

We have mentioned Qualifications & Eligibilities briefly in other documents when Creating Contacts and Creating bookings. Now let's look at how to set these up so they can be applied to **Contact** profiles and added as **Requirements** to bookings.

Firstly, let's describe the difference between an Eligibility and a Qualification:

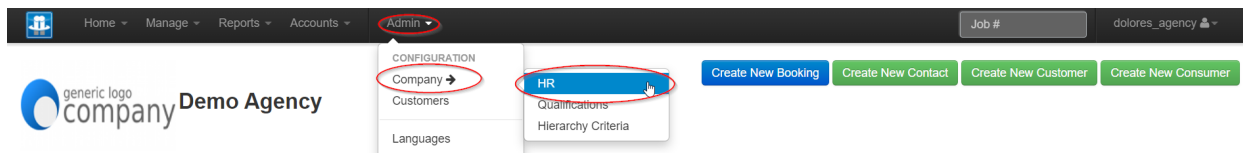
- **Eligibilities** - are basic criteria that must be met by either some or all your **Contacts/Interpreters** to work for your agency or to work in certain settings while working for your agency. For example, you may have a base requirement for all **Interpreters** to have a valid passport, or **Interpreters** that work in a medical setting may require an annual flu vaccine. Eligibilities are mainly managed from a HR perspective but can also be added as a **Booking** requirement if relevant.
- **Qualifications** - are certain qualifications or certifications that your **Interpreters** may hold or be required to meet for certain settings and/or **Bookings**. These criteria would be selected as a **Requirement** at the **Booking** level and only those **Interpreters** who meet the relevant requirement, i.e. hold that qualification, will be filtered as eligible for offering/assignment on that **Booking**. For example, a **Customer** may request an appointment for a Court Certified **Interpreter** or an American Sign Language Certified **Interpreter**. Once such a qualification has been set up on your system, subsequently associated with the relevant **Interpreters** and added as a **Requirement at Booking** level, the system will then filter only those **Interpreters** who meet the qualification.

Note that both **Eligibilities & Qualifications** from a system perspective are **Criteria**, choosing the **Criteria Type** subsequently defines it as an **Eligibility** or a **Qualification** and this choice will be down to how you like to organize from a business perspective.

Eligibilities

To setup **Eligibilities**:

- Navigate to the '**Admin**' menu, hover on '**Company**' and select '**HR**' on the side menu



- Click on the **New Criteria** button on the left hand side
- Enter a **Name** and a **Description** for the Eligibility

