MERFi

MOBILE, EASY, RELIABLE, FAST INTERPRETING

ADMIN GUIDE FOR MICRO CALL CENTERS

Table of Contents

Prerequisites

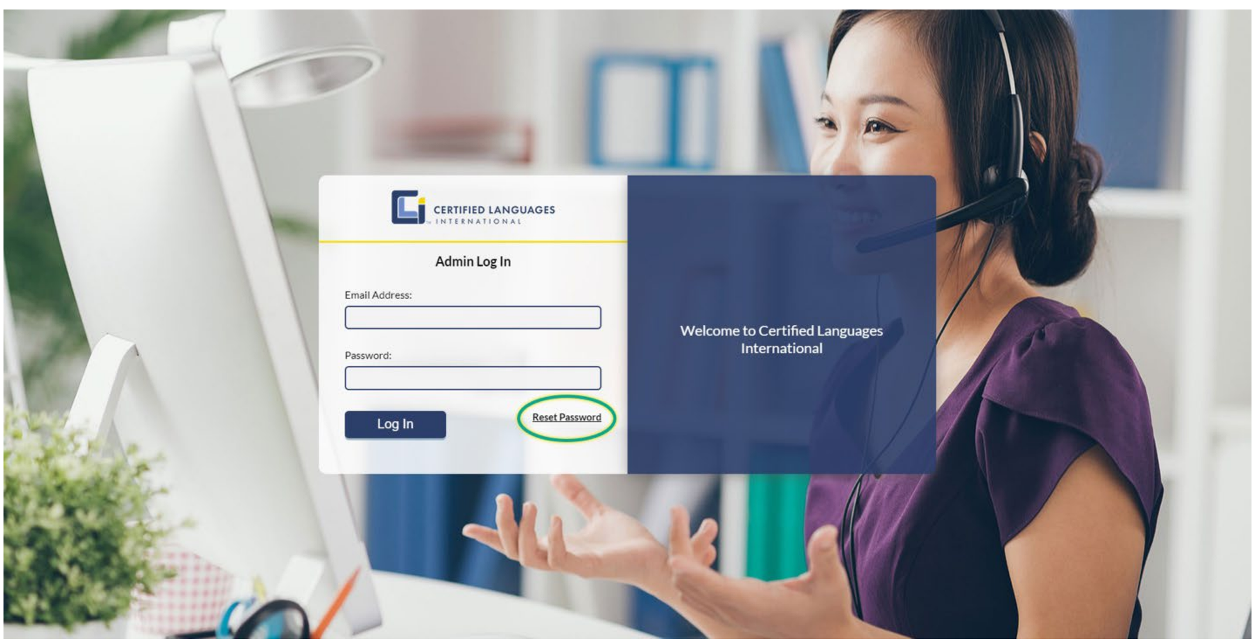
- Executed service agreement, including micro call center addendum/amendment
- Confirmed VRI account in CLI's system
- Confirmed admin account in MERFi
- A temporary password to log in
- Minimum Requirements document reviewed and accepted
- Visit the MERFi Admin Support Hub for additional documents and FAQs, https://certifiedlanguages.com/support-hub-for-admins/.

Section 1: Changing Your Password

Your CLI representative will give you a temporary password to log in. We recommend you change your password as soon as possible.

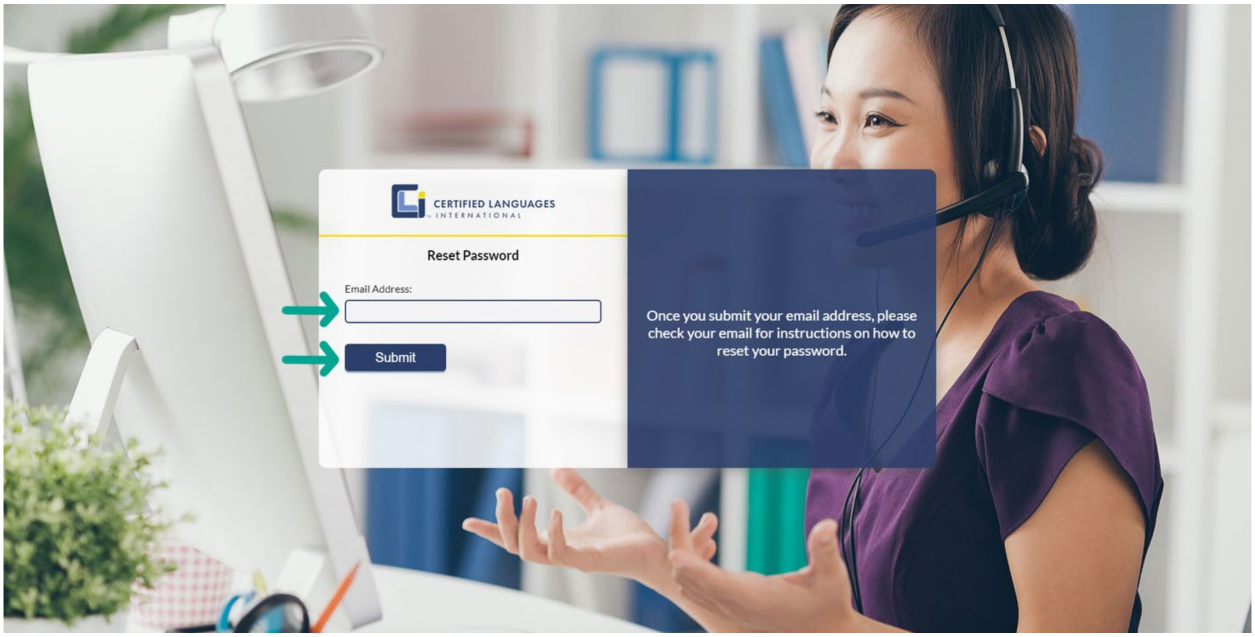
To change your password:

- Visit the MERFi "Admin Log In" page.
- Click **Reset Password**.

