



SUGGESTIONS FOR AN INTERPRETER ONLINE SCHEDULING SYSTEM

Overarching concerns

L&I will have to decide whether it leases or buys a software system to schedule and pay interpreters. Everything therefore hinges on the software system it will choose.

All state appointments should be posted on a virtual appointment board completely separate from any other appointments the coordinating entity may have in the course of their regular business.

There should be a dedicated website and a dedicated scheduling system devoted exclusively to state paid interpreter services.

All state requests should have consecutive numbers.

The system should not offer appointments that have not been pre-approved by the State.

Implementation

L&I should consider whether it wants a hard or a soft implementation. A soft implementation is always better.

Keep an eye on when the contract with the scheduling entity is signed. For example, ULS contract was signed on June 6 and the scheduling system went live on July 1.

There should be ample time between registration of interpreters and requesters in the online scheduling system and the date the system goes live.

Steps

1. Requester places the order
2. System verifies eligibility
3. If eligible, system posts the request on the virtual appointment board
4. Interpreter reviews the appointment offer
5. Interpreter accepts the appointment offer (contract)
6. System generates a work order
7. Services are rendered or not
8. System determines whether the work order merits payment
9. If billable, system generates an invoice
10. Interpreter reviews and approves the proposed invoice
11. System sends invoice to payer
12. Payer issues payment
13. System deposits payment in the interpreter's bank account

1. Off-the-shelf v. custom software

The software system should be specifically designed for scheduling and managing interpreter services. In essence, this is an appointment booking software to which other modules (e.g. automated invoicing, payment processing, third party eligibility, complaints tracking) can be added.

While CTS had designed its software from scratch to meet their interpreter services' needs, ULS bought an off-the-shelf software package called salesforce that was originally designed to track customer relations and sales leads follow-up.

2. Ownership of data

All data from the scheduling system should be the property of the State and subject to public disclosure. Scenario: what happens when the state changes vendors?

3. Oversight and review through the generation of customized reports

Online scheduling systems collect huge amounts of data that can be used to generate reports in Excel spreadsheet formats. Data analytics software such as Microsoft Power BI can then pin point specific problems or easily calculate fill rates to comply with USDOJ requirements.

Power BI link

<https://app.powerbigov.us/view?r=eyJrIjoiaWw4MDIwNzctMmFkNy00N2EyLTKyODQtM2QyODAwZjUzNWxIiwidCI6IjExZDBIMjE3LTl2NGUtNDAwYS04YmEwLTU3ZGNjMTI3ZDcyZCJ9>

For a list of all the necessary data fields in order to accurately calculate fill rates and make informed decisions during bargaining negotiations, please see Appendix A.

Each data field label needs to be accompanied by its definition with a detailed explanation of what kind of information you are seeking. Mention bad example of requester [''] and [null null].

Fill rate calculation: The system should have a data field called "request status" to help calculate the fill rate by language and by county.

Total Requests = Filled Requests + Unfilled Requests

Fill Rate (%) = Filled Requests/Total Requests

Request Status	Fill Rate Calculation
Unable to Fill	Unfilled
Returned Not Filled	Unfilled
Filled	Filled
Returned Filled	Filled

Contract usage analysis: The system should have a data field indicating for "appointment status" as follows:

- Completed (billable)
- Cancelled (not billable)

- By LEP
- By provider
 - Rescheduled
 - No interpreter found
- Late Cancellation (billable):
- No Show
 - Interpreter (not billable)
 - LEP (billable)
 - Provider (billable)

4. Flexible design

The software system needs to be flexible enough to allow for different hourly rates, different types of appointments (e.g. one-on-one, block time), uploading of travel expenses receipts (e.g. parking, tolls), lumping of appointments (e.g. adding more patients in the same date and location to an appointment already assigned to an interpreter), different hourly rates for different languages, mileage reimbursement, variable percentage calculations for late cancellations/no shows, etc. All these items need to be programmed eliminating the need for manual changes.