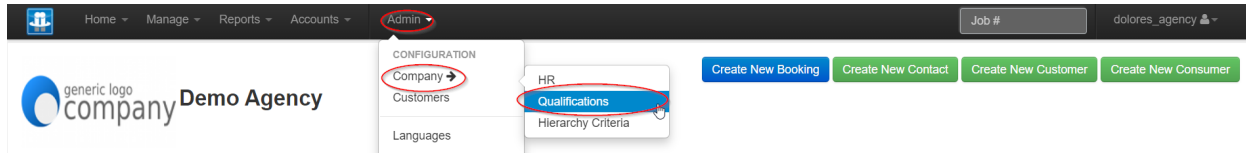
- Choose a **Policy** from the dropdown menu; functionally this does not change any behavior in the system, however the Policy will give you a visual cue on any actions that need to be taken:
 - ◆ If an Eligibility/Criteria is **Valid** (in date) it will appear in **Green** when viewing the corresponding Contact record
 - ◆ If a **Strict** policy is chosen and it is out of date/Invalid, the Criteria will appear in **Red**
 - ◆ When **Lenient** is chosen the Criteria will be **Yellow** when Invalid
 - ◆ If **Info** is selected, the Criteria will remain **Green** regardless of the validity status
- Set the number of days of Validity, for example if this is an annual Criteria you can enter 365
- Choose whether the Criteria is **Active** or **Inactive** (a Criteria can be Inactivated at any time if it is no longer a Requirement, note that they cannot be deleted for retrospective record keeping)
- Finally, there are a number of checkboxes which will help you to define how the Criteria is managed:
 - ◆ **Notify Expiration** - will determine whether the **Interpreter** is notified about pending expiry. All notifications will be sent to the **Interpreters Primary** email address and to the **Interpreter Manager** if this field is populated with a valid email address under **Admin > Company - Configuration** tab. The number of days previous to set for expiration notices can also be set under **Admin > Company - Notifications** tab and the field: Days prior to expiration notice (Employment Eligibility)
 - ◆ **Customer Specific** - this setting is a legacy setting and takes no action
 - ◆ **Enable for Booking** - will allow the Eligibility/Qualification appear on the **Booking** form under the **Add Requirement** link below the References
 - ◆ **Interpreter Can Manage - Interpreters** can update and adjust the criteria from the Interpreter Portal themselves
 - ◆ **Inactivate Interpreter** - will mark an **Interpreter** as **Inactive** if the criteria is expired
 - ◆ **Preset Criteria** - the criteria will automatically be assigned to new **Interpreters** upon creation, the criteria will default to Invalid for new **Interpreters** until it is validated
 - ◆ **Exclude from Assignment** - there will be no effect on an **Interpreter** appearing for assignment despite having the criteria expired. If this is Not checked, an **Interpreter** with an expired Criteria will not appear for assignment
 - ◆ **Enable for On Demand Calls (VRI / OPI)** - this allows the qualification to be used as a filter for three specific categories of interpreter via the on-demand Boostlingo Hub functionality. Please see notes about Boostlingo Hub and qualifications.
- Finally, click the check mark ✓ icon at the top of the Criteria to **Save** it

The screenshot shows a web application interface for creating a qualification. At the top, there is a navigation bar with links for Home, Manage, Reports, Accounts, and Admin. A search bar for 'Job #' and a user profile for 'kimdiaz' are also visible. The main content area is divided into two sections. On the left, a sidebar titled 'QUALIFICATIONS' explains that these are used to define certifications and skills for interpreters and translators, with a 'New Qualification' button. The main form area is titled 'Qualification / Certification' and contains several input fields: a dropdown menu set to '2023 Certification', a text input field containing '2023 Certification', an 'Info' dropdown menu, and a 'Duration of validity (days)' input field set to '01/01/23'. There is also an 'Inactive since' input field. On the right side of the form, there is a 'Service Type (BPIN)' dropdown menu set to '[No Preference]'. Below the form, there is a metadata section showing 'Created By: christine_demo', 'Created: 12/09/22 2:15 PM', 'Modified By: christine_demo', and 'Modified: 12/09/22 2:15 PM'. At the bottom of the form, there are several checkboxes for management settings: 'Notify Expiration', 'Customer Specific', 'Enable for Booking', 'Interpreter can Manage', 'Inactivate Interpreter', 'Preset Criteria', 'Exclude from Assignment', and 'Enable for On Demand Calls (VRI / OPI)'. A blue checkmark icon is visible at the top right of the form area, indicating the save action.

Qualifications

To setup **Qualifications**:

- Navigate to the '**Admin**' menu, hover on '**Company**' and select '**Qualifications**' on the side menu (Note that you can also do this from the **HR** menu as above and when adding the new Criteria simply select **Qualification** as the **Type**)



- Click on the **New Qualification** button on the left hand side
- As outlined above, both **Qualifications** and **Eligibilities** are all **Criteria** within the system, the only difference being the type, therefore the Qualifications screen is the same as the Eligibilities screen
- Please follow the steps as outlined in the **Eligibilities** section above
- Note that you will most likely check the **Enable for Booking** checkbox as Qualifications are most commonly used at the **Booking** requirement level
- Make sure to click the check mark ✓ icon at the top of the Criteria to **Save** it

Adding Eligibilities & Qualifications to a Contact

Now that Eligibilities & Qualifications have been set up according to your agency needs they can be associated with Contact profiles in order to manage that your Contacts are meeting agency criteria and or to manage their additional Qualifications.

