State of Indiana

RFP 20-1311
Interpretation and Translation Services

ISSUED BY:
LUNA Language Services
July 15, 2020

SUBMITTED TO:
Traci Davidson Sr. | Strategic Sourcing Analyst
Indiana Department of Administration

LUNA
Language
Services

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Company Profile

Established in 2001, LUNA Language Services was founded with a mission to promote language access in the form of written and spoken communication for people who do not speak English fluently, the Deaf or hard of hearing community, and the organizations servicing them. The company operates for, by, and with the inclusion of a multicultural and multilingual workforce and aims to mirror, respect, and honor the global population we serve through our work environment and the services we provide. We serve our clients 24/7/365 days a year.

We are proud of our diverse staff from many countries, including Burma, Mexico, Columbia, Spain, Bosnia, Uruguay, and the Philippines. In addition, we are pleased to have a fully accessible office for our Deaf and hard of hearing staff and visitors. In recognition of our ongoing commitment to diversity and inclusion, we were pleased to receive the City of Indianapolis Mayoral Diversity Award for Workplace Diversity. Our staff is asked to speak as subject matter experts on local demographics, diversity, our inclusive and caring office culture, and on how to be an ally to marginalized members of our community including refugees, immigrants, and the Deaf and hard of hearing. As a company we work to honor the stories of our staff and stakeholders, many who are members of those communities.

LUNA has established productive and strategic partnerships with various respected language industry businesses, associations, and non-profit organizations, as well as qualified and specialized individuals. With a spirit of collaboration, LUNA and our partners have worked together seamlessly to find avenues to share resources, skills, knowledge, and expertise.

In response to the exponential rise in the immigrant and refugee populations over the past decade and a half, the company's capacity has evolved to provide a full range of well-tested and utilized language services in over 200 languages across all sectors of Indiana. LUNA is certified by the International Organization for Standardization (ISO) ensuring our processes and procedures follow the highest standards in the industry. For these reasons and many more we look forward to continuing our long-term service to the State of Indiana.

LUNA

Certificate of Authority

State of Indiana
Office of the Secretary of State

CERTIFICATE OF EXISTENCE

To Whom These Presents Come, Greeting:

I, CONNIE LAWSON, Secretary of State of Indiana, do hereby certify that I am, by virtue of the laws of the State of Indiana, the custodian of the corporate records and the proper official to execute this certificate.

I further certify that records of this office disclose that

INDIANAPOLIS INTERPRETERS INCORPORATED

duly filed the requisite documents to commence business activities under the laws of the State of Indiana on February 01, 2001, and was in existence or authorized to transact business in the State of Indiana on July 01, 2020.

I further certify this Domestic For-Profit Corporation has filed its most recent report required by Indiana law with the Secretary of State, or is not yet required to file such report, and that no notice of withdrawal, dissolution, or expiration has been filed or taken place. All fees, taxes, interest, and penalties owed to Indiana by the domestic or foreign entity and collected by the Secretary of State have been paid.

