Requestor Guide

CC Group Online Scheduling System
http://209.183.239.39/

Thank you for using CC Group's online scheduling system. This system will save time and money for both your organization and ours. The system empowers you to coordinate your own schedule for interpreting services. Go to http://209.183.239.39/ and log in as a REQUESTOR. Then, enter your log in and password; your log in and password are set by the CC Group coordination staff or by the client interface that has been set up for you.

NOTE: To save your time and energy, be sure to have Internet Explorer's Autocomplete feature turned on. To do so, in I.E., click on TOOLS, INTERNET OPTIONS, CONTENT, AUTOCOMPLETE, and be sure "Web addresses" and "Forms" are checked. Then, click OK until you're all the way out to the normal I.E. page. From now on, when you make a data entry, it will save what you've typed so you can simply select it from a drop down list when you start typing.

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OPENING PAGE:

LEFT FRAME: The main menu: Enter New Requests, View/Edit Requests & Confirmations, Cancel a Request, Locations, Deaf Consumer Information, Requestor Account Information, Deaf Consumer Schedule, Print Schedule, Messages (All), Email CC Group Coordination, System Help. These options will be explained through the rest of this guide.

RIGHT FRAME – A messaging system - this system has been created for you as a way to simply and easily exchange information. These messages are displayed only to those who are able to log into the system, which includes paying entities (clients), requestors, and deaf consumers. For example, if Maryland School for the Deaf (MSD) was a client and they wanted to get the word out about their homecoming game, they could simply put a message in this system and every client, requestor, and consumer who signs into the system would see that message.

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ENTER NEW REQUESTS:

Step 1 of 3: Each field name in the left column is a hyperlink that explains what each item means.

NOTE: Before starting the request, you should enter any new locations or deaf consumers by clicking on the appropriate link from the main menu on the left.

•   Choose Appropriate Billing Client Name: This is the name of the organization that is responsible for payment. Select from the drop-down menu. If for some reason the correct client name is not displayed, this might mean that your requestor login has not been associated to the Client Name for making requests and committing funds of this organization. Simply contact CC Group to be added to that client's list of approved requestors.

•   Choose Assignment Location: This section should include the name of the site, the street address, city, state, and zip code. If you do not see the selection you need, simply click "Look up/add location". This will open a new page of all of your locations to either search for the location you need or to add a new one. NOTE: Be sure to search for the address to be sure it's not already in the list under a different location name. Once you determine it's not in the current list, add the new location *with the appropriate client association selected*, then click SUBMIT. If there are no errors, close the newly opened window of locations and return to the original Step 1 of the request. IMPORTANT: Click the refresh button in your browser for that selection to appear.

•   Add Additional Directions/Info (once interpreter has arrived at the location): Please be as complete as possible by including a room number, floor number, and any special directions to help the interpreter find the exact location at the site.

• **Primary On-site Contact:** This name and number will allow the interpreter to contact someone on the day of the assignment at the location in case of an emergency, escort needed, or questions. This person will assist the interpreter in gaining access to a building or room. This person will also serve as an information contact should the interpreter assigned need more information.

• **Alternative On-site Contact:** The back-up contact should be the name and number of an individual that can be reached in case the Primary On-Site Contact is not available.

• **Mentorable Job?:** Please check this box if you would be willing to have a mentee co- interpret this job with a certified staff member. CC Group also trains up-and-coming interpreters or supports those who would like to specialize in a certain type of interpreting (i.e., legal or medical interpreting). Allowing a mentee to come will help foster filling the lack of qualified interpreter nationally and locally.

Dress Code:

- Recreational: shorts, jeans, T-shirts, sweatshirts, sandals, tennis shoes
- Casual: khakis or corduroys, jumpers, sweaters, polo shirts, casual dresses, loafers
- Business Casual: slacks, dresses, sweater sets, blazer, optional tie/jacket, open-toe shoes
- Business: slacks, dress, sports coat with tie, blouse and skirt
- Business Formal: suit with jacket, tie
- Formal: black tie wear, tuxedo, gown.

• **Budget Type:** This drop down is a list of budget types, if your organization uses them. You can also enter a code manually instead of or in addition to the drop down menu (i.e., select purchase order number from the drop-down list and then type in the appropriate P.O. number).

