Profile and Rates

Description:

Profile and Rates lets you modify your Apex account profile information as well as configure the rates you charge agencies for services you provide. Even though you set up your basic profile information when you created your Apex account, Profile and Rates allows you to specify additional profile information that agencies can use to match to you specific jobs.

The following Apex profile and rate settings are available to you through Profile and Rates:

- **General** - lets you further customize your account information.
- **Configure Services** - lets you customer the services you offer to agencies.
- **Rate Card Profile** - lets you configure the rates (prices) you charge agencies for the services you provide.
- **Billing Information** - lets you configure your billing information so that you may get paid by agencies through Apex for the services you provide.

How to Use it:

To open the Apex My Profile web page to configure your Profile and Rate information, do the following:

1. From Manage Jobs, click **Apex**, **Profile and Rates** *(Alt + a, p)*.

An Apex Web View window will open.

Apex Web View Window

The Apex Web View window provides access to the Apex website as if you were viewing Apex using an Internet Browser. If the Apex Web View window opens smaller than you'd like, you may expand the window by clicking and dragging the edges of the window to the desired size. You may also click the Maximize icon in the upper right corner of the Apex Web View window, to make the window the size of your display.

When you have finished with the Apex Web View window, you may close it by clicking the 'x' icon in the upper right corner of the window.

Additional Information:

You need to be logged in to your Apex account to access Profile and Rates.

© 2021 by Stenograph

General - Profile and Rates

Description:

The General tab lets you customize your account information. The General tab lets you configure 3 main types of information for your Apex account profile.

- **Profile / Calendar Type** - lets you decide what the visibility of your account is to agencies, and configure general profile information.
- **Preferences** - lets you specify what your job preferences are.
- **Certifications & Docs** - lets you list your professional qualifications and organization affiliations. This information can be used by Agencies to match you with specialized jobs.

Choose your profile/calenar type *

The top section of the General tab lets you decide what the visibility of your account is to agencies. You may select Public or Private.

- **Public** - Agencies will be able to search for you and send you an invitation to become an In-Network reporter for that agency. Agencies will also be able to view your Preferences and Certifications.
- **Private** - Agencies will not be able to search for you and send you an invitation to become an In-Network reporter for that agency. Agencies will not be able to view your Preferences and Certifications. Agencies will still have the ability to send you a job proposal.

You may view and modify the remainder of the General tab fields as needed:

- **Profile Photo** - Use the Browse button to select your own image as your Apex account profile image.
- **First Name *** - Displays the first name associated with your Apex account profile.
- **Last Name *** - Displays the last name associated with your Apex account profile.
- **Email *** - Displays the Email address associated with your Apex account profile. You cannot modify this field.
- **Mobile Phone Number *** - Displays the Contact Phone Number associated with your Apex account profile. The Contact Phone Number can be used for the receiving SMS (text) messages.
- **Office Phone Number *** - Displays the Company Phone Number associated with your Apex account profile.
- **Company Name *** - Displays the Company name associated with your Apex account profile.
- **EIN#** - Optionally, displays the EIN (Employer Identification Number) of the Company Name. The EIN# may be needed for tax purposes.
- **Address Fields** - Displays the address information for the Reporter Apex account.

Preferences

The Preferences section of the General tab is where you let Agencies know your job preferences. Only the "Hours Per Day Willing to Work" field is required. However, you may select / set any of the available preferences:

- **Remote site Availability** - Select this option to let Agencies know you are willing to take Remote (offsite) jobs.
- **Onsite Availability** - Select this option to let Agencies know you are willing to go to job locations.

© 2021 by Stenograph

- **Real Time Capable** - Select this option to let Agencies know you are able and willing to provide a realtime feed for Clients.
- **Expedited Turn Around Time** - Select this option to let Agencies know you are willing to take jobs that require an expedited transcript.
- **Want to receive SMS alerts for Job Changes, cancellations, new proposals?** - Select this option if you'd like to receive SMS (text) messages. The Mobile Phone Number field is the phone number that will receive SMS messages.
- **Miles Willing to Travel** - Specify the number of miles you are willing to travel for a job.
- **Hours Per Day Willing to Work *** - Specify the maximum number of hours you are willing to work for a job or multiple jobs per day.

