



# Online Portal Guidebook

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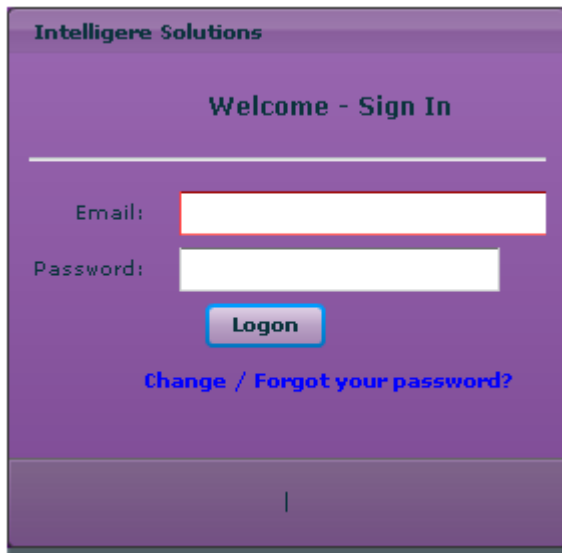
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## System Login

Visit <http://atrium.intelligeresolutions.com/>

To login, enter your email address and password.

Upon the initial setup of your account with Intelligere™ all identified users will be sent a temporary password. If at any time additional people need to obtain access, please contact us.



The image shows a screenshot of the Intelligere Solutions login page. The page has a purple header with the text "Intelligere Solutions" in the top left corner. Below the header, the text "Welcome - Sign In" is centered. A horizontal line separates the header from the login form. The form consists of two input fields: "Email:" and "Password:". Below the "Password:" field is a "Logon" button. At the bottom of the form, there is a link that says "Change / Forgot your password?".

# Navigating Main Page (Dashboard)

Once logged in, you will see the main page of the system.

The dashboard features several widgets on the left side:

- Unassigned Requests:** A table showing request counts by due date range.
 

DUE IN	NBR
Less than 3	0
3 to 7	1
8 to 21	1
22 to 31	4
More than 31	0
- Number of Requests:** A summary table.
 

Today	0
Week	2
Unassigned	10
Missing Actuals	0
Needs Approval	1
- Weekly Top Interpreters:** A table with columns for Last Name, First Name, and Count.

The main area displays **Important Requests** with tabs for Today (0), Not assigned (10), and Calendar (14). A message states "Requests scheduled for today." Below this is a large table with columns: ID, Schedule Date, Length, Customer, Confirmation Sent, Age, Language, Interpreter, and LEP. The table is currently empty.

At the bottom, there is a search bar with "Contains All Words" and "clear" buttons, and "Add New Request" and "Refresh" buttons.

The second tab shows all of your Unassigned jobs Intelligere™ is working to secure an interpreter.

