

Community Legal



Interpreter Bank

## **Step-by-Step Guide to Using Salesforce (<https://interpreterbank.force.com>) to Request an Interpreter**

### Getting Started

#### *Login Credentials*

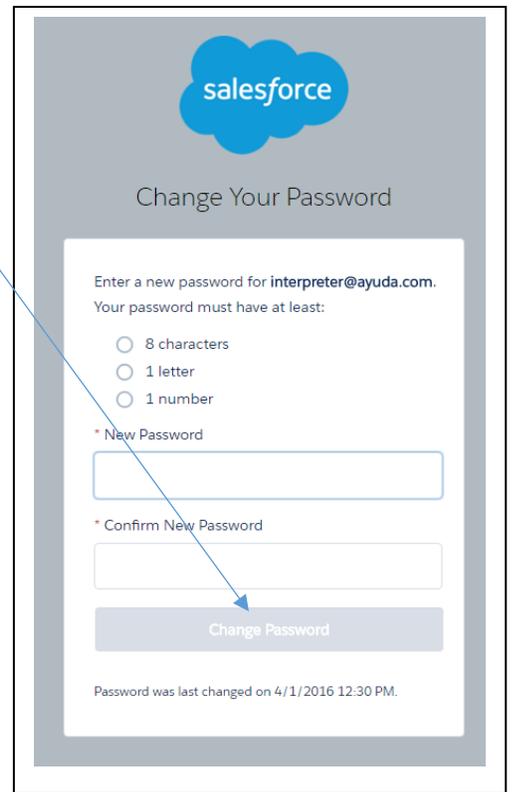
- Your username is interpreter@[whatever your organizational emails say after the @ sign].

EX:

- [interpreter@apalrc.org](mailto:interpreter@apalrc.org)
- [interpreter@law.edu](mailto:interpreter@law.edu)
- [interpreter@carecendc.org](mailto:interpreter@carecendc.org)
- Everyone at your organization will share the same username and password.
- The link to create a password will be emailed to your organization's liaison on or about April 3, 2017 by Salesforce in an introductory email.
  - Ayuda will email you to remind you which staff member at your organization is the liaison (If your organization already has access to Salesforce for submitting Victim Services Interpreter Bank requests, Ayuda will email you the name of your organization's current liaison who will have the login information).

- The introductory email will come from Ayuda Interpreter Community <dev-ayuda@echots.com> and the subject will be “Welcome to Ayuda Interpreter Community.”
- The introductory email will state the following:
  - Hi, Welcome to Ayuda Interpreter Community! To get started, go to [LINK]  
Username: [interpreter@\[your organization's email\].com](mailto:interpreter@[your organization's email].com)  
Thanks, Ayuda

- Your liaison should click on the link in the introductory email and create a password according to the listed guidelines and click on “Change Password.”
- Your liaison should share the password with anyone at the organization who will be submitting interpreter requests.
- Once the liaison clicks “Change Password” the system will open your dashboard.



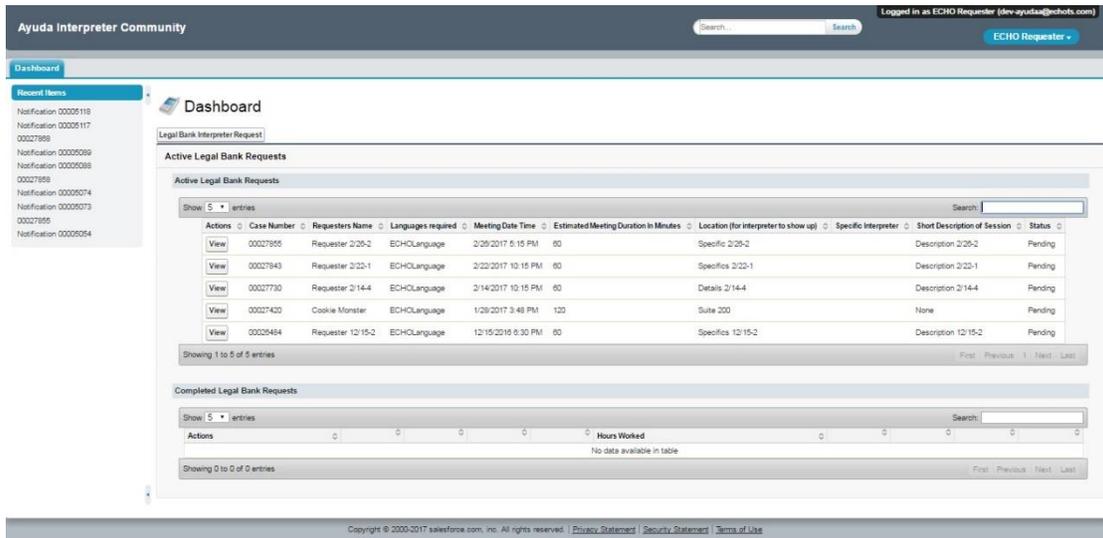
- In the future, to sign into Ayuda’s new interpreter scheduling system, please visit the following URL:  
<https://interpreterbank.force.com>