To do this:

- Navigate to the '**Manage**' menu and select '**Manage Contacts**'
- Click on the dropdown menu beside the relevant Contact and click **Edit (in full)**
- Click on the **Employment Status & Eligibility** tab

To add an **Eligibility**:

- Click on the **Add Eligibility** link
- Select a Criteria from the list that you will have setup in the earlier part of this document
- All other fields are optional, you may for example wish to add a date on when this Criteria was Validated
- Make sure to click the check mark ✓ icon at the top of the Criteria to **Save** it
- You can continue to click the **Add Eligibility** link again to add any additional criteria
- When you have added all criteria that are relevant to this Contact, make sure to save the Contact profile by clicking the blue Save button on the left hand side

To add a Qualification:

- Click on the **Add Qualification** link
- Select a Criteria from the list that you will have setup in the earlier part of this document
- All other fields are optional, you may for example wish to add a date on when this Criteria was Validated
- Make sure to click the check mark ✓ icon at the top of the Criteria to **Save** it
- You can continue to click the **Add Qualification** link again to add any additional Criteria
- When you have added all Criteria that are relevant to this Contact, make sure to save the Contact profile by clicking the blue Save button on the left hand side

The screenshot shows a web application interface for managing contact profiles. The top navigation bar includes links for Home, Manage, Reports, Accounts, and Admin. The main content area is divided into several sections: General Information, Services, Activation, Employment Status & Eligibility, Miscellaneous Files, Exclusions & Preferences, and Availability. The 'Employment Status & Eligibility' section is currently active, showing 'Employment Category' and 'Automated Assignment' both set to 'Contractor'. Below this, the 'Employment Eligibility' section is expanded, displaying a list of 'Qualifications'. The first two items are '[Choose a Qualification]' and are circled in red. A blue callout box points to the tick mark icon next to the first item, stating 'Click this tick mark to save the Qualification when you have entered all relevant info'. Another blue callout box points to the list of qualifications, stating 'These criteria must first be setup within the Company Configuration'. The list includes '(X) Court Certified', '(X) RSLI', and '(X) Translation Project'. To the right of the list, there are fields for 'Qualification State' (set to 'Valid'), 'Confirmed On', and 'Valid Until', along with an 'Add Backing Document' button. The sidebar on the left shows contact details for 'Mark Gonzalez #20798' and includes a 'Save' button.

Adding Qualifications to a Booking

Now that your Qualifications have been established for your agency and subsequently assigned to relevant **Contacts**, you can now begin to add these as **Requirements** to your **Bookings** (note that only **Criteria/Requirements** which have **Enable as Booking Requirement** can be added to **Bookings**):

- Create a new **Booking/Job** as normal and choose the **Customer, Client, Requestor, Location** etc.
- In the **Appointment Details** section you can then choose the Language, Service Type, Consumer etc.
- On the right hand side click the **Add Requirement** link
- You can then choose a Requirement from the list of Qualifications/Eligibilities that you have previously setup and where **Enable for Booking** was flagged
- Complete the **Booking** by populating the **Calendar** and any other relevant sections and save the **Booking**

Let's look at **Offering** and/or **Assigning** this **Job**:

- Go to the **Assignments** tab of the **Job** that you have just created
- Click on the **Unassigned** link
- At-a-glance you can now see that there is 1 **Booking Filter** which is the **Requirement** that was just added when creating the **Job**
- You will also see that only Contacts who have that Qualification associated with their profile will appear in the **Interpreter List**
- Remember, if no **Interpreters** appear in this list, you can toggle with the **Job** filters by clicking on **Job Summary (Show/Hide)**
- You can also remove the **Requirement/Qualification** by clicking **Booking Filters** and clicking the **Red Trash Icon** beside the relevant **Requirement(s)**
- You can then proceed to **Offer** and/or **Assign** this **Job** to the **Interpreter List** as usual

