Online Portal Guidebook

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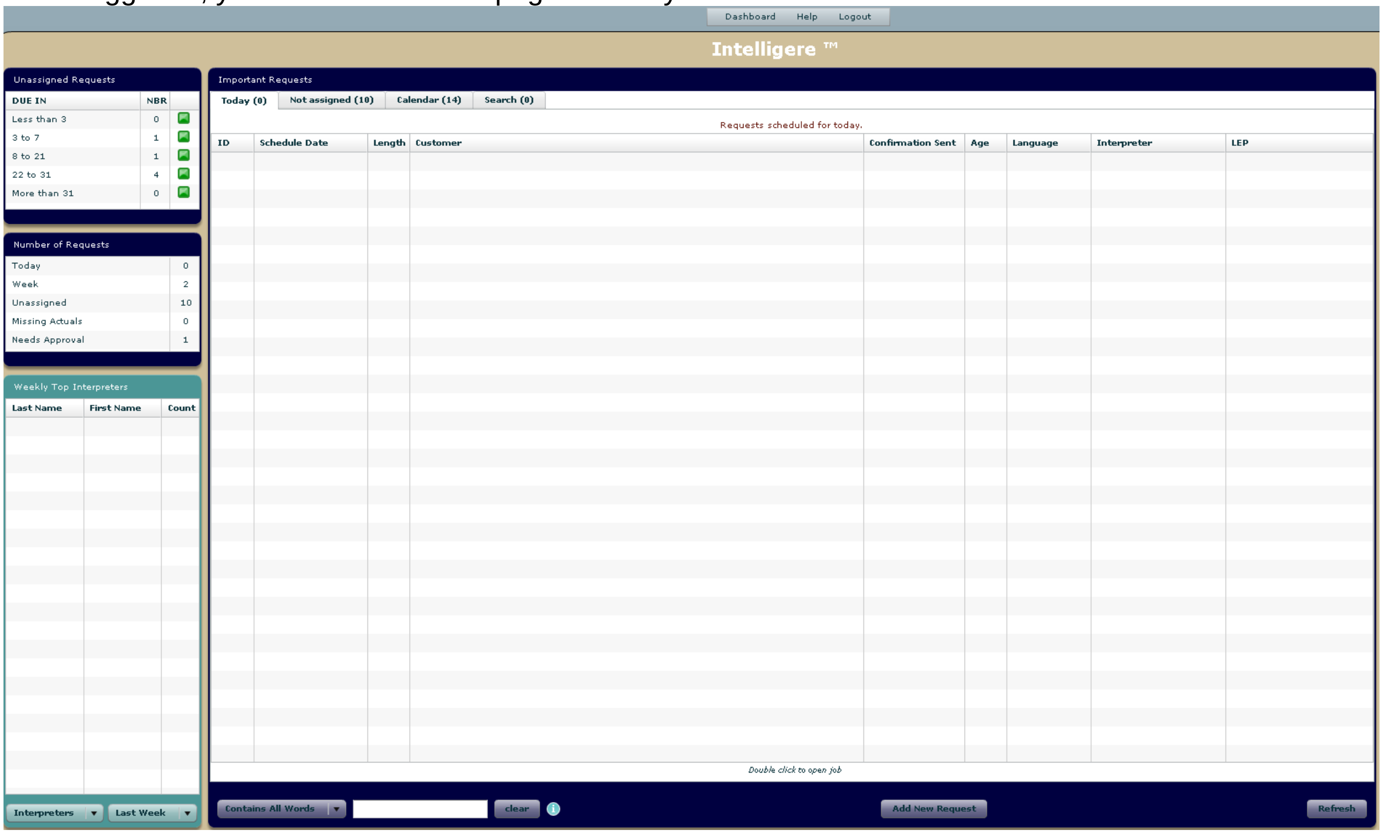
System Login

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.