- If you ever need to reset your password, please use the “Forgot your Password” link on the sign-in page. If you continue to have problems, please contact Ayuda.

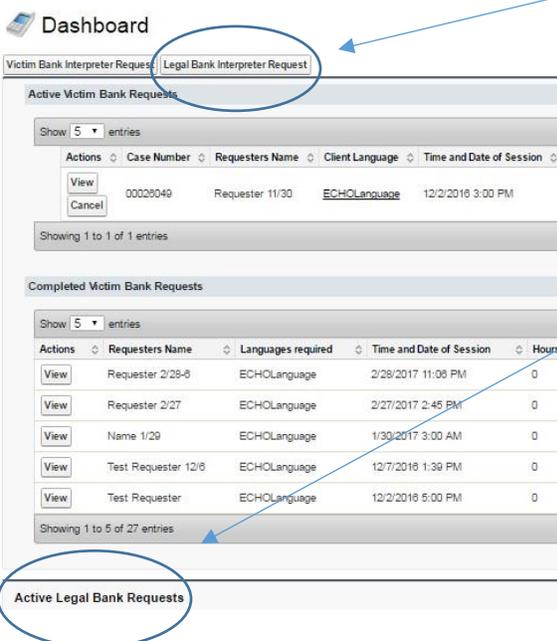
# Familiarizing Yourself with Salesforce

## Dashboard

When you log onto Salesforce you will be taken to your dashboard. On the dashboard, you will see a summary of interpreter requests that you have made and their statuses.

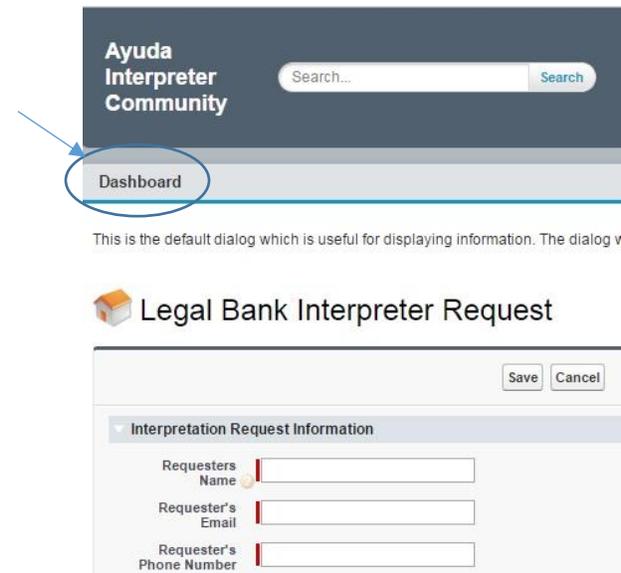
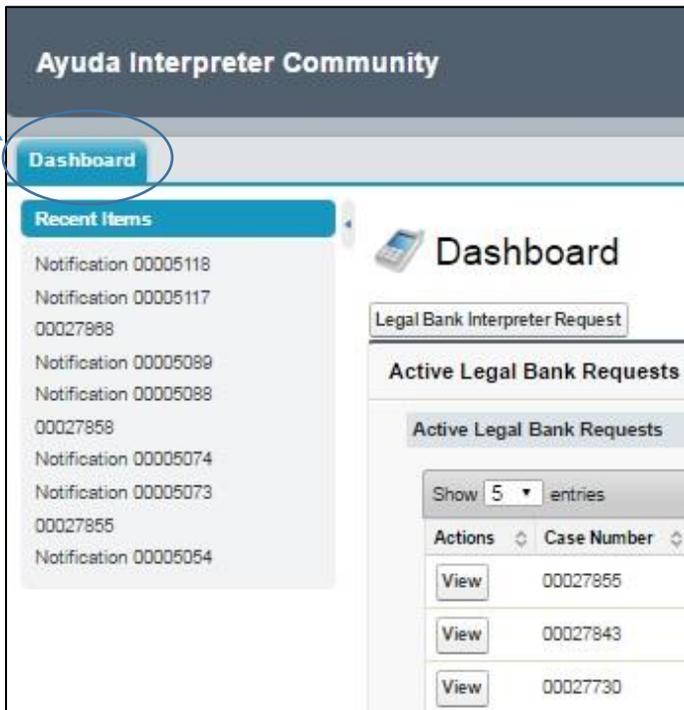