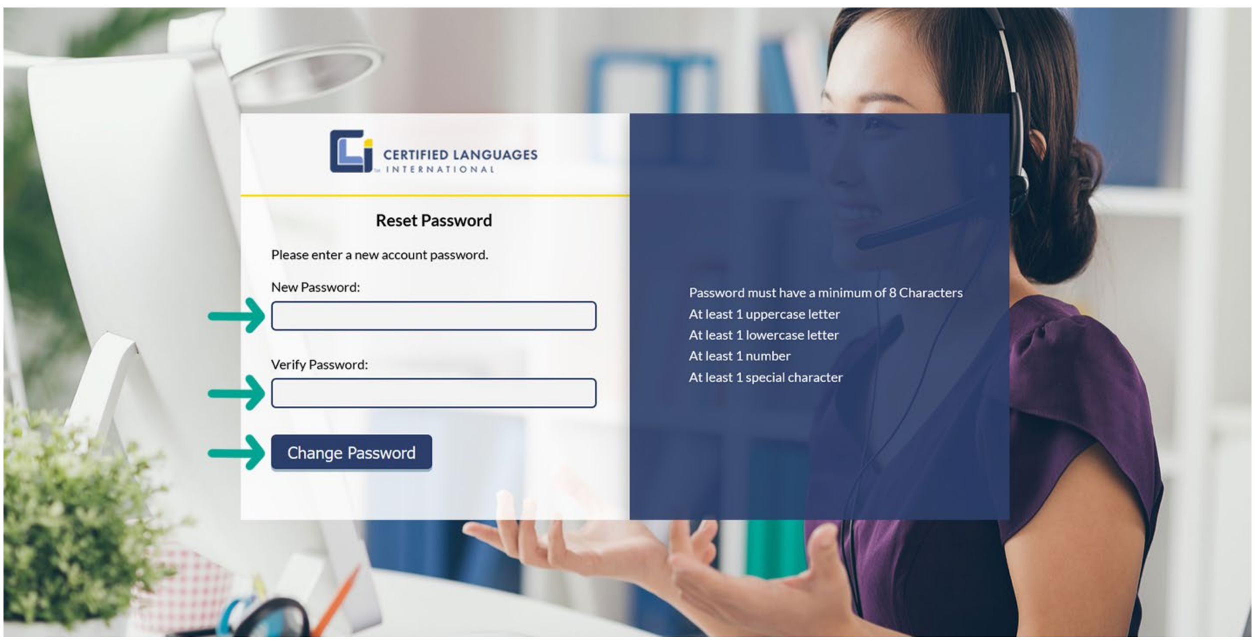


- Enter your email address, and click **Submit**.

- You will receive an email from DoNotReply@certifiedlanguages.com with the subject "Forgot Password Notification."
- Click the link in the email to reset your password. You'll be directed to a new page.

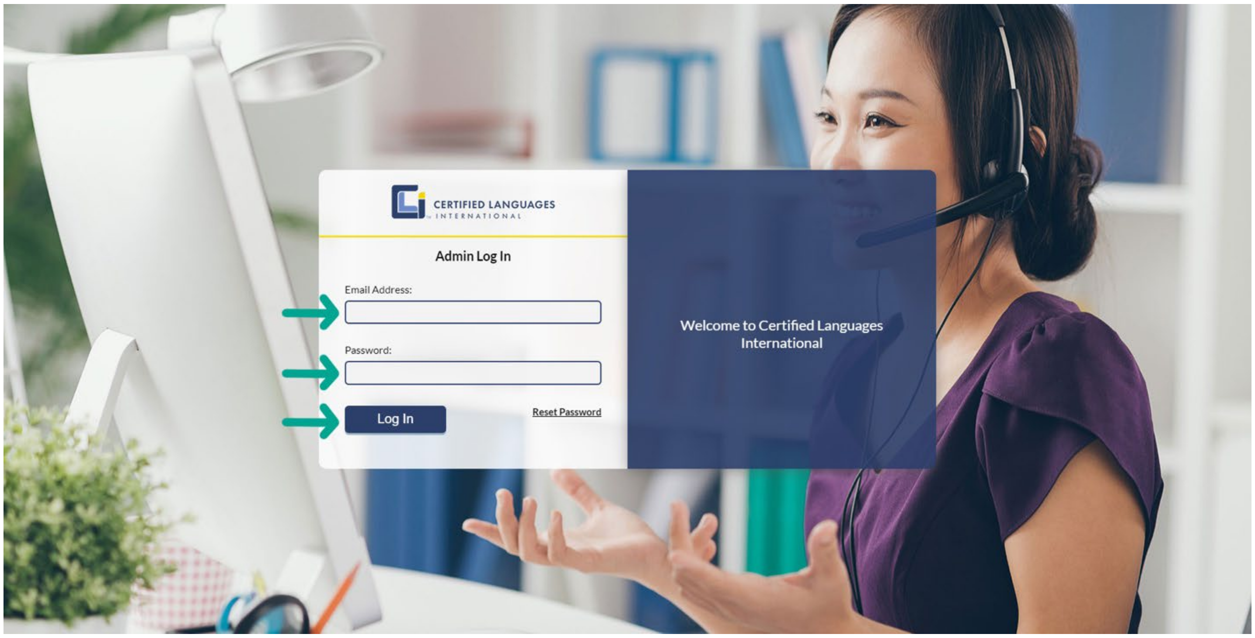


- Type your password in the **New Password** field. Repeat password in the **Verify Password** field.
  - **Note:** Password requirements are located to the right.
- Click **Change Password**.