Navigating Main Page (Dashboard)

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



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

Important Requests

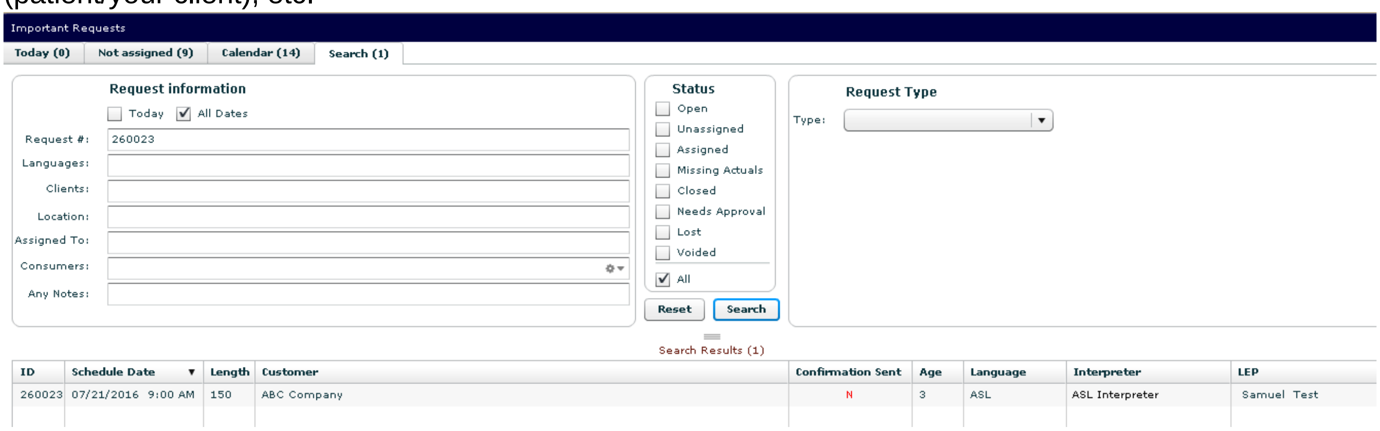
Today (0) | Not assigned (10) | Calendar (14) | Search (0)

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.