**Note:** Your dashboard will look different if your organization submits requests to the Victim Services Interpreter Bank, in addition to the Community Legal Interpreter Bank.



You will need to continue scrolling to see a summary of interpreter requests that you have made to the Community Legal Interpreter Bank.

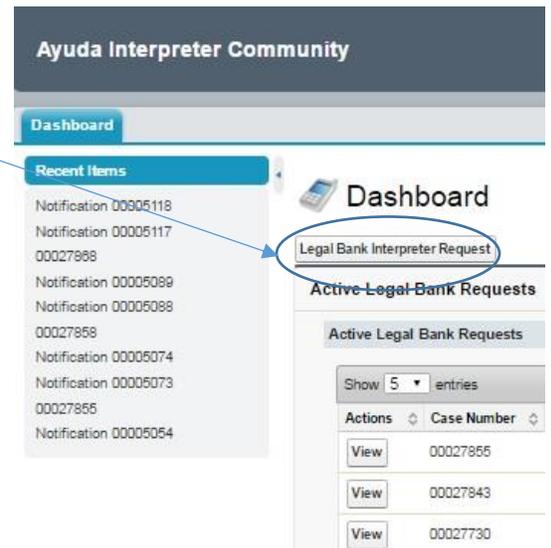
You can always reach the dashboard by clicking on the dashboard tab in the upper left corner of any screen.



### Submitting a request

From the dashboard, click on the interpreter request tab.

*Once you begin an interpreter request, do not click the back arrow on your browser. Any information you entered will not save.*



On the interpreter request form, hover over the question mark icons with your cursor to get further instructions about how to fill out the form:

The screenshot shows a portion of an online form. Fields include: Requester's Email, Requester's Phone Number, Requester Is On-Site Contact Person (checkbox), On-Site Point of Contact Name, On-Site Point of Contact Email, On-Site Point of Contact Phone Number, Specific Interpreter Gender(Optional) (dropdown menu with 'None--' selected), and Sight Translation Required? (checkbox). A yellow callout box with a question mark icon points to the 'Specific Interpreter Gender(Optional)' dropdown. The text in the callout box reads: "Not choosing specific gender will increase the chances that your request will be fulfilled." Other dropdown options visible are "Not Selected" and "Not Available".

Remember:

- Whoever is filling out the form is the “Requester.”
- The “On-Site Point of Contact” (OSPOC) is the person that the interpreter can call and/or email if there are last minute problems or difficulty in finding each other on the day of the assignment.
  - List appropriate email address and phone number for the OSPOC.
  - Provide a cell phone number if the OSPOC will be away from his or her desk at the start time of the appointment.

This screenshot shows the 'Interpretation Request Information' section of the form. It contains the following fields: Requesters Name, Requester's Email, Requester's Phone Number, Requester Is On-Site Contact Person (checkbox), On-Site Point of Contact Name, On-Site Point of Contact Email, and On-Site Point of Contact Phone Number. Each field has a question mark icon to its right.

The questions you will be asked regarding the eligibility of your clients is determined by our funding sources. If you:

- Receive funding to serve only D.C. residents, individuals with legal matters in D.C. or new client intakes, you will be asked the following:

What eligibility criteria category qualifies this assignment for the Bank's services?

The client/applicant is a DC resident.  
The client/applicant has a legal matter in DC.  
The assignment is an intake or first meeting (client/applicant's eligibility is unknown).  
None of The Above

- Receive funding to serve only Montgomery county residents, you will be asked the following:

Is the client a resident of Montgomery County?

Yes  
No

- Receive funding to serve Montgomery county residents, D.C. residents, individuals with legal matters in D.C. or new client intakes, you will be asked the following:

Is the client a resident of Montgomery County?

No

What eligibility criteria category qualifies this assignment for the Bank's services?