Certifications & Docs

The Certifications & Docs section of the General tab is where you let Agencies know your professional qualifications and organization affiliations. This information can be used by Agencies to match you with specialized jobs. None of the Certifications & Docs are required:

- **User Speciality List** - Use the drop-down arrow to select from the available specialties. You may select more than one. To remove a selected speciality, click the 'x' to the left of the selected speciality you want to remove.
- **User Membership List** - Use the drop-down arrow to select from the available memberships. You may select more than one. To remove a selected membership, click the 'x' to the left of the selected membership you want to remove.
- **User Litigation Specialization List** - Use the drop-down arrow to select from the litigation types. You may select more than one. To remove a selected litigation type, click the 'x' to the left of the selected litigation type you want to remove.
- **User Certification list** - Use the drop-down arrow to select from the available certifications. You may select more than one. To remove a selected certification, click the 'x' to the left of the selected certification you want to remove.

How to Use it:

You fill out the information in the General tab the same way you would use a form on a website, you may click to move between fields and/or you may [TAB] between fields. Use the appropriate radio buttons or drop down arrows to make selections.
Items marked with an asterisk (*) are required.

Click the Save button to save changes.

Additional Information:

Be sure to click the Save button before moving to a different tab in the Apex Web Window if you have made changes to the General tab to avoid the accidental loss of the changes you made.

© 2021 by Stenograph

Configure Services - Profile and Rates

Description:

The Configure Services tab has a default list of services you can offer to agencies and clients. You use the Configure Services tab to select which service you currently offer. Agencies can use this information to match you with a job based on the services needed for that job.

Enabled services will appear in the Rate Card Profile tab to allow you to set a rate (price) for providing the service.

How to Use it:

Enabling and Disabling Services

There is a checkbox to the right of each service. To enable a service, click the checkbox so that it has a green checkmark. To disable a service, click the checkbox to remove the green checkmark.

Creating New Services

Use the ***+ Add Custom Service*** link to open a dialog that allows for your own services to be added to the list of default service provided by Apex.

- **Product Category *** - Use the drop-down menu to select the category this service belongs to.
- **Product Name *** - Type a name for the Custom Service. This is the name that will appear on jobs and invoices.
- **Unit Type *** - Use the drop-down menu to select one or more Unit Types appropriate for the service. For example, if you are going to charge an fee for performing a service, plus an amount for each transcript page created using that service, select the Flat Fee and Per Page Unit Types.
- **Value field(s)** – a value field will appear for each Unit Type selected. The Value field(s) are where you specify the Rates (prices) for the service.

Click the Save button to add the new service to the list of services. The new service will be Enabled by default.

Additional Information:

Be sure to click the Save Services button before moving to a different tab in the Apex Web Window if you have made changes to the Configure Services tab to avoid the accidental loss of the changes you made.

© 2021 by Stenograph

Rate Card Profile - Profile and Rates

Description:

The Rate Card Profile tab is where you can configure the rates (prices) you charge agencies for the services you provide. You can configure Default Pricing for agencies you are not an In-Network reporter for, In-Network pricing for agencies you are an In-Network reporter for, as well as create additional rate cards and assign one or more agencies to those card. An agency can only belong to one rate card.

How to Use it:

Selecting a Rate Card

Use the Rate Card Profiles drop-down list to select a rate card. For example, once you select the InNetwork Rate Card for... on the Rate Card Profiles list, you will then be able to set the rates for the services. By default any In-Network agencies will receive the InNetwork Rate card rates.

Creating a New Rate Card

You can create one or more new rate cards and add one or more In-Network agencies to a new rate card.