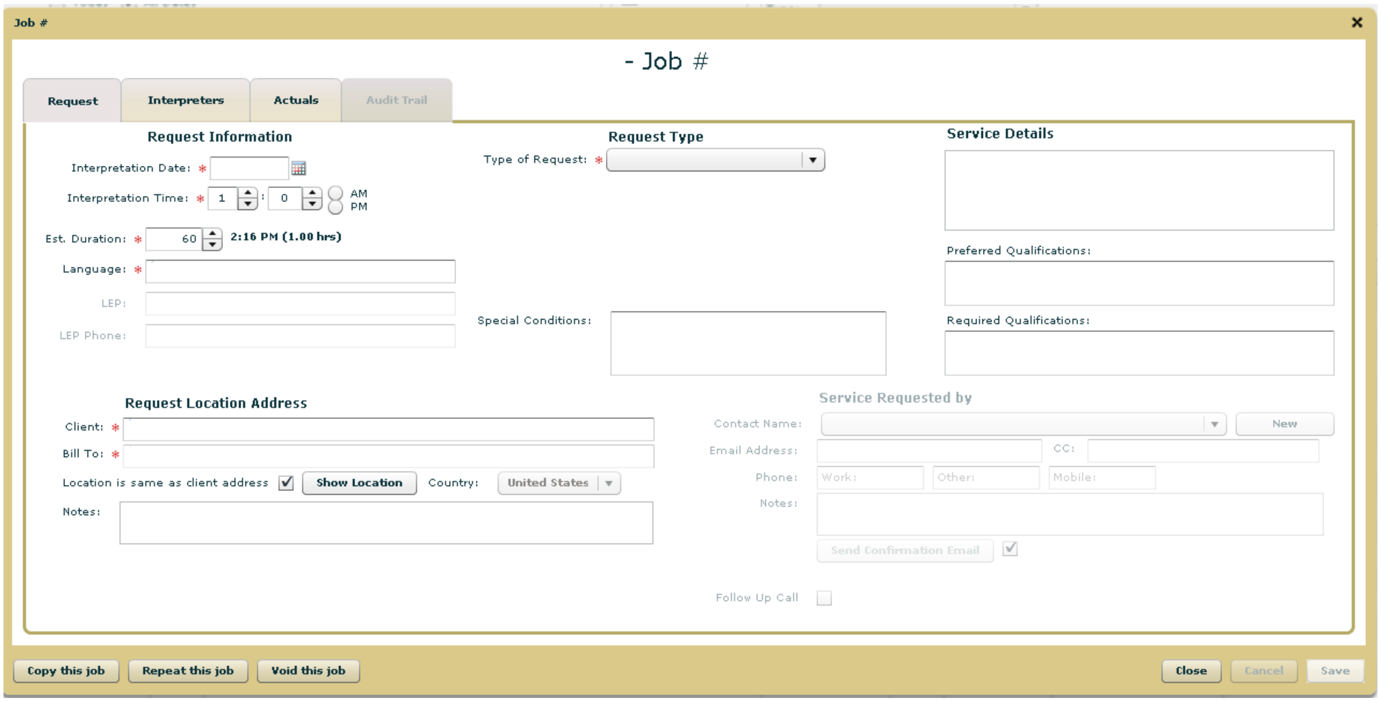


Creating a New Appointment Request

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.

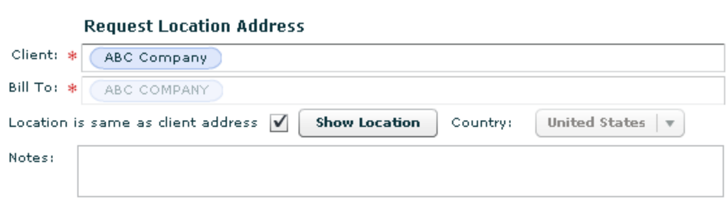


The red asterisks indicate required information in order to create a request.

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.



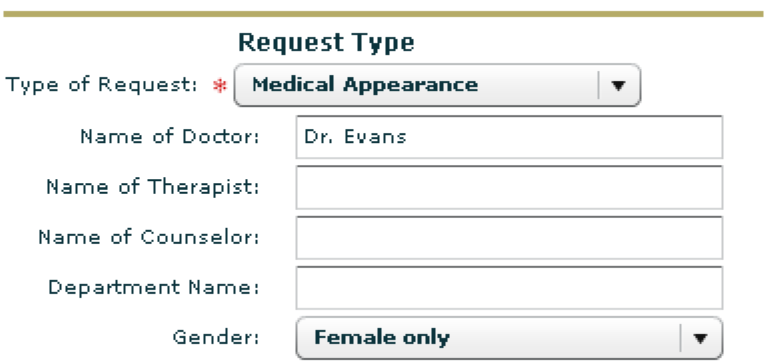
The appointment location defaults to the address of the client. If the appointment is at a different location, unclick the Location is same as client address box and enter the correct information.

Location 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.

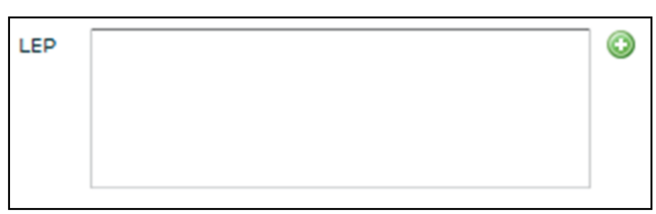
If the default is not correct for a specific appointment, you are able to change the Request Type to the option most appropriate to the appointment. Please then enter the appointment information based on the Request Type.