• **Deaf Consumer(s):** This drop down is a list of deaf consumers. Please supply the name(s) of all the Deaf participants at the assignment(s). This will better prepare the interpreter for the job. If the deaf are unknown then please select "Unknown" and update the information as soon as possible. You may add more than one deaf person using this field.

Once you've entered all of the fields on Step 1 of 3, click SUBMIT in the lower left corner of the data box. You'll be prompted to answer the question of whether or not you truly want to start a new request. If so, click YES.

Step 2 of 3: Add deaf participants

In this section, you will select each deaf consumer that will be attending this requested event. First select the deaf consumer's name and then their role from the drop down lists provided. The role is defaulted to "participant." Click ADD to add them to this request. Repeat this process for each deaf consumer attending. You will see a complete list in the second data box with the option of editing or deleting your selection with a link in the first column.

NEW DEAF PARTICIPANT: If you do not see the deaf participant listed in your drop down list, you'll need to add them. Click the red link ADD/EDIT/VIEW ALL DEAF CONSUMERS. This will open a new page that shows all of the deaf consumers you have access to in our system. The top box is a search feature. Search for the person's name. If they do not show up in the second data box of consumers associated to your log in, then input the information in the third data box and click ADD. Once you've added every deaf person needed for this request, close this new window, which should take you back to the original page where you were entering this request. NOTE: Press the REFRESH button on this page to get the new entries to show up in the drop down lists.

As a reference, here are some definitions:

•   <u>Deaf Consumer:</u> Please supply the name(s) of all the Deaf participants at the assignment(s). This will better prepare the interpreter for the job. If the deaf are unknown then please select "Unknown" and update the information as soon as possible. You may add more than one deaf person using this field.

•   <u>Deaf Consumer Role:</u> Please select if the Deaf Consumer is a participant, a presenter, or an observer.

Once you've added all the deaf consumers for this request, go down to click CLICK TO ADD DATE/TIME DETAILS in the Step 3 of 3 section.

Step 3 of 3: Add/edit assignment details

This is the last section. Input each field following the field description on the left.

•   <u>Date:</u> This section of the request form should be filled in with the date or series of dates for the assignment.

•   <u>Time:</u> The time section should be filled in with the starting time of the assignment and the ending time. If an assignment is less than 2 hours, a 2-hour minimum will show up on the confirmation. Please use military time.

•   <u>Description:</u> It's important to fill in this section to the fullest extent. For example, if the request is a meeting, please include topics that will be discussed and an agenda that can be followed by the interpreter, if possible. This will give the interpreter extra preparation time to better serve your needs.

Once completed, click ADD NEW INFO. If the request went through successfully, you will see your recently inputted data in the second data box below. At this time, you can continue to enter more than one day and/or time for this same request. The data you just submitted is still there to make it easier for you to add other dates/times. Simply change what is needed in the data (i.e., date or time) and click ADD NEW INFO again. You will again see the information below.

Once you are completely finished entering all the dates/times needed, click >>FINISHED ENTERING THIS REQUEST. This will take you to a thank you page that lists some reminders that you need to review (i.e., cancellation policy and confirmations protocol).

VIEW/EDIT REQUESTS & CONFIRMATIONS:

To view requests you've entered, you have two basic categories: Viewing pages and editing pages.

Viewing Pages: You can view 1. all valid requests (not cancelled requests and approved by CC Group once complete information is entered), 2. pending requests (not yet approved by the CC Group coordination as a valid request), or 3. Cancelled requests (all requests that have been officially cancelled by the CC Group coordination staff. Basically, your daily confirmation is the first selection of viewing pages – all valid requests. This will show you exactly where CC Group stands with filling your request.

Editing Pages: If an assignment is 5 or more business days in the future, you can change any field of the request, even billing fields (dates and times) If the request is less than five days in the future or an assignment in the past, you will be able to change almost all the fields in the request, except for billing related field (dates and times).

As always, if you can not figure out where you need to go, simply call or email the office for support.