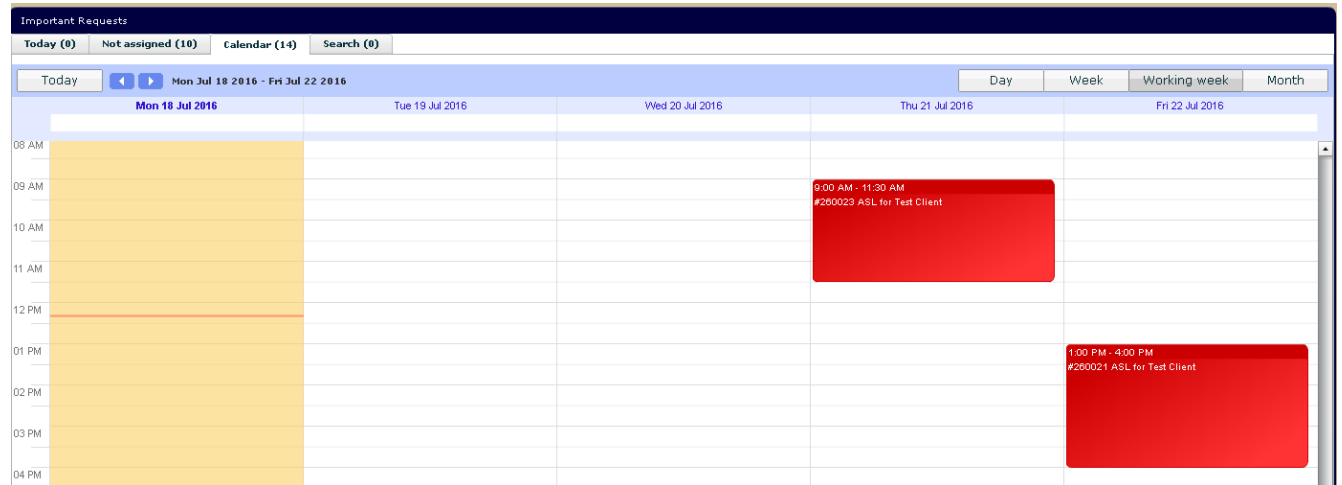
Important Requests

Today (0) Not assigned (10) Calendar (14) Search (0)

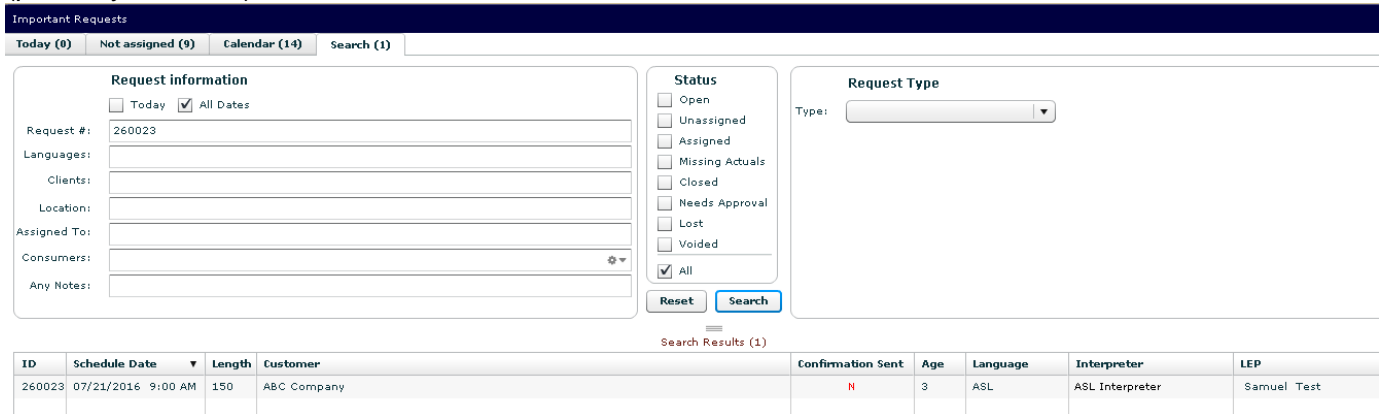
Requests with no interpreter assigned.

ID	Schedule Date	Length	Customer	Confirmation Sent	Age	Language	Interpreter
260023	07/21/2016 9:00 AM	150	Test Client	N	3	ASL	Unassigned
260021	07/22/2016 1:00 PM	180	Test Client	N	4	ASL	Unassigned
260024	07/28/2016 9:00 AM	150	Test Client	N	10	ASL	Unassigned
260027	08/11/2016 9:00 AM	150	Test Client	N	24	ASL	Unassigned
260073	08/12/2016 1:00 PM	180	ABC Company	N	25	Somali	Unassigned
260066	08/17/2016 1:00 PM	60	Test Client	N	30	ASL	Unassigned
260028	08/18/2016 9:00 AM	150	Test Client	N	31	ASL	Unassigned

The third tab shows a Calendar view on your requests and can be set to view a specific day, week, working week, or month.



The last tab provides a Search function. Here you are able to search through all of your requests based on a variety of items such as Request #, Language, Location, Consumers (patient/your client), etc.



## Creating a New Appointment Request

1. There are two ways to create a new request:

1. From the Dashboard or the Interpreter Database, click the **Add New Request** button at the bottom of the screen.
2. From the Calendar Tab of the Dashboard, double click the date and time you wish to create the request.



Both methods will result in a new request/job form popping up. If selected from the "Calendar" tab, the date and will already be populated in the form, otherwise you will have to enter it.