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)

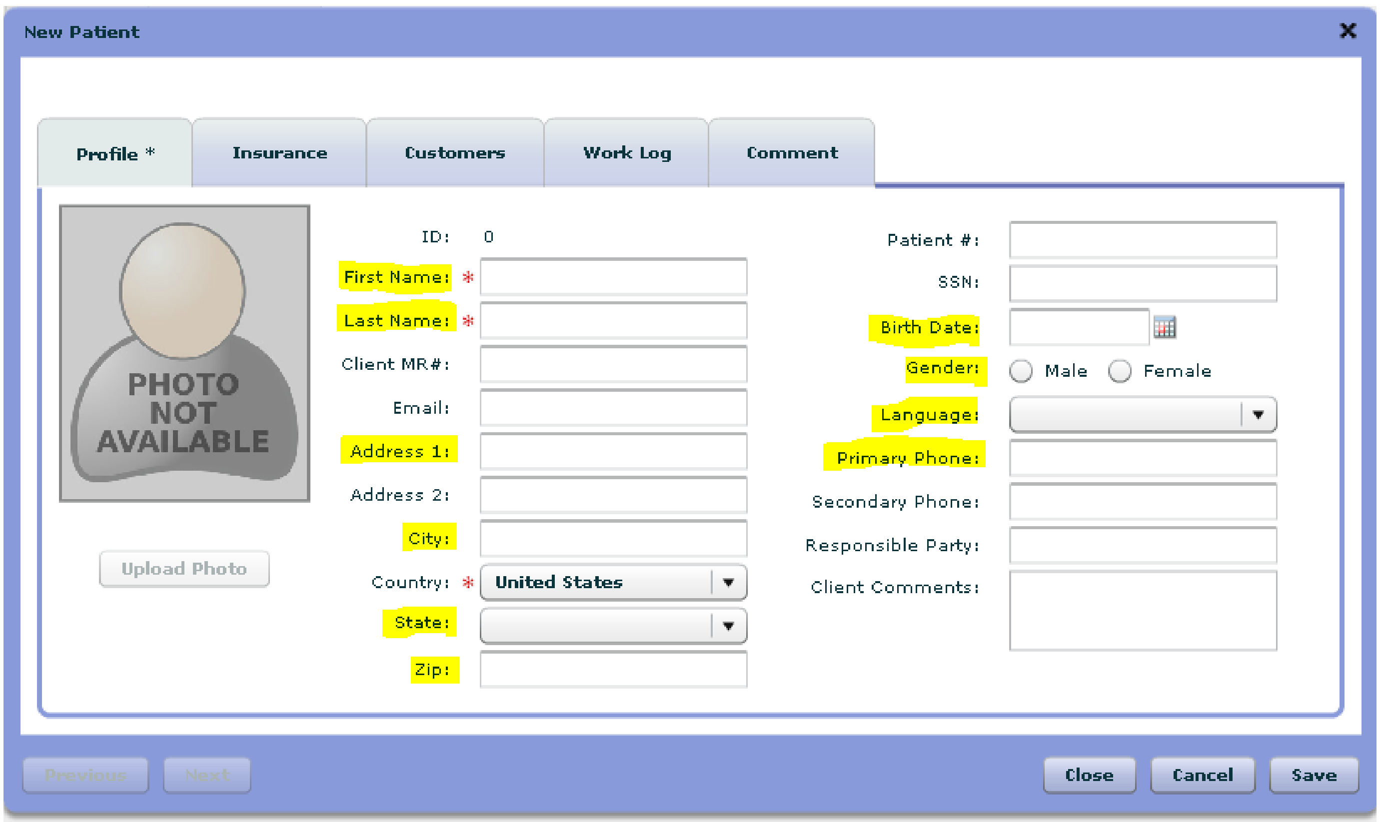
The **LEP (Patient/Your Client)** field is a type- ahead field and will make suggestions as you type. If the LEP you are looking for is not in the database, you can add them by clicking the green + symbol. A new patient screen will appear.