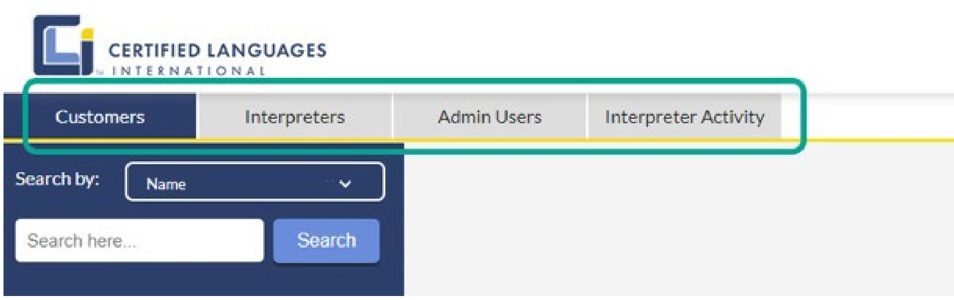


Section 2: Logging In

- Visit the MERFi “Admin Log In” page.



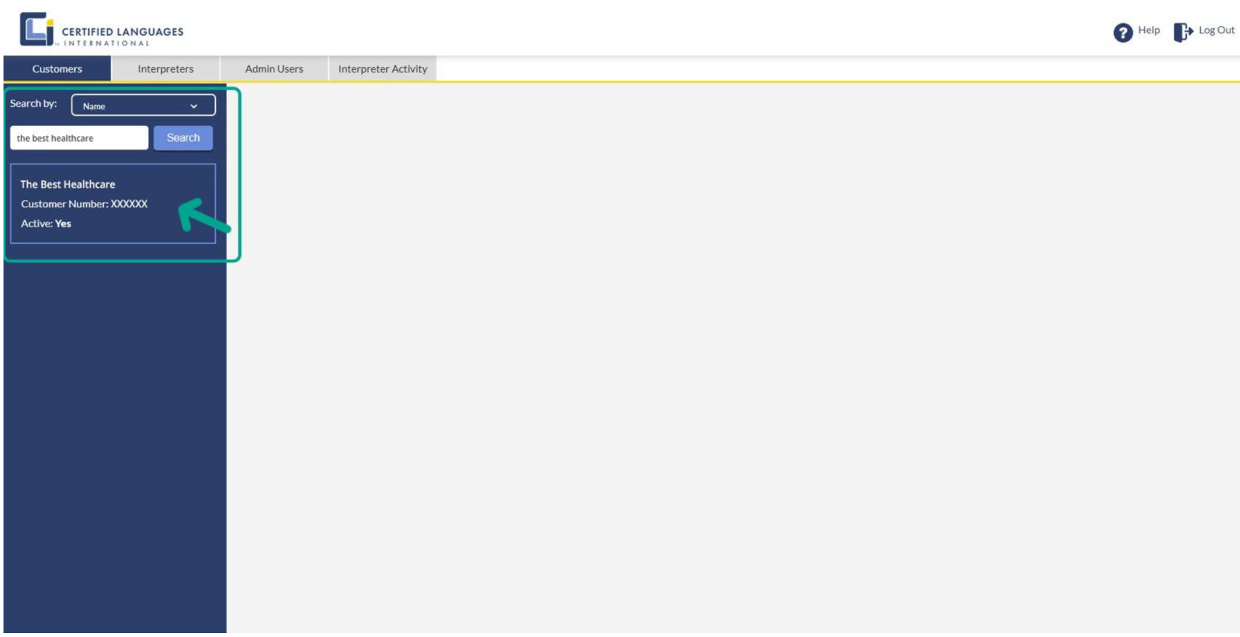
- Log in with your email address and password.
- Once logged in, your home screen will display the following tabs: **Customers**, **Interpreters**, **Admin Users**, and **Interpreter Activity**.



Section 3: Customers Tab

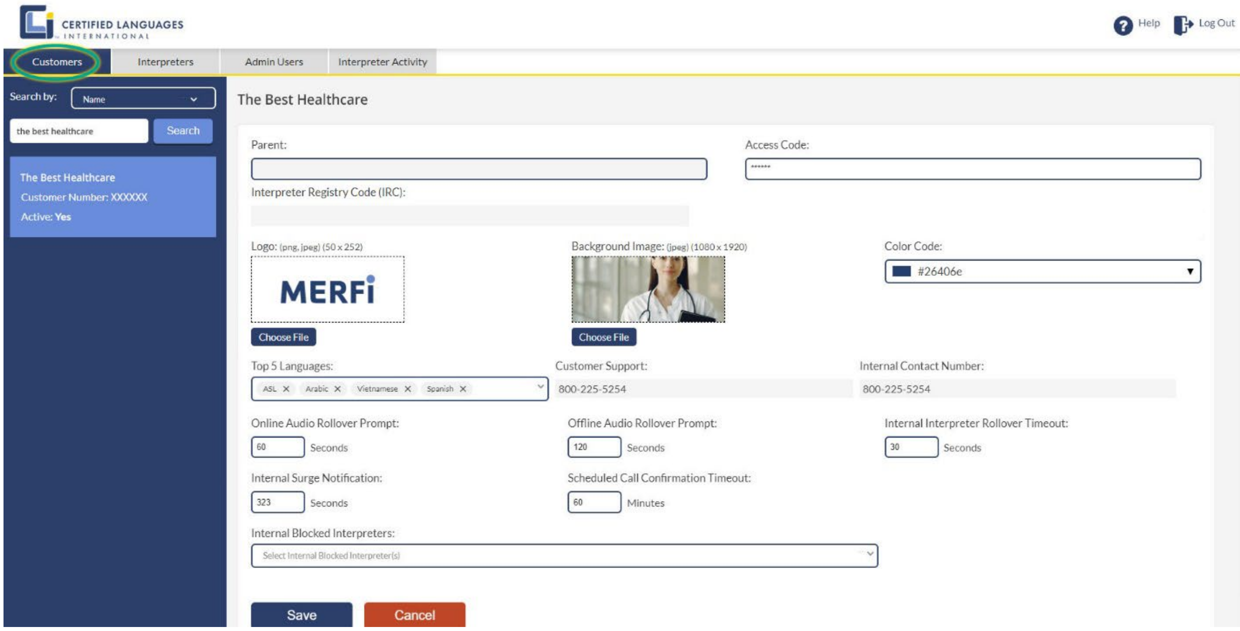
Search and view main accounts and child accounts (if applicable) under the **Customers** tab.