The screenshot shows a web-based form titled "Job #". At the top, there are four tabs: "Request", "Interpreters", "Actuals", and "Audit Trail". The "Request" tab is active. The form is organized into several sections:

- Request Information:** Includes fields for "Interpretation Date" (with a calendar icon), "Interpretation Time" (with AM/PM radio buttons), "Est. Duration" (set to 60 minutes at 2:16 PM), "Language", "LEP", and "LEP Phone".
- Request Type:** A dropdown menu.
- Service Details:** Includes "Preferred Qualifications" and "Required Qualifications" text areas.
- Request Location Address:** Includes "Client" (with a dropdown), "Bill To", a checkbox for "Location is same as client address", a "Show Location" button, and a "Country" dropdown (set to "United States").
- Service Requested by:** Includes "Contact Name" (with a dropdown and "New" button), "Email Address", "CC", "Phone" (with Work, Other, and Mobile sub-fields), "Notes", a "Send Confirmation Email" checkbox (checked), and a "Follow Up Call" checkbox.

At the bottom of the form, there are buttons for "Copy this job", "Repeat this job", "Void this job", "Close", "Cancel", and "Save".

The red asterisks indicate required information in order to create a request.

### ***Request Location Address***

The Client: field is a type ahead field which will make suggestions to you based on what you type in. Please enter your company name in the client field.

The Bill To field defaults automatically to bill the client.

This close-up shows the "Request Location Address" section. The "Client:" field is populated with "ABC Company" and has a dropdown arrow. The "Bill To:" field is also populated with "ABC COMPANY". The "Location is same as client address" checkbox is checked. The "Show Location" button is visible. The "Country:" dropdown is set to "United States". The "Notes:" field is empty.

The appointment location defaults to the address of the client. If the appointment is at a different location, unclick the Location is same as client address box and enter the correct information.

Location is same as client address  Country: **United States** ▼

Addr: 10000 Hwy 55 Suite 400

City: Plymouth **MINNESOTA** ▼ 55441

Notes:

**Location Notes** field is a free form to be used when you have additional location information to include (ex: Conference Room 2A).

### ***Request Type***

Request Type will default to the option most utilized by your company.

If the default is not correct for a specific appointment, you are able to change the Request Type to the option most appropriate to the appointment. Please then enter the appointment information based on the Request Type.

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**Request Type**

Type of Request: \* **Medical Appearance** ▼

Name of Doctor:

Name of Therapist:

Name of Counselor:

Department Name:

Gender: **Female only** ▼

For Medical Requests: The Gender field is where you are able to mark whether the interpreter for an appointment is “Female Only” or “Male Only”.

### ***Entering a new patient (LEP)***

The **LEP (Patient/Your Client)** field is a type-ahead field and will make suggestions as you type. If the LEP you are looking for is not in the database, you can add them by clicking the green + symbol. A new patient screen will appear.

LEP

Note: You must enter your client name and bill to information **BEFORE** entering or adding a new LEP.

When the New Patient form appears, it defaults to the Profile tab. Enter all of the patient information you have on the profile tab and click Save and then click Ok when prompted.

For a New Patient profile please provide the information outlined (highlighted below):

- First Name
- Last Name
- Address
- City, State, Zip
- Birth Date
- Gender
- Language
- Primary Phone

The screenshot shows a software window titled "New Patient" with a close button (X) in the top right corner. The window contains a tabbed interface with five tabs: "Profile \*", "Insurance", "Customers", "Work Log", and "Comment". The "Profile \*" tab is active. On the left side of the form, there is a placeholder for a patient photo, a button labeled "Upload Photo", and an "ID:" field with the value "0". The main form area is divided into two columns. The left column contains fields for "First Name: \*", "Last Name: \*", "Client MR#:", "Email:", "Address 1:", "Address 2:", "City:", "Country: \*" (with a dropdown menu set to "United States"), "State:", and "Zip:". The right column contains fields for "Patient #:", "SSN:", "Birth Date:" (with a calendar icon), "Gender:" (with radio buttons for "Male" and "Female"), "Language:" (with a dropdown menu), "Primary Phone:", "Secondary Phone:", "Responsible Party:", and "Client Comments:". At the bottom of the window, there are three buttons: "Previous", "Next", and "Close", "Cancel", and "Save". The "Save" button is highlighted in yellow.

Once saved, click the "Insurance" tab (if applicable) if you have the patient's insurance information and click Add Insurance to enter the insurance information.