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

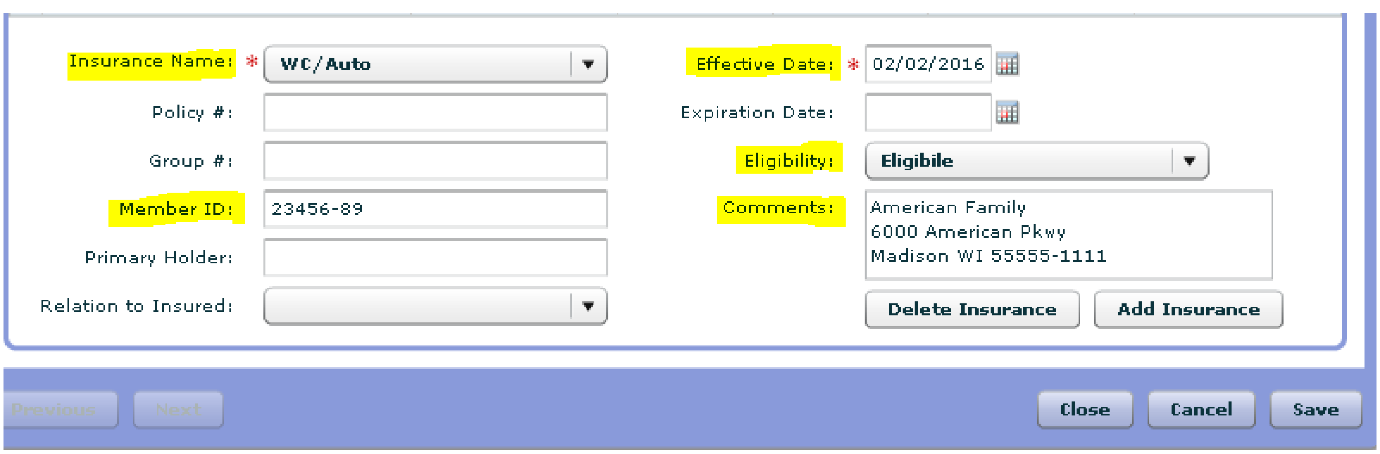


Once saved, click the "Insurance" tab (if applicable) if you have the patient's insurance information and click Add Insurance to enter the insurance information.

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

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)

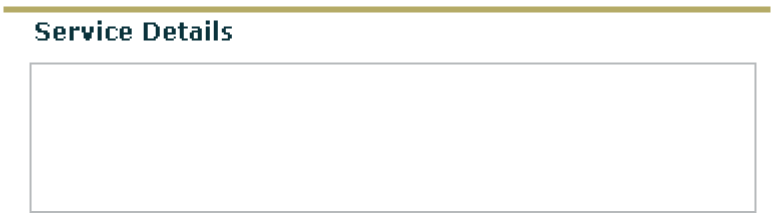


When all of the information you have regarding the patient is filled in for each tab, click the Save button. Now you can go back and type their name into the LEP field and select that person.

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

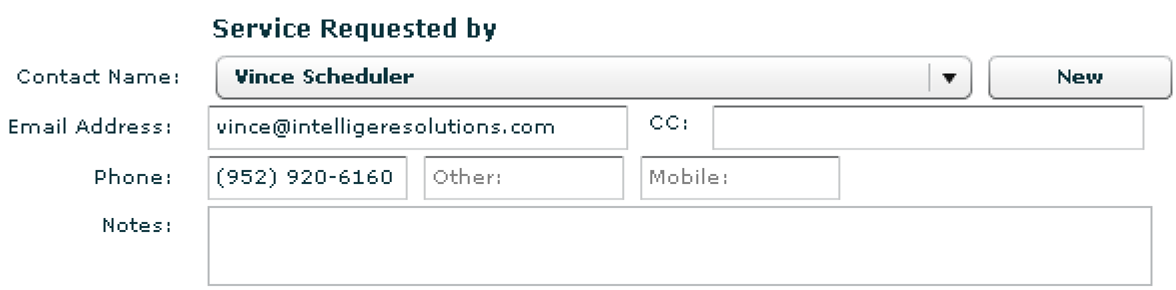
Service Details Field

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.