The client/applicant is a DC resident.  
The client/applicant has a legal matter in DC.  
The assignment is an intake or first meeting (client/applicant's eligibility is unknown).  
None of The Above

- Once you are done filling out the form, press "Save."

## Choosing (or not choosing) specific interpreters

Sometimes, you will have reason to want a particular interpreter to cover an assignment. You may use the system to give the assignment to a particular interpreter. **Only use this feature if you have previously confirmed the date and time of the assignment with that interpreter.**

On-Site Point of Contact Phone Number: (202) 256-7317

Language: ECHOLanguage

Specific Interpreter Gender(Optional): --None--

Specific Interpreter (only if pre arranged):

- Not Available
- Not Available
- ASL EchoInterpreter1
- Echo Interpreter**
- Interpreter1 Echo1
- Test Interpreter

Do you want to exclude any specific interpreter(s) from being notified?

Sight Translation Required?

If you use this feature, only the interpreter chosen will be alerted to the assignment.

Other times, you may decide that an assignment is not appropriate for a particular interpreter. You may exclude an interpreter(s) from the list of those who will receive notice of an assignment. This means that the interpreter will not know about the assignment and will not be able to accept the assignment.

- 1) Click on the button to indicate that you want to exclude an interpreter.
- 2) Select the interpreter you wish to exclude from the “Interpreters” box.
- 3) Use the “add” button to move them to “Excluded Interpreters.”

Do you want to exclude any specific interpreter(s) from being notified?

Exclude interpreter/s

Interpreters

- Not Available
- ASL EchoInterpreter1
- Interpreter1 Echo1

Add

Remove

Excluded Interpreters

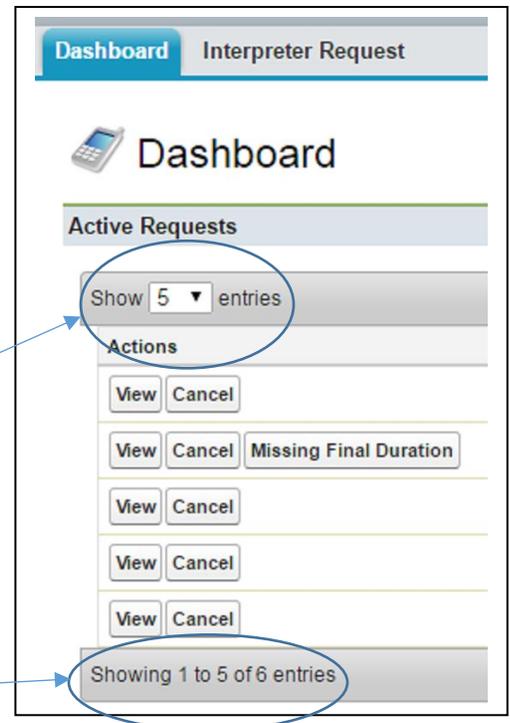
- Echo Interpreter
- Test Interpreter

Up

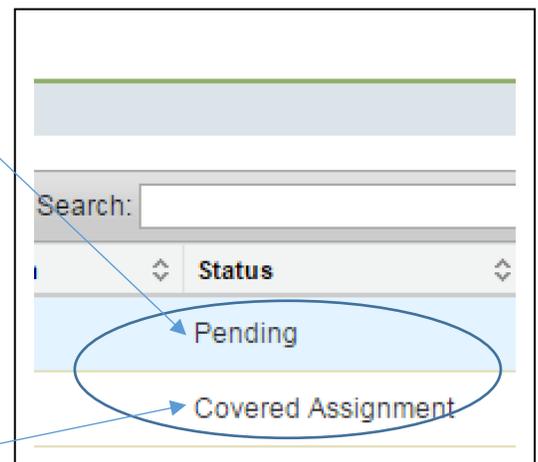
Down

## Checking on the status of your request

- Visit your dashboard.
  - You will see all of the requests that you have placed.
  - The dashboard is set to only show you 5 assignments at a time. You can change this setting to show you more assignments.
  - The dashboard will indicate how many total assignments you have (which will let you know whether some are hidden).