## Adding Patient Insurance Information

For general insurance please provide the information outlined below (highlighted below):

Insurance Name: Choose appropriate insurance company

Group Number: Document if available, not required

Member ID: REQUIRED

Effective Date: REQUIRED

The screenshot shows a web form for adding patient insurance information. The form is divided into two columns. The left column contains fields for Insurance Name (dropdown menu with 'HP' selected), Policy # (text box), Group # (text box with '123456'), Member ID (text box with 'G000012345'), Primary Holder (text box), and Relation to Insured (dropdown menu). The right column contains fields for Effective Date (calendar icon with '07/01/2016'), Expiration Date (calendar icon), Eligibility (dropdown menu with 'Eligible' selected), and Comments (text area). At the bottom right of the form are buttons for 'Delete Insurance' and 'Add Insurance'. Below the form are navigation buttons: 'Previous', 'Next', 'Close', 'Cancel', and 'Save'.

For worker's comp/auto please provide the information outlined below:

Insurance Name: Choose WC/Auto

Member ID: Claim Number

Effective Date: Date of Injury

Eligibility: Choose Eligible

Comments:

Name of Insurance Company

Claims Mailing Address

Insurance Company's Phone Number

Adjuster's Name & Phone Number (if available)

The screenshot shows a web form for adding patient insurance information for worker's comp/auto. The form is divided into two columns. The left column contains fields for Insurance Name (dropdown menu with 'WC/Auto' selected), Policy # (text box), Group # (text box), Member ID (text box with '23456-89'), Primary Holder (text box), and Relation to Insured (dropdown menu). The right column contains fields for Effective Date (calendar icon with '02/02/2016'), Expiration Date (calendar icon), Eligibility (dropdown menu with 'Eligible' selected), and Comments (text area with 'American Family', '6000 American Pkwy', and 'Madison WI 55555-1111'). At the bottom right of the form are buttons for 'Delete Insurance' and 'Add Insurance'. Below the form are navigation buttons: 'Previous', 'Next', 'Close', 'Cancel', and 'Save'.

When all of the information you have regarding the patient is filled in for each tab, click the Save button. Now you can go back and type their name into the LEP field and select that person.



Note: Once this patient has been added, they are automatically saved into your patient database for future appointments.

### Service Details Field

**Service Details** (Important to complete) is where you document the nature of the appointment or other pertinent information, providing the interpreter an idea of what the appointment will entail\*. (ex: Surgery on the left hand. Surgery will be from 11a-1p.).

\*The more information provided the better prepared the interpreter can be.

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#### Service Details

### Requestor's Information

**Service Requested By** names may be in the drop down box and can be chosen. By selecting a name already stored, the contact information will automatically be populated into the fields.

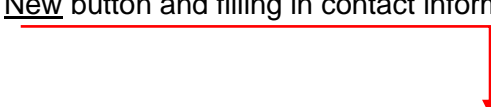
#### Service Requested by

Contact Name:	<input type="text" value="Vince Scheduler"/>	<input type="button" value="New"/>
Email Address:	<input type="text" value="vince@intelligeresolutions.com"/>	CC: <input type="text"/>
Phone:	<input type="text" value="(952) 920-6160"/>	Other: <input type="text"/>
		Mobile: <input type="text"/>
Notes:	<input type="text"/>	

Otherwise, you can add contacts by clicking the New button and filling in contact information.

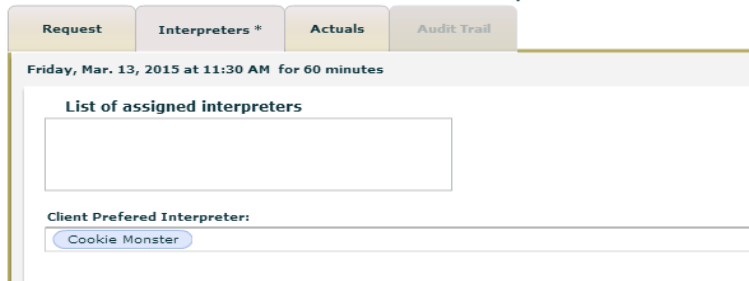
#### Service Requested by

Contact Name:	<input type="text"/>	<input type="button" value="New"/>
Email Address:	<input type="text"/>	CC: <input type="text"/>
Phone Work:	<input type="text"/>	Mobile: <input type="text"/>
Notes:	<input type="text"/>	



## Requesting a Preferred Interpreter

If you have a specific interpreter whom you would like for this request, click on the “Interpreters” tab and type the chosen interpreter’s name into the **Client Preferred Interpreter** box, when you begin typing, options will be shown to you, select the preferred interpreter.