- Click on the **Customers** tab.
- To search for a customer or group of customers, select **Name**, **Parent Name**, or **Customer Number** under the “Search by” dropdown.
- Enter search criteria in the “Search” pane, and click **Search**.
  - **Note:** Please make sure your search criteria are spelled correctly. Your results may not return if there are misspellings.
- Click on the applicable result to display customer profile details.



Customer Profile Settings

The customer profile displays customer information and settings.



Parent

The **Parent** field is preset in CLI's internal system. It cannot be changed without contacting your account representative.

Interpreter Registry Code (IRC)

The **Interpreter Registry Code (IRC)** is present in CLI's internal system. It cannot be changed without contacting your account representative.

The registry code is for organizations that are required to follow state-specific legislation to prioritize connections with interpreters holding specific certifications. When populated, it will display the certification code that ensures CLI's system is prioritized certified or qualified interpreters specific to your legal requirements.

Access Code

- To change the **Access Code** for your account, enter your desired code in the field, and click **Save**.
- Verify if the updated **Access Code** can be used to log in to the customer portal.
    - **Note: Access Codes** are alphanumeric and case sensitive. They need to be a minimum of 6 characters.

> Changing your **Access Code** will change it for your entire division or organization, and you will need to redistribute it to your staff before they can use MERFi again.

Logo

- To add your organization's **Logo**, select **Choose File**.
- Select the desired logo from your computer.
- Once your logo is uploaded, click **Save**.
- Verify if the **Logo** updated by logging in to the user portal.

<u>Logo must be:</u>

- PNG or JPEG
- Size: 250 pixels x 50 pixels
- High resolution (recommended)

Background Image

Your **Background Image** is displayed on the login and billing screens of the user portal.

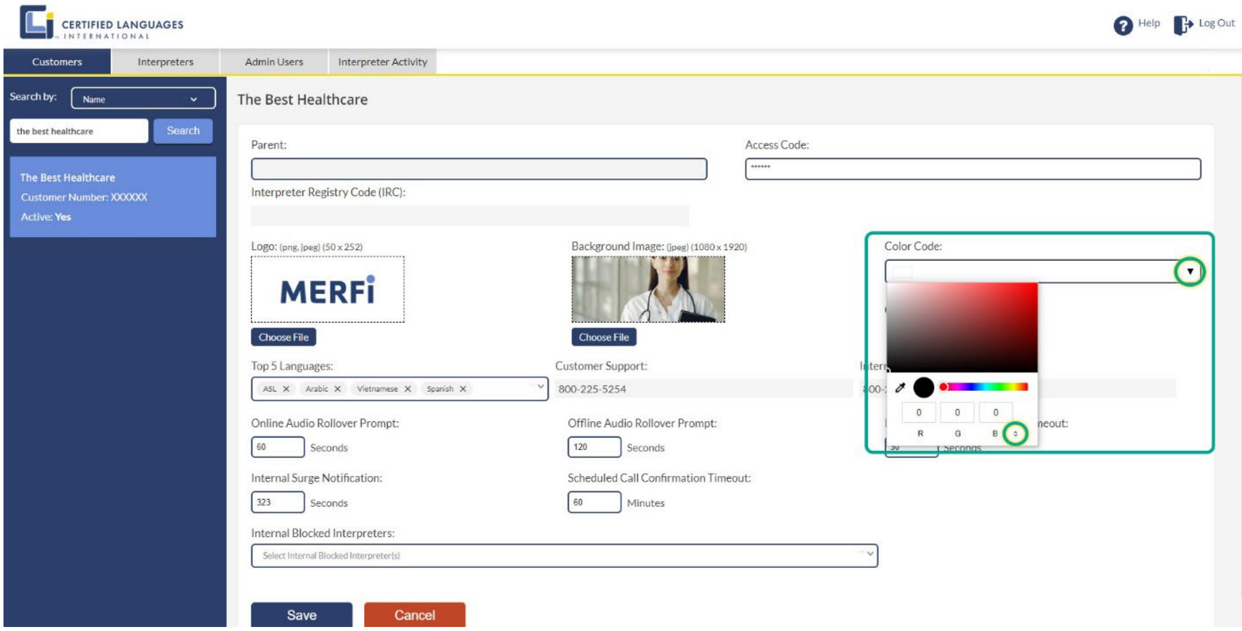
- To upload a background, click **Choose File**.
- Select the desired image from your computer.
- Once your background image is uploaded, click **Save**.
- Verify if the **Background Image** updated by logging into the user portal.

<u>Background image must be:</u>

- JPEG
- Size: 1920 pixels x 1080 pixels
- High resolution (recommended)

Color Code

The **Color Code** changes the accent colors on the MERFi user portal. This includes icon and button colors.



- To change your accent colors, click the dropdown on the **Color Code** menu.
- Select your desired color one of two ways:
  - Use the color slider to select the hue.
  - Then use the dropper or click directly on the color palette to choose how light or dark you want your color.
  - A sample of your chosen color displays to the right of the dropper icon.