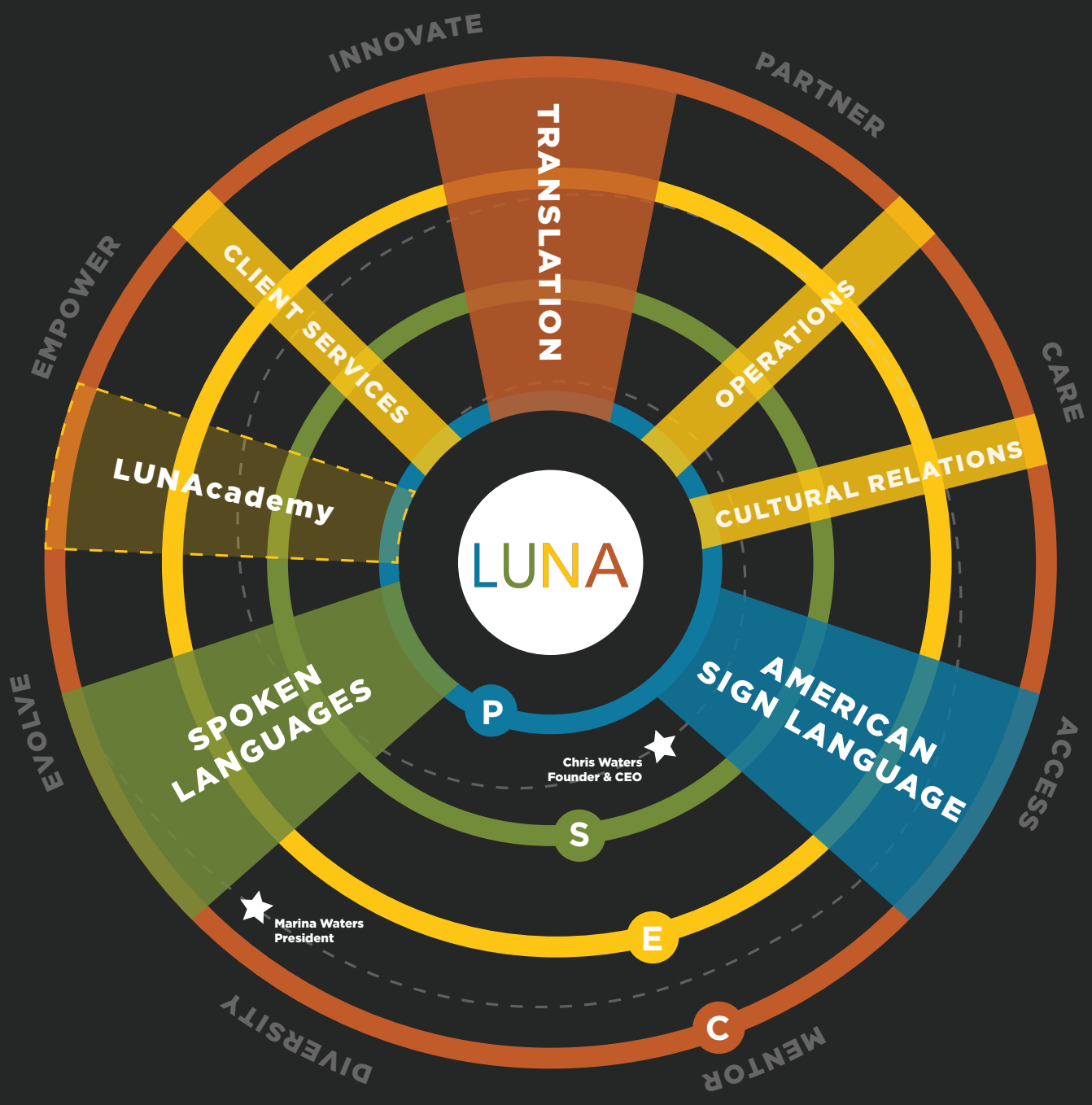
SEAL OF THE STATE OF INDIANA 1816

In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, July 01, 2020

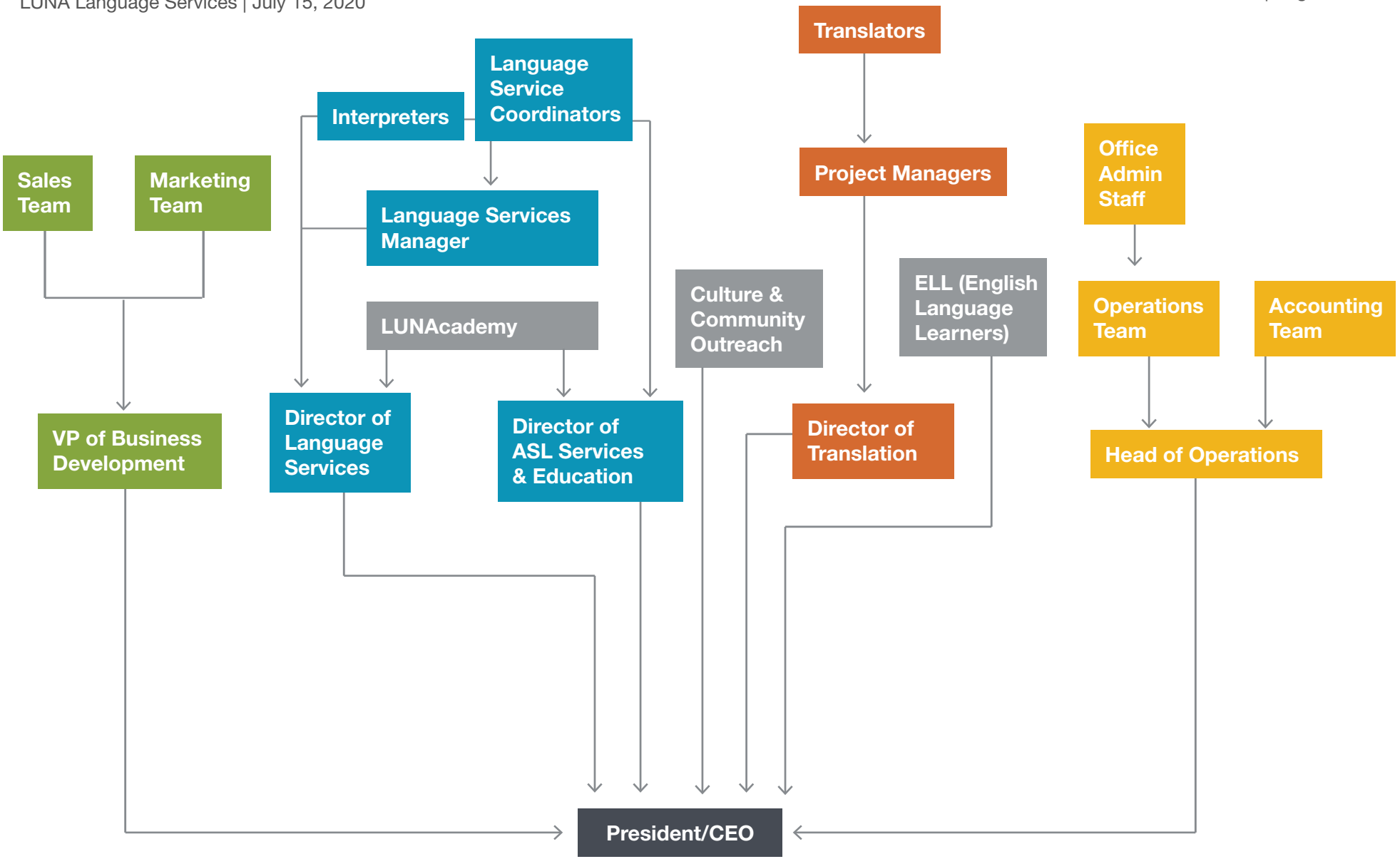
Connie Lawson

CONNIE LAWSON
SECRETARY OF STATE

2001020100272 / 20201502548
All certificates should be validated here: https://bsd.sos.in.gov/ValidateCertificate
Expires on July 31, 2020.



P partners S stakeholders E language experts C language coordinators


Translators
Language Service Coordinators
Interpreters
Sales Team
Marketing Team
Project Managers
Office Admin Staff
Language Services Manager
Culture & Community Outreach
ELL (English Language Learners)
LUNAcademy
Operations Team
Accounting Team
VP of Business Development
Director of Language Services
Director of ASL Services & Education
Director of Translation
Head of Operations
President/CEO

LUNA

Supplier Secure Home Page

Buy Indiana Application

Buy Indiana Application

ID	0000011232	Indianapolis Interpreters, Inc. 8935 N. Meridian St., Ste. 250	
FEIN	352151943	Indianapolis IN 46260	
Telephone	317/341-4137		
Email	chris@LUNA360.com		
Website	www.LUNA360.com		

Buy Indiana Status	Approved
Valid From	07/01/20 1:52:55PM
Valid To	07/01/25 12:00:00AM
Date Submitted	07/01/20 11:49:57AM

Save

Submit Application

Attachments (1)

Buy Indiana Application Conditions

Please select the condition that most closely represents the status of your business with the State of Indiana.