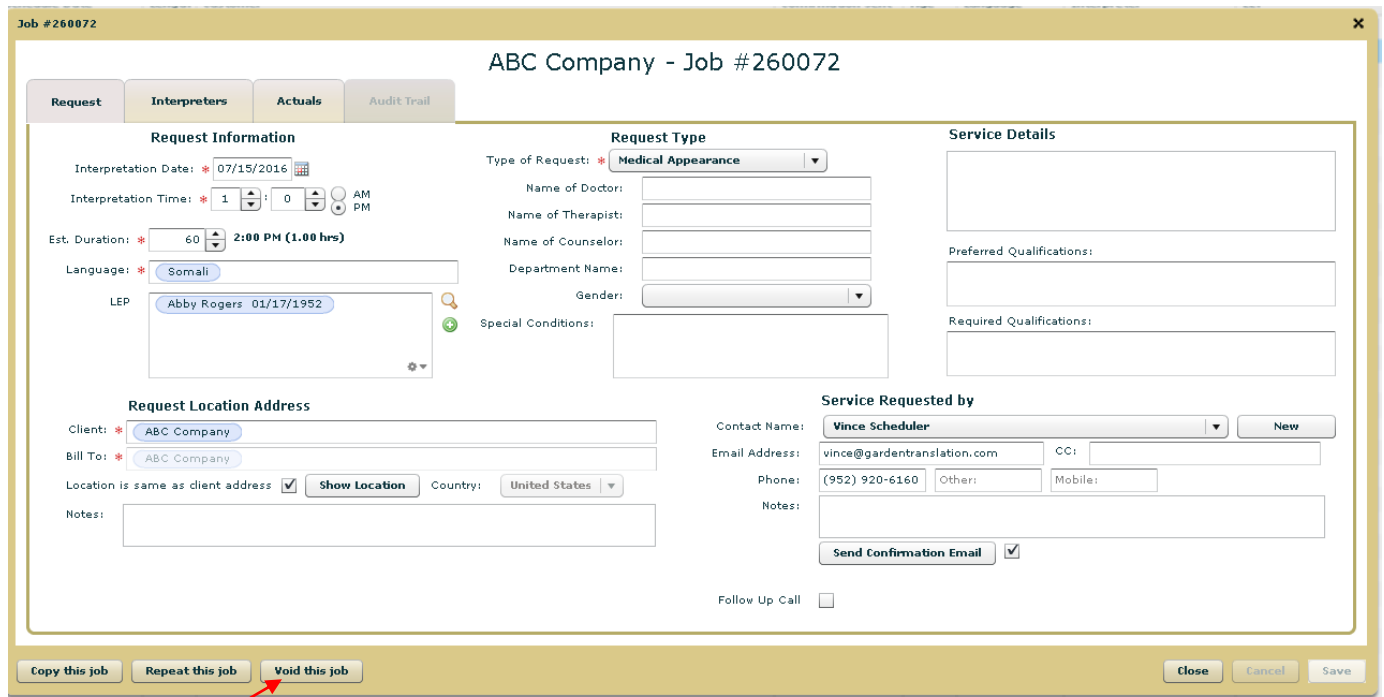
The screenshot shows a web interface with four tabs: Request, Interpreters, Actuals, and Audit Trail. The 'Interpreters' tab is active. Below the tabs, it says 'Friday, Mar. 13, 2015 at 11:30 AM for 60 minutes'. There is a section titled 'List of assigned interpreters' with an empty text box below it. Below that is a section titled 'Client Preferred Interpreter:' with a text box containing 'Cookie Monster'.

After you have entered all of the information, hit the “Save” button and then close the request form.

## Cancelling (Voiding) an Open Appointment

Find the request you need to cancel in the database and click on the “Interpreters” tab.

Note: This function is available up to 12 hours before the appointment.