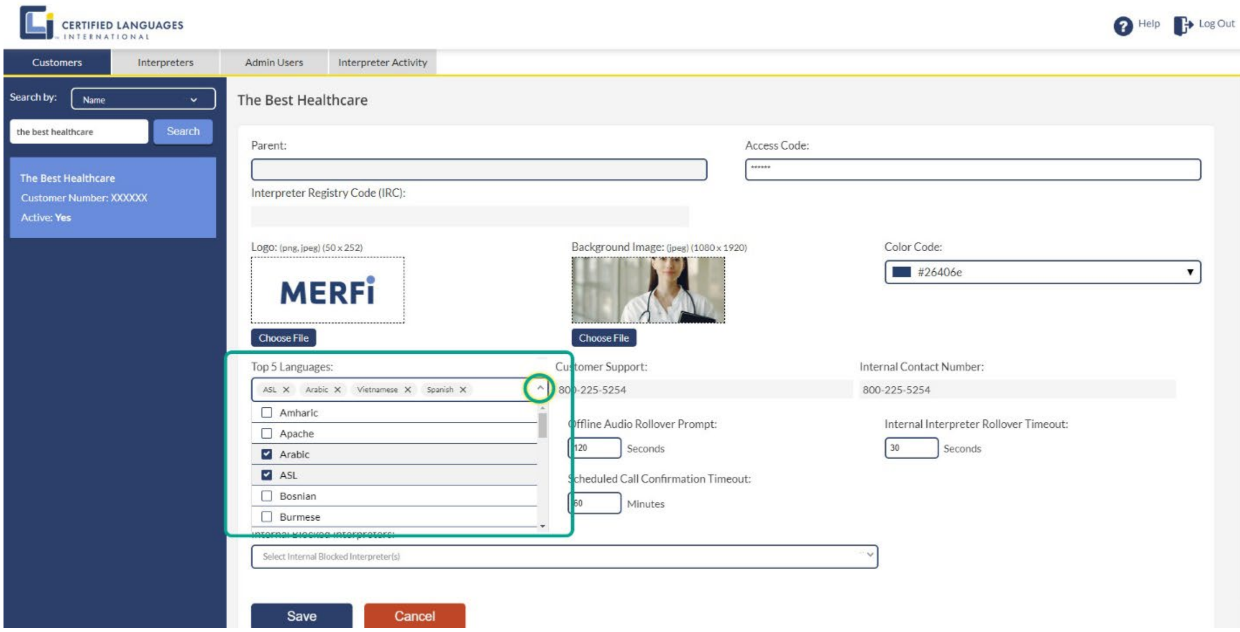
    - OR –
  - If your branding guide specifies RGB, HEX, or HSL values, enter them if desired.
- Click **Save**.
- Verify if the **Color** updated by logging in to the user portal.

Note: Changing the color will not affect the colors in the admin portal.

> Users may need to refresh their screen or clear their cache in order for the **Color**, **Background Image**, and **Logo** to change.

Top 5 Languages

Choose up to five languages to display in the user platform. All video languages will be available; the selected five languages are shown as visual tiles for easy access.



- Click the dropdown.
- Tick the boxes of up to 5 languages.
- Untick a box or click the **X** on the language tile to remove a language.
- Click **Save**.
- Verify if the **Top 5 Languages** updated by logging in to the user portal.

Customer Support

The **Customer Support** number is CLI's help desk phone number. It's published in the help menu of the user portal. Users can contact us anytime for support using this phone number.

Internal Contact Number

The **Internal Contact Number** is customizable and can include the internal phone number of your choosing.

We recommend using your IT Department's contact information. Some issues, such as bandwidth, are out of CLI's control, and will require internal support.

> To update your **Internal Contact Number**, please contact the primary contact on your CLI account. If you don't know who this is, contact us at customersuccess@certifiedlanguages.com or (800) 362–3241, ext. 7, and we'd be happy to help.

Online Audio Rollover Prompt

The **Online Audio Rollover Prompt** is the amount of time a user will wait for a video interpreter before being notified that all video interpreters are busy. The user will have the option to cancel the call, continue to wait, or switch to audio.

The default value is 60 seconds.

To customize:

- Type a numeric value in the field.
- Click **Save**.

Offline Audio Rollover Prompt

The **Offline Audio Rollover Prompt** is the amount of time a user will wait before being notified that no video interpreters are available.

The default value is 120 seconds.

To customize:

- Type a numeric value in the field.
- Click **Save**.

Internal Interpreter Rollover Timeout

The **Internal Interpreter Rollover Timeout** is the amount of time your internal interpreters have to answer a call before the call rolls over to CLI.

The default value is 30 seconds.

To customize:

- Type a numeric value in the field.
- Hit **Save**.

Internal Surge Notification

The **Internal Surge Notification** is the amount of time your internal interpreters have to answer a call before a notification is sent to them requesting they answer an incoming call.

All internal interpreters who have their SMS text and/or email enabled for notifications will be notified, regardless if they are logged into the platform or not.

The default value is 20 seconds.

To customize:

- Type a numeric value in the field.
- Hit **Save**.

Scheduled Call Confirmation Timeout

The **Scheduled Call Confirmation Timeout** is the amount of time your internal interpreters have to accept a scheduled call before it's offered to CLI interpreters.

The default value is 60 minutes.