To create a new rate card, do the following:

1. Click the + Add button to create a new rate card. The Add Rate Card Profile dialog will display.
2. In the Rate Card Profile Name* field, type a name for the new rate card.
3. If you'd like to use rates you have already set up in a different rate card, select the Copy Rates From Existing Rate Cards drop-down list and then select the existing rate card from the list.
4. Use the Assign Rate Card Profile to Agency * drop down list to select one or more agencies to assign to the new rate card.
5. Click the Save button to create the new rate card.

Assigning an Agency to an Existing Rate Card

You may assign any of your In-Network agencies to an existing rate card. A rate card may have one or more agencies, but an agency can only belong to one rate card. In short, adding an Agency to a rate card removes that agency from the previous rate card.

To assign an agency to an existing rate card, do the following:

1. Click the Assign Agency button. The Assign Rate Card Profile dialog will display.
2. Use the Rate Card Profiles* drop-down list to select an existing rate card.
3. Use the Assign Rate Card Profile to Agency * drop-down list to select the In-Network agency you want to assign to the selected rate card.
4. Click the Save button to finish the assignment.

Setting Rates

The Services tab on the Rate Card Profile screen is where you can set the rates (prices) for the currently enabled services.

To set rates do the following:

© 2021 by Stenograph

1. In the Late Cancellation Threshold service, specify the duration in hours you consider to be late notice for a job cancellation. The default is 24 hours. This information can be used to invoice the appropriate job cancellation when a job is canceled.
2. Select the Rate Card you'd like to set the rates for. Each Rate Card may have its own rates.
3. Specify the Rate (in dollars) for each of the services listed.

Click the Save Rates button to save your changes.

Additional Information:

Be sure to click the Save Rates button before moving to a different tab in the Apex Web Window if you have made changes to the Rate Card Profile tab to avoid the accidental loss of the changes you made.

© 2021 by Stenograph

Billing Information - Profile and Rates

Description:

The Billing Information tab is where you configure your billing information for the agencies you want to invoice for the services you provide. The Billing Information screen also lets you set a branding logo, default payment terms and instructional text you'd like to display on the invoices you create.

How to Use it:

Setting a Branding Logo

To upload and use an image as your Branding Logo, do the following:

1. Click the Browse button. An Open dialog will display.
2. Browse to the location of your image, and either double click the image or select it and then click Open. A copy of your image will appear on the Branding Information tab page.
3. Select the Use the brand logo checkbox.
4. Click the Save button to save your Branding Logo.

Setting Default Payment Terms

If you'd like to set default text to appear on your created invoices to specify your Payment Terms, click inside of the Default Payment Terms field and type your Default Payment terms text. Click the Save button to save the changes.

Setting Notes

By default, Apex provides text with a link agencies can use to log in and pay an invoice.

If you'd like to set default Notes text to display on your created invoices to provide instructions for paying or anything you'd like to specify, click inside of the Notes field and type your desired text. Click the Save button to save the changes.

Connecting to Agencies for receiving payment

The bottom section of the Billing Information tab is where you can connect to an Agency account, so the Agency can pay you. The Agency can be In-Network or Out-of-Network.

To add an Agency, do the following:

1. Click the Add New button. The Agency* field will appear.
2. Click inside of the Agency field. Begin typing the name of the agency you want to connect with.
3. When the agency appears in the list, click on the agency.
4. Click the Create button. The Billing Account section will appear. Fill in the following fields:
   a. SSN Last Four * - provide the last 4-digits of your Social Security Number.
   b. Business Website * - If you have a business website, provide the URL to that site. If not, you may use www.google.com.
   c. DOB * - Use the Date Picker to specify your date of birth.

   d. Identity Document * - Click the Browse button and then use the Open dialog to select and Open an image file.

   e. Click the Save button in the Billing Account section.

5. The Add Bank Info section will appear. Specify the Routing Number and Account Number for the account you'd like to receive payment.
6. Click the Save button in the Add Bank Info screen.

After successfully connecting to an agency, the Agencies added section displays on the Billing Information tab. You may use the Agencies added section to "Add New" for connecting billing with other agencies, "View" and update your banking information for currently connected agencies, and "Remove" a currently connected agency from your list of connected agencies.

© 2021 by Stenograph