The screenshot shows a web interface for 'Job #260072' titled 'ABC Company - Job #260072'. It has four tabs: Request, Interpreters, Actuals, and Audit Trail. The 'Interpreters' tab is active. The form is divided into several sections: 'Request Information' (Interpretation Date: 07/15/2016, Interpretation Time: 1:00 PM, Est. Duration: 60, Language: Somali, LEP: Abby Rogers 01/17/1952), 'Request Type' (Medical Appearance), 'Request Location Address' (Client: ABC Company, Bill To: ABC Company, Location is same as client address: checked, Country: United States), 'Service Details' (empty), 'Service Requested by' (Contact Name: Vince Scheduler, Email Address: vince@gardentranslation.com, Phone: (952) 920-6160), and 'Notes' (empty). At the bottom left, there are three buttons: 'Copy this job', 'Repeat this job', and 'Void this job'. A red arrow points to the 'Void this job' button. At the bottom right, there are buttons for 'Close', 'Cancel', and 'Save'.

Click Void this Job on the bottom left of the form and then click Save before closing the form.

## Creating a duplicate or multi-date Appointment

If you have a duplicate request, create the initial request as explained above and click Save.

Once the request is saved you are given the Job #, from that same open request form, click the Copy this job button on the bottom left of the form.

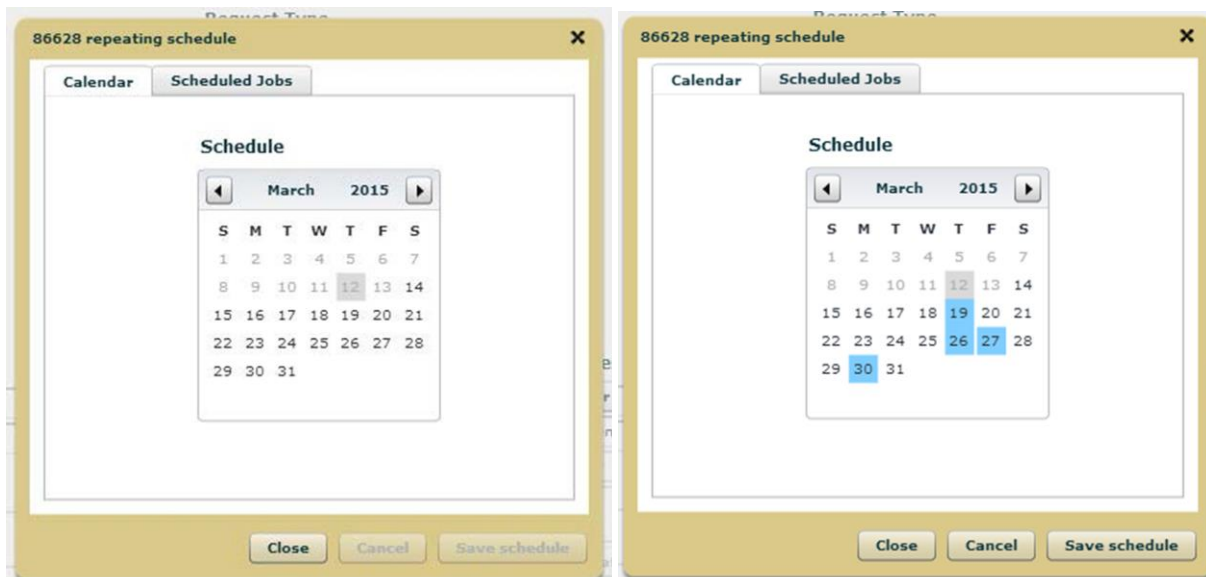


By copying the job, a new job form will appear with all of the same information copied into it from the original request, minus the date. You will only need to enter the new date. Then click Save.

A screenshot of a 'Request Information' form. It contains two main fields: 'Interpretation Date: \*' with a text input box and a calendar icon, and 'Interpretation Time: \*' with a time selection interface showing '11' for hours and '0' for minutes, and radio buttons for 'AM' and 'PM'.

If you have a multi-date request, click Repeat this job. A calendar will appear and you can highlight all of the dates of your interpretation requests for this job.

Note: Service details will not be copied into the new job. Please copy and paste those into the new jobs if applicable.



After you have selected the necessary dates, click Save Schedule and then Save on the original job request, you will be provided with a list of job numbers for these requests.

## Portal Tips

Do **not** copy or repeat past jobs.

Copying and Repeating are **only** to be used when all of the information is going to remain the same – LEP, Location, Language, etc.

When you are finished working in our Interpreter Request System, please **Logout** of the site.