- (●) A business whose principal place of business is located in Indiana.

  Please attach a copy of your Indiana Secretary of State business registration showing that your business is registered as a domestic business. Attachments (1)

- ( ) A business that pays a majority of its payroll (in dollar volume) to residents of Indiana.
- ( ) A business that employs Indiana residents as a majority of its employees.
- ( ) A business that makes significant capital investments in Indiana.
- ( ) A business that has a substantial positive economic impact on Indiana.

☑ I certify that the information provided above is true and accurate as of the time of this request. I further understand that using a y false or misleading information may result in prosecution for fraud, revocation of validation, and having this business placed on a suspension list barring it from contracting or doing business with the State of Indiana or any of it agencies.

Buy Indiana Listing

A Buy Indiana listing will let other businesses find you based on the goods and services you are interested in providing to them. To be listed you must indicate you want a listing and you must be an Indiana Business.

☑ I want my business to be listed as an Indiana Business in the "Buy Indiana" Directory.

Description

Include a short description of your business for posting on the Buy Indiana Business Directory.

I dia apolis Interpreters nc., dba LUNA L ngu ge Services provides interpreting and translating services in over 120 languages. These services are provided in person or remotely.

Chris Waters

From: gmisworkflow@iot.in.gov
Sent: Wednesday, July 1, 2020 1:53 PM
To: Chris Waters
Subject: State of Indiana Buy Indiana Status

Dear Indianapolis Interpreters, Inc.,

After a thorough review of the information and/or documents submitted, Indianapolis Interpreters, Inc. does qualify for Buy Indiana status under Category # of **IC 5-22-15-20.5.** This email serves as confirmation of that determination. Please note this Buy Indiana designation will expire on **07/01/2025**.

Thank you.
INDIANA DEPARTMENT OF ADMINISTRATION

RELEVANT CLIENT LIST

Corporate

- Allison Transmission
- Bayer/Monsanto
- Catalent
- Centerfirst
- Eli Lilly

Educational

- Bartholomew Consolidated School
- Ben Davis High School
- Boswell Elementary School
- The Excel Center for Adult Learners
- Gary Community School Corp.
- Highline Public Schools, Washington
- Huntington University
- Indianapolis Public Schools
- IUPUI
- Ivy Tech
- Monroe County Community School Corp.
- Perry Township
- Project Lead the Way
- Purdue University
- Warsaw Community Schools

Government

- DHHS
- Indiana Department of Child Services
- Indiana State Department of Health
- Marion County Public Health Department
- ODAR/SSA Indianapolis

Insurance

- International Medical Group
- Seven Corners

Legal

- Allen Superior Court
- Indiana Supreme Court
- Johnson County Courts
- Maricopa County Courts, Arizona
- Marion Superior Court

Manufacturing/Logistics

- GEODIS
- Schuetz Container Systems
- SRAM
- Walmart

Medical

- Ball Memorial Hospital
- BioStorage Technologies, Inc.
- Carmel Ambulatory Surgery Center
- Center for Diagnostic Imaging (CDI)
- Center for Vein Restoration
- Community Health Network
- Cornerstone Autism Center
- Cummins Behavioral Health Systems
- Dermatology, Inc.
- Eskenazi Health
- Eye Center of Fort Wayne
- Fort Wayne City Utilities
- Fort Wayne Community Schools
- Fort Wayne Housing Authority
- Franciscan St. Elizabeth
- Franciscan St. Francis
- HealthNet Administration
- Hendricks Regional Health
- Henry County Hospital

Medical (continued)

- Hopebridge
- IU Health Partners
- Lutheran Health Network
- Oak Street Health
- Ortho Northeast
- OrthoIndy
- OurHealth
- Planned Parenthood
- Podiatry Associates of Indiana
- Rehabilitation Hospital of Indiana
- Riverview Hospital

Nonprofit

- Adult & Child Center
- Advocacy Links
- Amani Family Services
- Aspire
- Children's Bureau, Inc.
- Choices, Inc.
- Easter Seals Crossroads/ DCS
- Exodus Refugee
- Family Works, Inc.
- Pathway International, Inc.

