '**Admin'** menu > '**Languages'**, click on **Add Language** and start typing the required language in the 2nd row and save the selection. If a required language is not available in this list, please contact Boostlingo ii, and this can be added to your database.)
- Select a **Rating** for the interpreter's proficiency in the selected language. Note that you can use this rating for any parameters required by your agency, e.g. to rate interpreters that you wish to serve first, second etc. on job offers.
- Repeat this process for any additional languages that the **Contact** can provide

➔ In **Contact Information** add at least one phone number and email address as well as a physical address - this is important as ii will perform a **Proximity Search** on jobs to filter eligible **Contacts** for job offers.

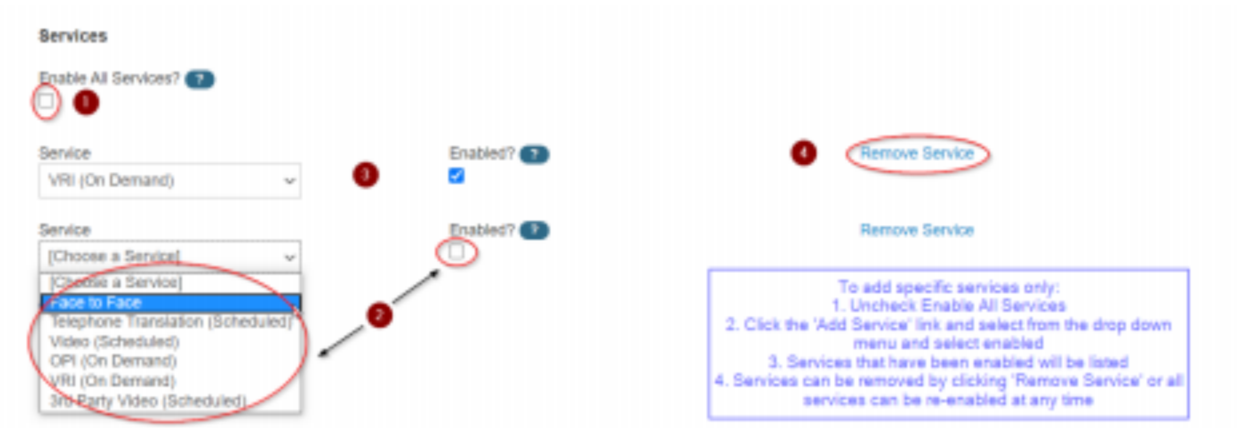
➔ Add any **Notes** relevant to working with the **Contact** - these notes will only be visible to agency users and not to **Customers** or the Interpreter. As you can see there are a few categories of notes such as when the interpreter began working/ became **Active**, their **Experience** and **Availability**



→ In the **'Financials'** section you may add bank account details etc., however, note that these are for your records only, ii does not process any financial transactions.

Moving to the **Services** tab, **Service** types define the medium of the service or how the job is carried out, e.g. Face to Face, Video, Telephone etc. By default, new **Contacts** will be enabled for all services that have been set up for your agency, however you can refine/restrict services at the **Contact** level:

→ Uncheck the **Enable All Services** box
→ Select **Add Service**
→ Choose the appropriate service from the drop-down menu and check the **Enabled** box.
→ Repeat this process to enable any additional services
→ Click the blue **Save** button on the left-hand side to save these changes
→ If service types change for the **Contact** into the future, you can simply uncheck the **Enabled** box or click **Remove Service** and **Save** the changes



Within the **Employment Status & Eligibility** tab:

→ **Employment category** is the nature of the Interpreter's contract with you for e.g. Employee (full time) and you must select a value here
→ **Automated Assignment** is not currently used, please select Contractor
→ **Employment Eligibility** & **Qualifications** must be setup by an Admin before these can be attached to an Interpreter therefore these settings will be covered in a separate Configuration document.

On the **Miscellaneous** tab you can add any files/paperwork relevant to the **Contact**.

The following file types will be visible to **Customers** on their portal who have been granted the Compliance Auditor privileges:

- VoS
- Misc
- Report
- Image
- Receipt

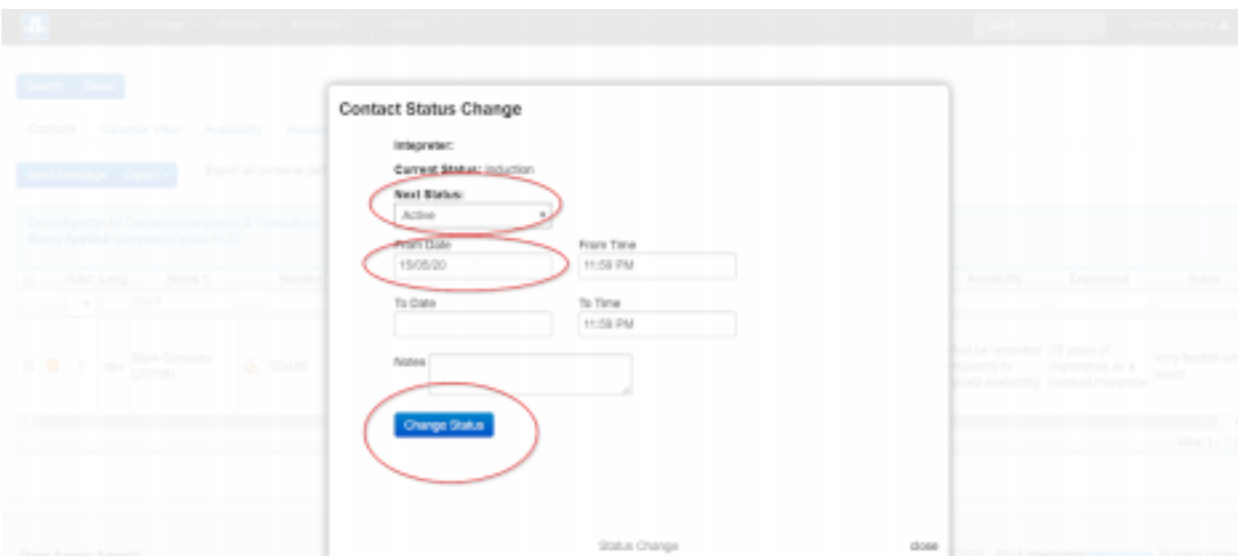
The following file types will ONLY be visible to **Customers** on their portal who have been granted the Compliance Auditor privileges if you enable the **Public** checkmark on the attached file:

- Customer Confirmation
- Interpreter Confirmation
- Invoice
- Contract
- Payment
- Export
- Activation
- Medical Requirements
- Training/Continuing Education
- Assessments

Don't forget to save the **Contact** profile using the blue **Save** button in the navigation pane to the left-hand side.

When you first **Save** an interpreter profile, it will be in **Induction** status. This implies that you are still onboarding this interpreter. If you are ready to offer them jobs, you will need to **Activate** their profile:

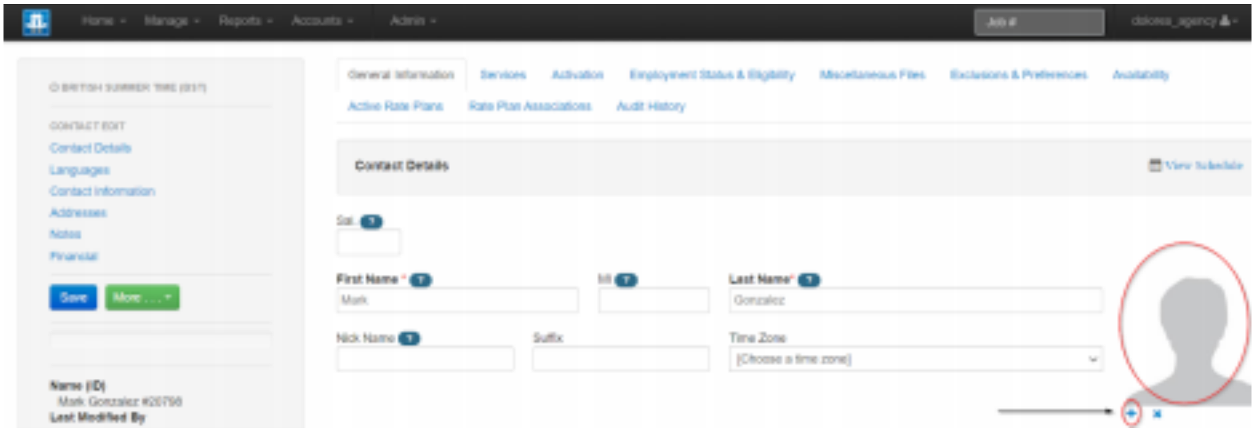
➔ Navigate back to the **'Manage'** menu and select **'Manage Contacts'** from the 'Contacts' section
➔ Select the drop-down box to see a menu of various actions and select **Change Status**
➔ In the **Next Status** field, select **Active** and click the **Change Status** button.



4

Now you have successfully completed and **Activated** an Interpreter/**Contact** Profile!

If you wish, you can also **Edit (in Full)** from the drop-down menu next to a **Contact** and add a photo to the **Contact** Profile under the **General Information** tab and be sure to always **Save** after making any changes.



Also from the **'Manage Contacts'** page you can:

➔ Filter Contacts by typing into any of the columns at the top of the table or by selecting the dropdown options where available
➔ Select one or more **Contacts** to send a message to, convenient for any agency-wide communications
➔ Select the drop-down menu next to a **Contact** to **View** or **Edit** a profile plus other actions
➔ You will notice that there are additional useful views/tabs here such as a **Calendar view**, **Availability** and **Assessments.**
➔ **Export** data for reporting purposes
➔ Use the advanced **Search** function

Exporting Interpreter Data

There are several Export options available with various levels of Interpreter data, for example you can Export Availability, Eligibilities etc. It is recommended that you experiment with these options to find the data that you need as you may need different data in different circumstances.

If you wish to run a test Export you can first filter for 1 or 2 records and then select Export all contacts (with current filters applied) before running the Export. Anytime you wish to Export only a subset of filtered data you will need to select Export all contacts (with current filters applied) prior to running the Export, otherwise all data will be Exported.

As well as using the column headers to filter Interpreter records, you can also use the Search function to build a more sophisticated query of conditions:

➔ Simply click on the Search button
➔ Select Add Condition
➔ Select the Search attribute such as Eligibility for example and fill out the remaining query fields such as the name of an Eligibility
➔ You can continue to add conditions such as a Language, Rating etc. in order to define the particular set of Interpreters required
➔ You can also use Add Group if you wish to define alternative conditions such as OR/NOT etc. For example, in the screenshot below, this query will search for Interpreters that have All Services Enabled or that have the Face to Face Service enabled
➔ Once you have created your query you can then Save this for future use
➔ The Saved Searches tab will have a list of all Saved queries, including any that have been built elsewhere in ii

where the query builder is available, such as Manage Jobs for example