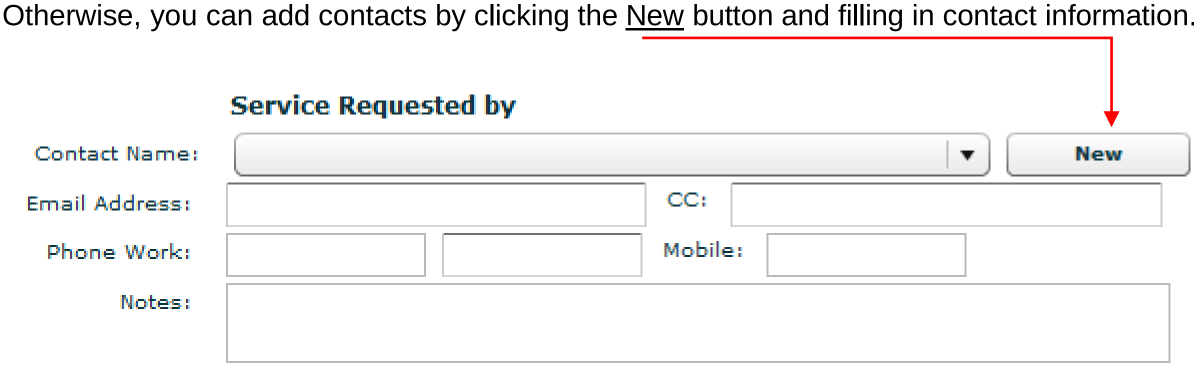


Requestor's Information

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.

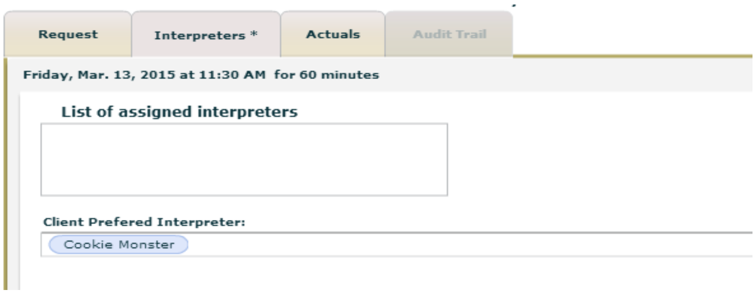


Otherwise, you can add contacts by clicking the New button and filling in contact information.



Requesting a Preferred Interpreter

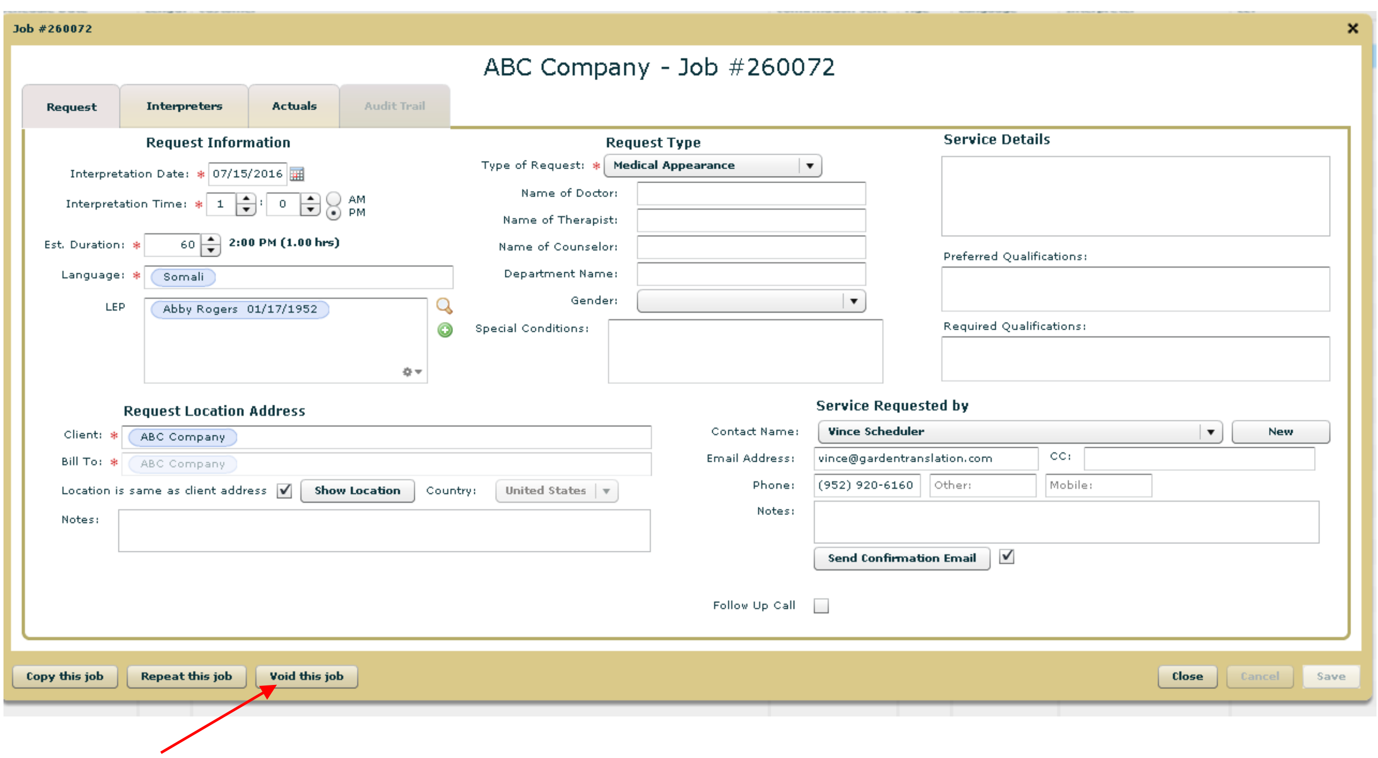
If you have a specific interpreter whom you would like for this request, click on the “Interpreters” tab and type the chosen interpreter’s name info the **Client Preferred Interpreter** box, when you begin typing, options will be shown to you, select the preferred interpreter.



