

CLIENT INTERFACE
BIS ONLINE SCHEDULING SYSTEM

CLIENT LOG IN

Thank you for using the BIS online 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 www.bisscheduling.com and log in as CLIENT. Then, enter your log in and password provided by the BIS office.

NOTE: To save you 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 are all the way out to the normal I.E. page. From now on, when you make a data entry, it will save what you have typed so you can simply select it from a drop down list when you start typing.

OPENING PAGE

LEFT FRAME: As in other interfaces of the BIS' online system, the main menu is in the left frame: Maintain Requestors, Invoice Checking, Cancellation Tracking, Statistics, Messages: Read/Write, Billing Contact Information, Password & Login, Cost Estimate Tool, Send Email to BIS Coordination, System Help. These options will be explained through the rest of the guide.

RIGHT FRAME: The open page defaults to 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 a local deaf school 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 - many of whom are deaf individuals - who signs into the system would see that message.

One is able to view previous messages as well using the VIEW ARCHIVED MESSAGES link. In the grid, you'll see the message, contact person, and date the message is displayed. The email address is a hyperlink to allow you to send an email to that

person by simply clicking the link which starts your default email program on your computer.

MAINTAIN REQUESTORS:

This is a list of requestors associated to your master client. To view a listing of which client account each requestor is able to make requests under simply click on the link provided - [VIEW ALL REQUESTORS FOR ALL CLIENT ACCOUNTS UNDER YOUR MASTER ACCOUNT](#). Associating a client to a requestor will allow them to choose that appropriate billing client name when making a request.

You can choose to share one requestor account with several individuals, or enter each requestor separately. If you share an account, each person with that log in information will be able to see all requests made under that requestor log in. Or if you set up each requestor separately, they will only be able to see requests they alone have made, not any other requestor. The client interface is mainly to be able to monitor all requestor activity.

To add a person to your list of requestors, click “ADD NEW REQUESTOR” and follow the process it takes you through. Repeat for each requestor. Once the new requestor has been added, you can edit the information at any time by using the red “CLICK TO EDIT” next to each entry row. You can also associate a requestor you have listed to make requests for one of the other client accounts under your master client log in by clicking “CLIENT ASSOCIATIONS.”

INVOICE CHECKING

This allows the client to search for a specific request and find any need information about that request. One can also compare an invoice received with the information in the system.

The top section has a search option. You are able to search by the Request ID, Start and/or End Date, Description or Budget Item.

In the grid, you can see all the fields listed there. In addition, for each request that is shown, you may click the red DETAILS link in the REQUEST ID column to view all the details of that request.

CANCELLATION TRACKING

The top section has a search option. You are able to search by Request ID, Start and/or End Date, and Description.

The grid below gives information on recent job cancellations. The first column CANCELLED - STILL BILL/NOT BILL. This column is to let you know if your agency will still be billed for the request. It also allows you to see who cancelled the request, when it was cancelled, how many days notice was given, any reasons the person wants to give and general information about the request.

***** How much detail? Each one?

STATISTICS

Each of the categories listed are opportunities to search for specific information. All of the options request you to choose the Client Name, Start Date and End Date as search options. Client Name has a drop down list of choices associated with your Master Client log in. These are the statistic options:

- Deaf Consumer Hours Usage Statistics: Shows how many hours one individual deaf consumer used services during the specified period for the client name selected.
- DETAILED Consumer Hours Usage Statistics: Shows more details than the first link in that it adds cancellation statistics during the specified period for the client name selected.
- Budget Item Statistics: Shows how many hours a particular department or other identifying information you entered in the budget item field when making a request during the specified period for the client name selected
- DETAILED Budget Item Statistics: Shows more details than the first link in that it adds cancellation statistics during the specified period for the client name selected.
- Request Type Statistics: Shows the number of hours provided within a certain category of request type depending on what was selected when entering the request during the specified period for the client name selected.
- Request Notice Statistics: Shows the number of hours provided within the request notice period from you to the BIS office during the specified period for the client name selected.

- **Location Statistics:** Shows the number of hours provided at each different location selected when entering the request during the specified period for the client name selected.
 - **Total Hours Statistics:** Shows the total number of hours of services provided for each client account under your master client log in Shows the number of hours provided within the request notice period from you to the BIS office during the specified period for the client name selected.
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MESSAGES: READ/WRITE

This link is related to the message board you see when you first open the Client Interface. If you use the WRITE link, this gives you 3 sections. You can search for past messages you entered using a keyword. The next section shows previous messages you have added to the board. The last section is for adding a message. Under Add/Edit a message, there is a box to type the message you want to add to the message board. You can choose the date you would like it to begin. The date is automatically set for today, but you may choose a date in the future for the message to start. Next, you set the date you want the message to expire or drop off of the message board. Then you just enter yourself as the contact person or whomever would be able to answer questions about the message.

If you click the READ link from the main menu, you will see the message board. These are any current messages for any and all clients to see. You also see a search by keyword, if you wanted to look for a specific message.

On the READ page, there is an option to View Archived Messages. This link will show all expired messages that have been on the message board. There is also an option to search by keyword for a specific message.

BILLING CONTACT INFORMATION

This list includes all of the clients under you master log in. To the left of each client name, you can click the red Client ID and view the billing information under that client. You may edit that information at any time. Be sure to click the SUBMIT button at the bottom of the information to make any changes. Clients are either entered by the BIS office or you may enter a new client from the main page at www.bisscheduling.com and an automated email is sent to the coordination area. It's

best to coordinate with the office as to what the best method would be to add a new client to your master log in.

PASSWORD AND LOGIN

This screen allows you to edit your log in and password to your master client login. Be sure to click SUBMIT button to make any changes.

COST ESTIMATE TOOL

This tool provides an ESTIMATE for a request you have made or may be making. Click the red Client ID number to the left of the Client Name. Then fill out the information about the request. Then click Calculate Cost. The field that says Total Interpreting Cost will give you an estimate for the cost of the request you have entered.

Remember, there are some exceptions listed under Other Type. If you would like to make changes to the estimate, you may make the changes and click Re-calculate if changes are made. This will give you a revised estimate. This cost estimate is based on rates in our system listed for that client name you selected.

SEND E-MAIL TO BIS COORDINATION

This link will use your default e-mail system to open a window with the BIS Coordination e-mail address. You may use this for questions, problems, suggestions or information you may need to send in addition to the request. Such information may be agendas for meetings, special requests, site information or identification letters the interpreter may need to get into your site. You can also address an e-mail to BISCoord@bisworld.com.

SYSTEM HELP

This screen will give you instructions on how to report problems with the website to the webmaster. When you click the link in red that says BIS System Developer, it will use your computer's default e-mail system to open a window with the e-mail address for the webmaster. You may then give all of the information needed to address the problem you have experienced. You can also address and e-mail to



Video Relay Service ▪ www.BISVRS.com

A Deaf-Owned, Small Minority Business Enterprise GSA # GS-10F-0468M ▪ Cage Code # 07EZ8

webmaster@bisworld.com. We are always open for suggestions, so please use that link for those, too!

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

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