The software system should be able to abide by any CBA that may be negotiated. The ULS systems, for example, does not have the capacity to automatically calculate late cancellation payments (50% and 75%) which necessitates staff to fix them manually and triggers numerous interpreter emails and eventually grievances with the Office of Financial Management.

5. Paperless system.

Electronic:

- Appointment offers,
- work orders,
- check-in and check-out process; and
- automatically filled invoices (no paper invoices to upload).

Ability for interpreters to print work orders and invoices.

Ability for providers to adjust start time (e.g., interpreter, doctor and patient start earlier than scheduled start time).

Ability for interpreters and providers to sign invoices electronically. The system should be able to keep on file any modifications made by interpreters

or providers. Once the interpreter approves the invoice, providers should not be allowed to edit it.

The system should allow interpreters to submit modifications electronically before sending the invoice to payment processing. (dispute invoice button)

The system should allow interpreters to review the electronic invoice before it sends it to accounts receivable.

Invoice disputes should all be done electronically on the system (no emails, please).

The system should track invoices and payments as follows:

- Not billable
- Invoice disputed by interpreter [date stamp]
- Invoice approved by interpreter [date stamp]
- Invoice submitted to the State [date stamp]
- Payment issued by State [date stamp]
- Interpreter paid [date stamp]

L&I needs to decide whether invoices will be batched for payment processing or processed individually. Either way, the software system should be able to track invoice processing and payment processing with pre-set timelines.

The system should notify interpreters of expected timelines for invoice processing and payment processing.

Invoicing and payment timelines must be clearly spelled in the contract between the State and the scheduling company and reflected in the software system.

6. BOT prevention

If the scheduling is a piranha pool system, then it needs a CAPTCHA every time the interpreter accepts the appointment offer.

If the scheduling is availability based, bots can only be programmed to alert of impending appointment offers.

The scheduling system should only be accessible from one electronic device at a time.

7. Mileage calculations

The system should be able to interface (API) with Google Maps, Mapquest, so that calculates mileage based on driving directions not on bird's eye view (e.g., air flights).

The system should be flexible to calculate:

- Roundtrips to/from interpreter's home
- One-way trips to/from interpreter's home
- Between appointments

Appointment offers should always display one-way mileage from the interpreter's home.

The system should have the ability of tracking interpreters in real time based on the interpreter's online calendar.

8. Interpreters' credentials (including immunizations and/or criminal background checks)

The system should:

- track credentials' expiration date;
- notify the interpreter of imminent contract termination due to credential expiration; and
- automatically dis-enroll interpreter from the scheduling system upon confirmation of expired credential.

9. Maximizing interpreter usage

Default calculation of hours should be 60 minutes. For example, start time 1:00 pm and end time 1:59 pm instead of 2:00 (61 minutes).

Allow interpreters to accept back-to-back appointment provided the appointment location is the same.

Allow interpreters to view overlapping appointments but with a double booking prevention algorithm (not a buffer time).

There are two types of double booking scenarios:

1. two interpreters accepting the same appointment
2. one interpreter accepting two appointments

Allow the requester to override the double-booking prevention when the interpreter is already at the location, ends an appointment early and the provider can assign another appointment to the already present interpreter.

Ideally, the system should not offer appointments for dates and times interpreters' calendars are already booked.

The system should automatically upload accepted appointment offers (work orders) on the interpreters' online calendars.

The system should alert interpreters by email and/or text message of:

- Cancellations
- Modifications to the appointment offer that triggered the creation of a new appointment offer

The software system should have the ability to block some or all appointments. For example, interpreters can't:

- see healthcare appointments unless they have the flu shot but still can see social services appointments
- see appointments on Tuesdays
- see any appointments unless they are urgent appointments
- see appointments beyond 30 miles
- see appointments during vacation blackout dates

The software scheduling system should be accessible from mobile devices through a dedicated application.

10. HIPAA considerations

The appointment offer should not include:

Patient's name, L&I claim number, date of birth, date of injury, phone number, address (unless home visit), medical record number.

The work order should not include:

Patient's date of birth, date of injury, phone number, address (unless home visit), medical record number.