To customize:

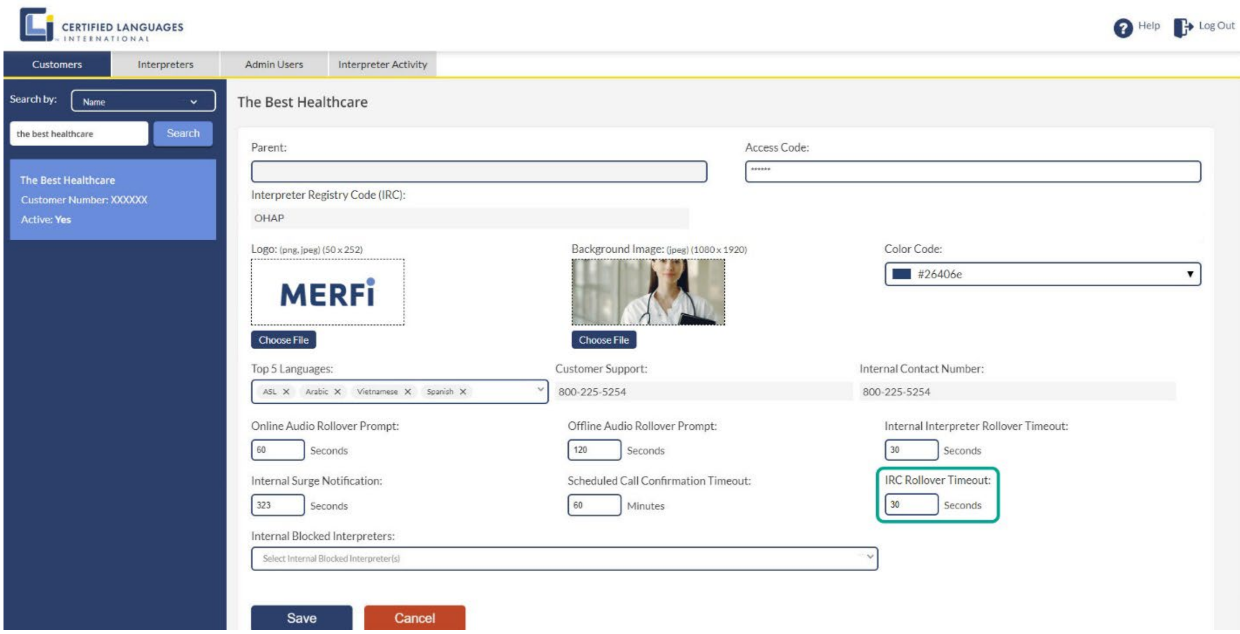
- Type a numeric value in the field.
- Hit **Save**.

> The **Scheduled Call Confirmation Timeout** function will not work for calls scheduled less than 24 hours from the current date and time **OR** if the value is set to zero.

IRC Rollover Timeout

The **IRC Rollover Timeout** is the amount of time an interpreter with the required IRC certification will have to answer a call before the call rolls over to interpreters without the certification. This field will only be displayed if the **Interpreter Registry Code (IRC)** field is populated.

The default value is 30 seconds.



To customize:

- Type a numeric value in the field.
- Hit **Save**.

> If your internal interpreters hold a certificate from the registering body your organization has elected to prioritize, they will be rung at the same time as CLI interpreters holding the same certificate. If they do not hold the certificate, they will be rung after the **IRC Rollover Timeout** is completed and have until the **Internal Interpreter Rollover Timeout** is completed to answer. Once both timers have completed, the request is offered to CLI interpreters not holding the certificate.

Internal Blocked Interpreters

The **Internal Blocked Interpreters** function allows admins to block internal interpreters from individual child accounts.

To block internal interpreters for child accounts:

- Click on the **Customers** tab.
- Filter by **Customer Number** or **Name**.
- Type in the name or number of the account, and hit **Search**.
- Choose the account from the list on the left to bring up the profile.
- Click on the dropdown arrow under **Internal Blocked Interpreters**.
- Select which interpreters you want to block for this account.
- Hit **Save**.
    - **Note**: You can unblock an interpreter at any time. If you want to block an interpreter from all accounts, navigate to their profile, and select **No** under **Active** status.

Section 4: Interpreters Tab

Search, view, and add staff interpreters under the **Interpreters** tab.

To search for and view an interpreter's profile:

- Click on the **Interpreters** tab.
- Select **Interpreter First Name**, **Interpreter Last Name**, **Interpreter ID**, **Language**, or **Customer Number** under the "Search by" dropdown.
- Enter search criteria in the search field, and hit **Search**.
    - **Note:** Please make sure your search criteria are spelled correctly. Your results may not return if there are misspellings.
- Click on the applicable result to display interpreter profile details.

Interpreter Profile Settings

The interpreter profile displays interpreter information and settings.

Interpreter ID

The **Interpreter ID** is located in the top left corner of the profile.

Call an Interpreter

To test call the interpreter, click the **Call an Interpreter** button in the top right corner. This function only works if the interpreter is logged on. If you click on the button when the interpreter is logged off, you'll see a notification saying, "**Interpreter not available**."

Editable Fields

Editable fields include **First Name**, **Last Name**, **Gender**, **Email**, **Phone**, **Active** status, **Languages(s)**, and **Video Calls**.

Video Calls can only be toggled on or off when the interpreter is online.

To take calls, an interpreter's **Active** status must be **Yes**.

Non-Editable Fields

Email Notification and **SMS Notification** are controlled by each interpreter. The individual interpreter can change those settings under the gear icon in the interpreter portal.

Section 5: Add a Staff Interpreter

As an admin, you have the ability to add and manage your own interpreter staff.

To add a staff interpreter to the portal:

- Click on the **+ (Plus)** icon to the right of the **Search** button.
- A blank profile page will appear to the right.
- Fill in **First Name**, **Last Name**, **Gender**, **Email**, **Phone**, **Active** status, and **Language(s)**.
    - **Note**: To add or modify an interpreter's IRC certification(s) contact your account representative.
- To clear the form and start over, hit **Cancel**.
- To save your entries and create a profile, hit **Save**.
    - **Note:** An Interpreter ID will be generated after the interpreter's profile has been filled out and saved. You will need to exit the interpreter's profile and re-enter to view the ID.