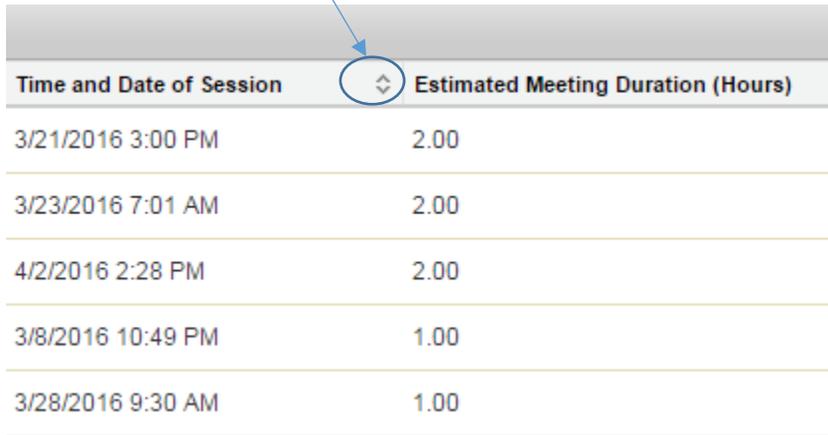


- If an active request has a status of “pending,” then you do not yet have an interpreter assigned to the case.
- Once an interpreter has been assigned to your case, you will receive a confirmation email to the email addresses that you entered for the Requester and the Point of Contact. In addition, the status of the case will change to “covered assignment.”



- Refer to your confirmation email for the interpreter’s name, phone number and email address.

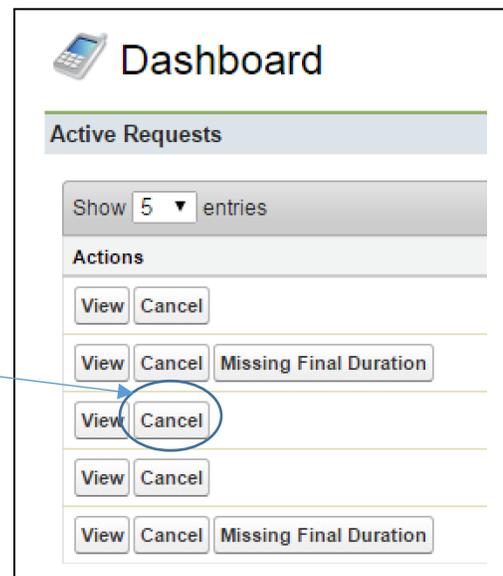
- You can organize your dashboard chronologically by the date of upcoming assignments. Simply click on the arrows to the right of “Time and Date of Session.”



Time and Date of Session	Estimated Meeting Duration (Hours)
3/21/2016 3:00 PM	2.00
3/23/2016 7:01 AM	2.00
4/2/2016 2:28 PM	2.00
3/8/2016 10:49 PM	1.00
3/28/2016 9:30 AM	1.00

### How to Cancel an Appointment

- Visit your dashboard.
- Find the appointment under “Active Requests.”
- Click the “Cancel” button.
- When asked, “Are you sure you want to cancel this request?,” click “OK.”
  - If the assignment was a “covered assignment,” an email will be sent to the interpreter, alerting the interpreter that the assignment has been cancelled.
  - Interpreters will be paid for assignments cancelled with less than 24 hours’ notice (48 hours’ notice for American Sign Language interpreters).



## How to Make Changes to an Appointment

- Visit your dashboard.
- Look in the “Status” column to determine whether the assignment is “Pending” or a “Covered Assignment.”
- For a “Pending” assignment:
  - Cancel the assignment (see instructions above).
  - Submit a new assignment with the revised date and time.
- For a “Covered Assignment”:
  - Contact the interpreter (using the contact information from the confirmation email) to see whether you can agree on a mutually agreeable date and time:
    - If so, send an email to [interpreterbank@ayuda.com](mailto:interpreterbank@ayuda.com) to alert Ayuda of the change. Copy the interpreter to ensure that everyone knows the new assignment date and time.
  - If you cannot agree on a new date and/or time:
    - Cancel the assignment (see instructions above).
    - Submit a new assignment with the revised date and time.
    - Interpreters will be paid for assignments cancelled with less than 24 hours’ notice (48 hours’ notice for American Sign Language interpreters).

### If an interpreter must cancel

- If an interpreter can no longer cover your assignment, you will receive an email alerting you to that fact.
  - The email will inform you that “Your assignment has been sent out to other eligible interpreters, and you will receive a confirmation email if any of them is available to accept the assignment.”
  - On your dashboard, the status of the assignment will have changed from “Covered Assignment” to “Pending.”
  - You must wait for another confirmation email and for the status to change back to “Covered Assignment” to know that an interpreter will be able to assist you on this assignment.