CANCEL A REQUEST

If you have an assignment in the future that you need to cancel, simply click CANCEL A REQUEST from the main menu on the left. This will show a complete listing of all your valid requests to date with the ability to click to see the assignment details or to click and cancel the request. If you click to cancel, you will see a page with the assignment details. In the first data box, click on the button that says CANCEL THIS REQUEST and write any cancellation comments or instructions you'd like the CC Group coordination team to know. Then click SUBMIT. Someone from the CC Group coordination team will get your cancellation request and process the request per your instructions. NOTE: The cancellation policy of 48 business hours will apply and you will be charged accordingly.

LOCATIONS:

To view all locations associated to your log in, click LOCATIONS from the main menu on the left. As seen on other pages, you will see a page with three sections: a search section, a list of actual locations associated to your log in, and an add/edit section.

To search for a certain location, simply fill in as little meaningful information as needed in the top section.

To view all locations associated to your log in, simply look to the middle section. If you did a search, you will only see the results of your search. To remove the search, click CLEAR in the search box in the first data box. The list section in the second data box show some information about the location including the name of the location, the address, city and state, as well as the client name the location is associated to. Each location is associated to a client name. You will be able to see locations for every client name where you are listed as an official requestor. Note that if you have more than 10 locations associated to your log in, you will see a "1 2 3 of 3 Next Last" navigator to allow you to move between the different pages of location listings.

The third data box is to add a new location or edit an existing location. To add a new location, simply fill out the form in the third data box section. Be sure to choose a client name to associate the new location to and then click ADD. To edit an existing location, find the location in the list of locations in the second data box and click CLICK TO EDIT BELOW on the row of the location you want to change. Then make your changes in the third data box and click SUBMIT/CHANGE button.

DEAF CONSUMER INFORMATION

The deaf consumer link from the main menu operates just like the locations link does. The page has three sections again to search for a deaf consumer, view a list of deaf consumers associated to your log in, and to add/edit deaf consumer information. Simply follow the same instructions as were listed in the locations instructions.

REQUESTOR ACCOUNT INFORMATION

This link basically allows you to change any information listed in the CC Group system on you as an official requestor. To be listed as an official requestor for a certain client, either the CC Group office has to associate your requestor account to the

client, or the official contact for the client can go into the client interface at http://209.183.239.39/ to add you as a new requestor for them. You have the ability to change your first name, last name, email address, phone/tty/fax numbers, add general comments, and your login and password to your account.

DEAF CONSUMER SCHEDULE

This link from the main menu allows you to search all of your future requests to quickly pull up a certain deaf consumer's schedule. Realize that if your request has more than one deaf person listed on the request, you will see the request that number of times for each deaf person. This allows you ease of access to each deaf consumer's schedule in this section. Otherwise, you can use the VIEW/EDIT REQUESTS & CONFIRMATIONS link from the main menu to locate a certain request.

PRINT SCHEDULE

This link from the main menu opens a separate web page that allows you to choose a day that you would like to print a schedule for. When you select the right day from the calendar pop up icon or enter the date manually, click SEARCH. The results can be just viewed or printed. If you choose to print, be sure to print in landscape and change the margins to allow for maximum printing capability so as to not spill over onto another page.

MESSAGES (ALL)

These two links are related to the messaging board that you see when you first open the requestor interface. If you click on MESSAGES, you will see a section where you can enter a message you would like to make with again three sections: 1. search section to search the messages you've entered, 2. a list of messages you've entered, and 3. a section to add or edit your messages. Remember that these messages will be going out to every client, requestor and deaf consumer that has a log in into this system. Only enter messages here that you would basically want any deaf person or person who works with deaf consumers to read.

The ALL link basically shows you what you see when you first come into the requestor interface – a list of all messages.

EMAIL CC GROUP COORDINATION

This link opens a blank email addressed to the CC Group Coordination team based on the email default settings of your computer. If this link does not work because of your settings, you can also address an email to coord@yourccgroup.com.

SYSTEM HELP

If you experience any errors/problems or would like to make a suggestion on how to make this system more user friendly or useful, please click on the link in this section which will send an email addressed to support@yourccgroup.com. If you email defaults are not set up to do this, simply send an email addressed to that email address. Be sure to include all of the pieces of information requested on the page to ensure we can re-create the problem and address it.

Thank you so much for choosing CC Group and we look forward to working with you!

CC Gropu Management