Interpreter List	Rat	Cat.	Lang.	Name	Number	Region	Active Note	Availability	Experience	Notes	Rate
<input type="checkbox"/>		con	spa	Mark Gonzalez(...)	123456		Activated in May 2020 following an interview with Interpreter Manager	Must be reminded frequently to update availability	20 years of experience as a medical interpreter	Very flexible with travel	

Booking Requirements and Rates

As we outlined above, **Criteria/Requirements** which have **Enable as Booking Requirement** flagged can be added to **Bookings**. In addition, you can also add specific **Rates** for **Booking Requirements** to your **Rate Plans**. For example, you may charge higher rates for certain **Booking Requirements**.

To do this, simply click '**Add Qualification Rates**' where applicable on the **Rate Plan** and select the appropriate **Criterion** that you wish to apply rates to.



This is covered in more detail on Rate Plan documentation within the Financials section.

Adding Qualifications at Customer Level

You can also add **Qualifications** at a **Customer** level so that these will persist as **Requirement(s)** for all **Bookings** for that **Customer** (note that only Requirements which have '**Enable as Booking Requirement**' will be added to **Bookings**).

- Navigate to the '**Admin**' menu and select '**Customers**'
- Search for and select the appropriate **Customer** in the list on the left hand side
- On the **General Configuration** tab, scroll to the very bottom
- Under the **Booking Requirements** section, Select **Add Eligibility** or **Add Qualification** as required
- Choose the **Eligibility** or **Qualification** as setup in the earlier sections of this document
- If you select the **Required** checkbox, this **Requirement** will be added to all **Bookings** and cannot be removed; if the **Required** checkbox is not enabled, the **Requirement** will be added to all **Bookings** but will have a **Red Trash icon** beside it so that it can be removed from the **Booking** if required
- When you have added any **Eligibilities** or **Qualifications** as required, be sure to **Save Changes** in the Navigation pane on the left hand side
- If you create a **Booking** for this **Customer** you will see that the **Requirements** are automatically added as enabled on the **Customer** configuration

Adding Qualifications at Consumer Level

You can also add **Qualifications** and/or **Eligibilities (Criteria)** at a **Consumer** level so that these will persist as **Requirement(s)** for all **Bookings** for that **Consumer** (note that only Requirements which have '**Enable as Booking Requirement**' will be added to **Bookings**).

- Navigate to the '**Manage**' menu and select '**Manage Consumers**'
- Using the dropdown menu next to the relevant **Consumer**, select **Edit**
- Go to the **Criteria** tab
- Start typing the name of a **Criteria** in the specified box and then select the appropriate criteria from the lookup (**Criteria** must be added in advance)
- Select **Add criteria**
- Use the blue **Save** button to save the Consumer profile
- When a **Booking** is next created for this **Consumer**, the added **Criteria** will be attached to the **Booking**
- To remove **Criteria** in the future, select **Remove Criteria** next to the relevant **Criteria** listed



Home Manage Reports Accounts Admin

GREENWICH MEAN TIME (GMT)

CONSUMER EDIT
Consumer Details
Notes

Save More

4

Name (ID)
Juan Rodriguez #39137
Last Modified By
dolores_agency
Last Modified
09/02/21 13:13
Created By
dolores_agency
Created
21/05/20 10:55

General Information Exclusions & Preferences Customers Criteria Audit History

Add Criteria

1 cour 3 Add criteria

2 Court Certified

Consumer Criteria

RSLI
RSLI Qualification
5 Remove criteria

Adding Requirements to Bookings using Reference Fields

You can also create Reference Fields that will automatically add criteria such as Eligibilities and Qualification to Bookings - see Reference Fields document for more info.