The invoice should not include:

Patient's date of birth, date of injury, phone number, address (unless home visit), medical record number.

The appointment offer should have a data field explaining the type of appointment the interpreter is being offered. For example:

- Home visit
- Office visit
- Outpatient procedure
- Physical therapy
- Vocational rehabilitation services

- Pain management
- Psych visit
- Psych evaluation
- Work conditioning/hardening
- Physical capacity evaluation
- Occupational therapy
- Massage Therapy
- Ultrasound

11. Interpreters' payment history

The system should track, and not delete, all invoices and pay sheets for each interpreter.

The system should allow interpreters to access online and if necessary print all invoices and paysheets.

The system should allow interpreters to access pending invoices and track payment processing steps.

12. After hour support

- 24/7/365 IT support. Mention the New Year crash.
- 24/7/365 customer service support (e.g., on-call rotations).

There should never be updates, tests or maintenance to the system during high peak hours and days. Mention the Wednesday morning DEMO crash.

13. Preferred interpreter feature

The system should have the ability for the requester to ask for a specific interpreter based on whatever policy L&I may have (e.g. gender, medical necessity).

14. Disaster plan

Mention the snowstorm in Vancouver.

Notify interpreters by email and/or text message of special circumstances (e.g., inclement weather, bridge collapse, system test).

Notify providers of special circumstances and provide instructions about how to handle massive interpreter no shows.

Allow providers to notify system of facility closure.

System should allow interpreters to alert the system of facility closures.

15. Ability to service urgent appointments

System should categorize appointments as follows:

- Regular
- Next 72 hours
- Next 48 hours
- Urgent

Algorithm should decide which is which. If it is an availability based scheduling system, the system casts a wider net depending on the category of appointment.

16. Union dues collection

The system should be able to process and track (YTD) union dues, deductions and insurance premiums.

The system should be able to provide a report of the union dues, deductions and insurance premiums globally and for each interpreter.

APPENDIX A

Appointment/ job number	Consecutive numbers Any change in date, time, location or LEP triggers the creation of a new request
Requester's first and last name	
Requester's phone number	
Requester's account name	
Requester's account number	
Date and time of request	
LEP ProviderOne number if applicable	
Claim number if applicable	e.g., L&I claim number
Payer	State agency responsible for payment
Language	Drop down menu
Date of Service	
Scheduled start time	
Scheduled end time	
Appointment location name	
Appointment location	Number, street, city, zip code, state
Appointment location county	
Appointment location subdivision	Suite number, building name, floor, etc.
Request status	<ul style="list-style-type: none"> • Unable to fill [date stamp] • Returned not filled [date stamp] • Filled [date stamp] • Returned filled [date stamp]
Type of appointment	<ul style="list-style-type: none"> • Home visit • Office visit • Outpatient procedure • Physical therapy • Vocational rehabilitation services • Pain management • Psych visit • Psych evaluation • Work conditioning/hardening • Physical capacity evaluation • Occupational therapy • Massage Therapy • Ultrasound
Check-in time	
Actual start time	
Actual end time	
Appointment status	<ul style="list-style-type: none"> • Completed (billable)

	<ul style="list-style-type: none"> • Cancelled (not billable) <ul style="list-style-type: none"> ○ By LEP [date stamp] ○ By provider [date stamp] <ul style="list-style-type: none"> ▪ Rescheduled ▪ No interpreter found • Late Cancellation (billable) [date stamp] • No Show <ul style="list-style-type: none"> ○ Interpreter (not billable) ○ LEP (billable) ○ Provider (billable)
Interpreter first and last name	
Interpreter ID number	Vendor number
Travel expenses amount	\$ tolls, ferry, parking
Number of miles	
Mileage amount	\$
Number of units billed	15 minutes increments
Services amount	\$
Payment status	<ul style="list-style-type: none"> • Not billable • Invoice disputed by interpreter [date stamp] • Invoice approved by interpreter [date stamp] • Invoice submitted to the State [date stamp] • Payment issued by State [date stamp] • Interpreter paid [date stamp]