Email Notification and **SMS Notification** are controlled by each interpreter. Individual interpreters can change those settings under the gear icon in the interpreter portal.

Video Calls can only be toggled on or off when the interpreter is online.
To take calls, an interpreter's **Active** status must be **Yes**.

Section 6: Admin Users Tab

Add admin users or change your personal profile settings under the **Admin Users** tab.

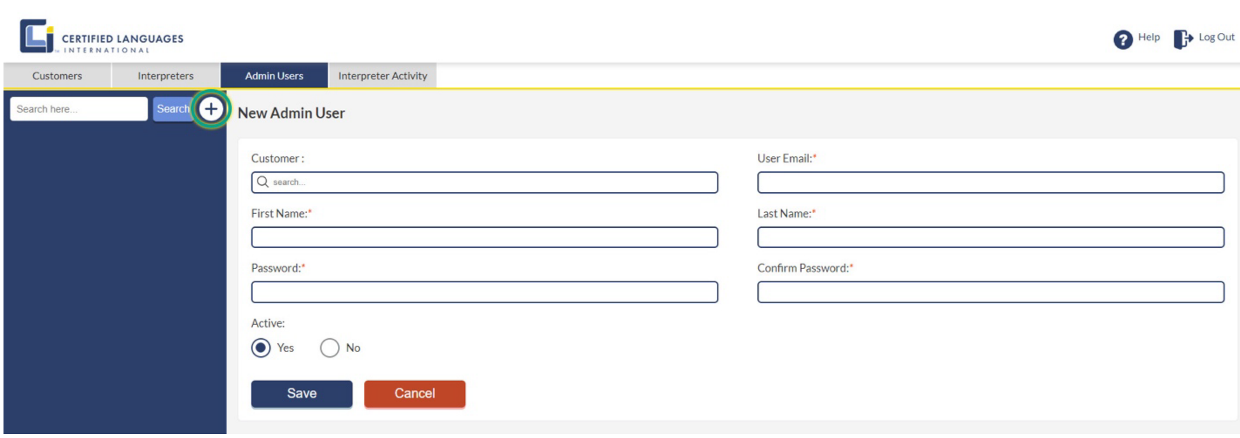
Personal Profile Settings

- To update Personal Profile Settings, select the Admin Users tab.
- Enter the name associated with the admin account you are looking for into the Search pane, and click **Search**.
  - **Note:** Please make sure your search criteria are spelled correctly. Your results may not return if there are misspellings.
- Click on the name. From here you can:
  - Update the **Name** associated with the admin account.
  - Update the **Password**.
  - Activate or Deactivate an account.
- Make your changes, and click **Save**.

> You **cannot** change the **Customer** or **User Email** fields associated with an admin account. If you need to make a change, deactivate the unwanted account and create a new one.

Add an Additional Admin User

- Select the **Admin Users** tab.
- Click the **+ (Plus)** icon to the right of the **Search** button.
- A **New Admin User** profile will display to the right.

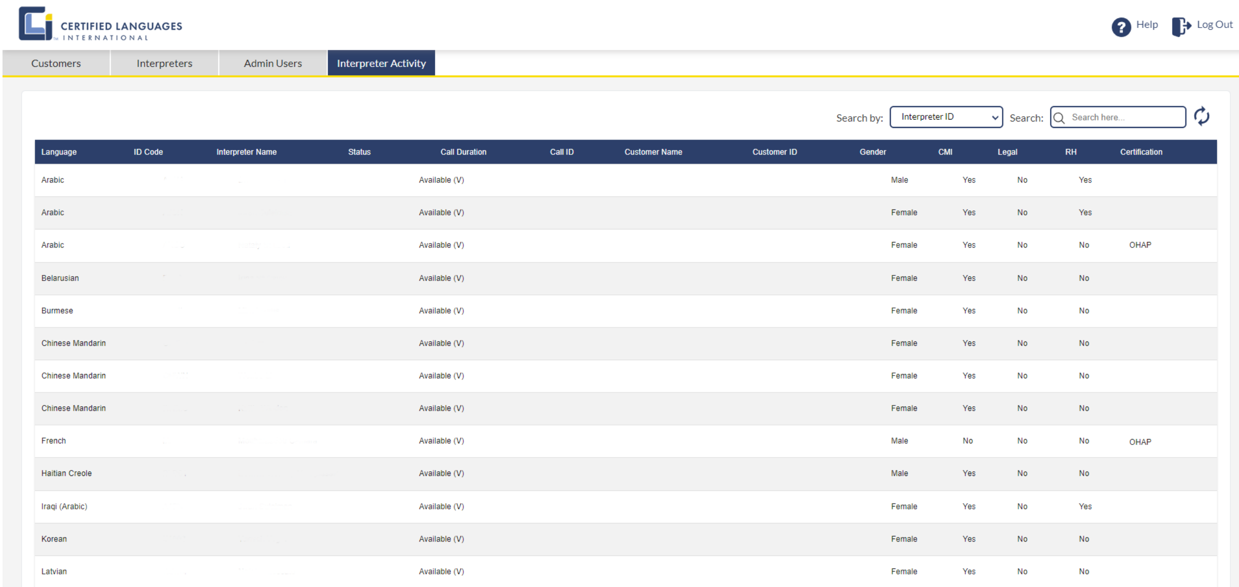


- Enter the organization or department you want the new admin associated with in the **Customer** field. Your organization or department will populate as you type.
    - **Note:** If nothing is entered in the **Customer** field, the new admin user you create will be categorized under the same customer account as you. **Double-check the Customer field is correct before clicking Save. You will not be able to edit after saving.**
- Make your selection from the options presented.
    - **Note:** If your organization or department is not populating, please contact your account representative.
- Enter the **User Email** address.
    - **Note**: Double-check the email address is correct before clicking Save. You will not be able to edit the email address after saving.
- Enter their **First Name**.
- Enter their **Last Name**.
- Enter a Password and Confirm Password.
    - **Note:** We recommend they change their password upon first login.
- Make sure **Yes** is marked under **Active**.
- Click **Save**.