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.



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

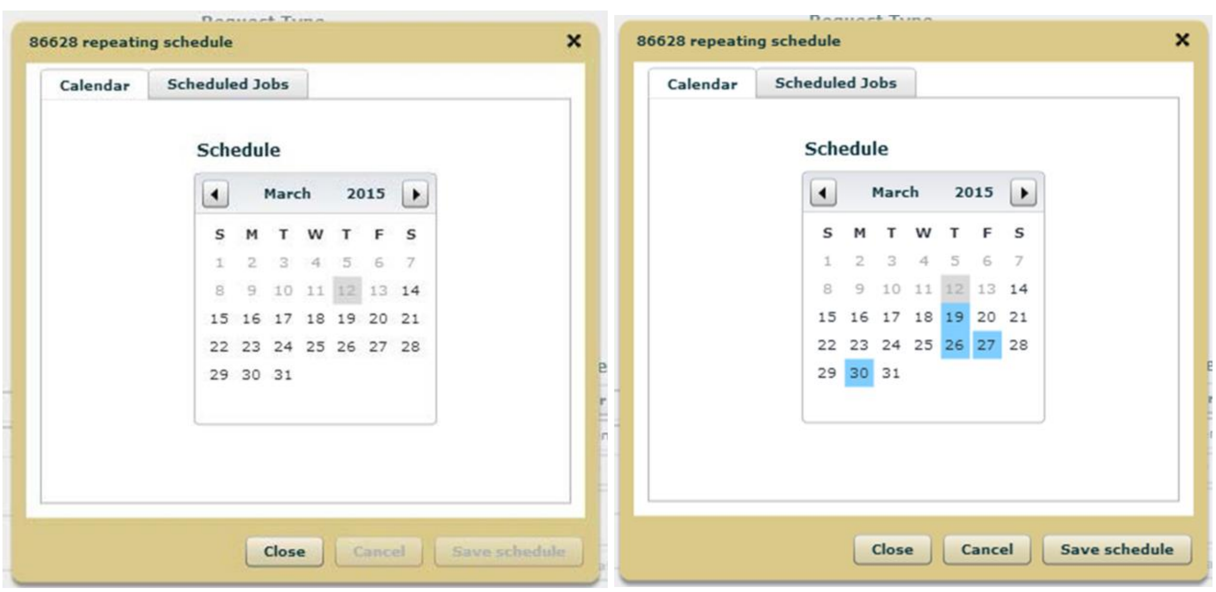
Creating a duplicate or multi-date Appointment

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.

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.