To deactivate an admin user, navigate to their profile, and click the **No** button under **Active**. Click **Save**. They will no longer have access to their admin account. To reactivate, click the **Yes** button under **Active**, and click **Save**.

Section 7: Interpreter Activity Tab

Search and view your interpreter employee activities under the **Interpreter Activity** tab.



- Click on the **Interpreter Activity** tab.
- To search for an interpreter or a group of interpreters, select **Language**, **Interpreter ID**, **Interpreter Name**, **Status**, **Gender**, **CMI**, **Legal**, or **RH** under the "Search by" dropdown.
- Enter search criteria in the search field, and click the **Refresh** icon.
  - **Note:** Please make sure your search criteria are spelled correctly. Your results may not return if there are misspellings.

Search Criteria	Description
Language	Search by language will bring up all the interpreters for that language
Interpreter ID	Search for a specific interpreter via their interpreter ID
Interpreter Name	Search for a specific interpreter by their name
Status	Search by status. A dropdown will appear when **Status** is selected. Your choices are: • **Available:** Interpreters who are logged on and ready to take calls • **Unavailable:** Interpreters who are not logged on • **On call:** Interpreters who are logged on and are on calls • **Busy:** Interpreters who are logged on but not available to take calls

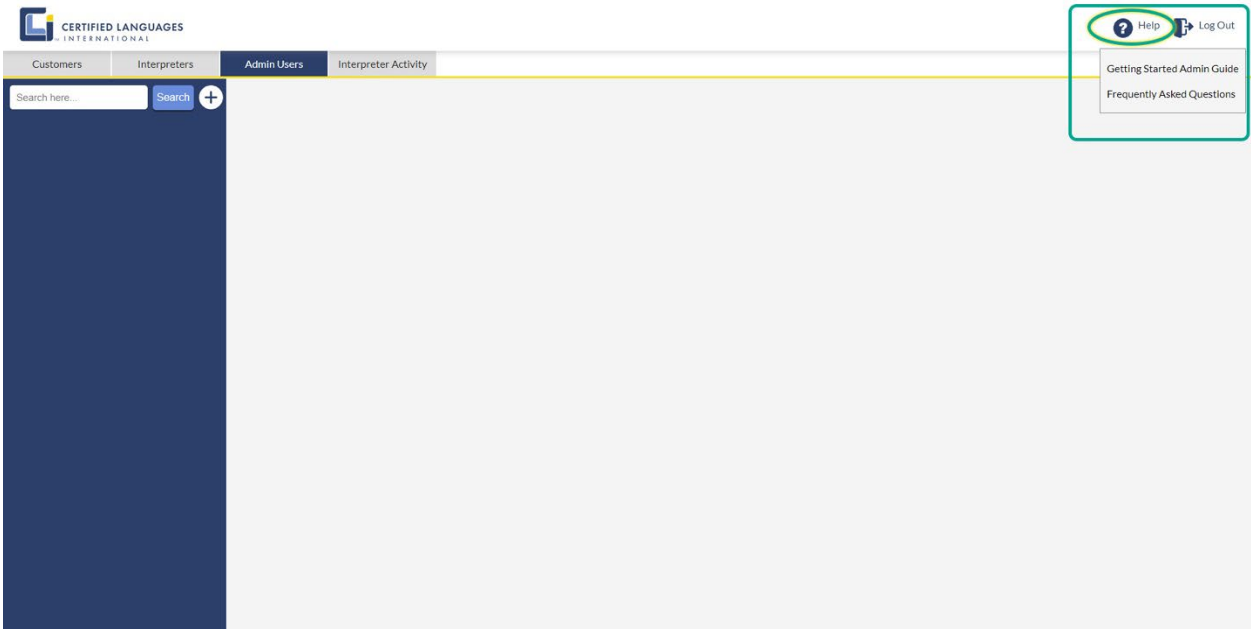
Search Criteria	Description
Gender	Search by chosen gender of interpreter. A dropdown will appear when **Gender** is selected. Your choices are **Male** or **Female**.
CMI	Search by whether an interpreter is a CMI (certified medical interpreter) or not. A dropdown will appear when **CMI** is selected. Your choices are **Yes** or **No**.
Legal	Search by whether an interpreter is comfortable taking legal-related calls. A dropdown will appear when **Legal** is selected. Your choices are **Yes** or **No**.
RH	Search by whether an interpreter is comfortable taking calls related to reproductive health. A dropdown will appear when **RH** is selected. Your choices are **Yes** or **No**.

The data presented in the **Interpreter Activity** tab is not automatically updated. You must refresh the screen by clicking the **Refresh** icon to see the most up-to-date data.

Section 8: Need Help?

Find helpful resources under the **Help** icon in the top right corner once logged in.

- Click the **Help** icon.



Admin Guide

The **Admin Guide** will take you to the MERFi Admin Support Hub, where you can explore the features available to you in the MERFi micro call center admin portal. Clicking on this link will direct you to an external website.

Frequently Asked Questions

The **Frequently Asked Questions** will take you to the MERFi Admin Support Hub. The FAQ page covers common questions we receive about using the MERFi micro call center admin portal. Clicking on this link will direct you to an external website.

If you need further assistance or have any questions, please contact your account representative.