Contact information for references for the above clients available by request.

PERSONAL MANIFESTO

I believe that the best way to serve my community is by growing a workforce that supports inclusive hiring. I work to build relationships that are based on authenticity and trust.

CONTACT

PHONE:
317-341-4137

WEBSITE:
www.LUNA360.com

EMAIL:
chris@LUNA360.com

SOCIAL MEDIA

LINKEDIN /in/chris-waters-5ba5773
INSTAGRAM @goLUNA360

HOBBIES

Outdoor Adventures
Green Spaces
Family Life
Golf

CHRISTOPHER WATERS

CEO- LUNA LANGUAGE SERVICES

EDUCATION

Bachelor of Business Administration
Oklahoma Baptist University
1998

WORK EXPERIENCE

LUNA Language Services, CEO
2001- Present
Leading the operations of a rapidly growing language services company dedicated to providing language access to multicultural and multilingual communities and recognized for its diverse workforce.

Freelance Spanish Interpreter
2000-2001
Served as a contract Spanish interpreter first responder to Indianapolis emergency departments during the onset of a wave of demographic shift in Central Indiana. Specialized in emergency and labor and delivery.

Peace Corps Volunteer
1998-2000
Supported small business owners on the Haitian border of the Dominican Republic. Played daily basketball with locals. Read the classics. Learned guitar. Became fluent in Spanish.

NOTABLE ACCOMPLISHMENTS & SERVICE

- Board of Directors, Alzheimer's Association of Indiana (2018-present)
- Indianapolis Business Journal 40 Under 40 (2016)
- Received recognition for contributions by the Indiana Latino Coalition Against Domestic & Sexual Violence, The Chin Community of Indiana, and Indy Pride

CONTRIBUTIONS TO THIS CONTRACT

- Oversee all aspects of service provision under Scope of Work.
- Lead the accounting team in invoicing.
- Participate as a speaker for training events for State Agencies.

Kelly Wright Greenwood, IN 46142 | (317) 341-4137 | kelly@luna360.com

PROFESSIONAL EXPERIENCE

LUNA Language Services, Indianapolis, IN
Head of Operations *April 2018 - Present*

- Maintain high levels of quality, accuracy, and process consistency in the company's operational efforts
- Oversee internal IT,HR, Compliance, Administrative, and Legal functions
- Proactively research and implement new technologies that improve efficiency and overall business operations
- Manage relationships with external partners and vendors
- Evaluate the efficiency of business operations according to organizational objectives and apply improvements

Service Connections Incorporated, Indianapolis, IN
Director of Operations *August 2014 - April 2018*
Web Manager and Account Manager *January 2004 - Julty 2014*
Project Manager *March 1999 - January 2004* *March 1999 – April 2018*

- Organized and monitored day-to-day business operations
- Developed and implemented procedures for interviewing, hiring, and managing employees and vendors
- Manage relationships with external partners and vendors
- Oversee procurement processes and coordinate resource allocation
- Review financial information and adjust operational budgets to promote profitability

Eli Lilly & Company/Kelly Scientific Resources, Indianapolis, IN
Vendor Information Researcher *August 1998– March 1999*

- Managed document control of incoming research and vendor information
- Researched vendor Year 2000 ready information using all available souces under the direction of the Vendor Information Leader
- Documented research results into the VCO database and properly archived research materials
- Used Vendor Compliance Management System to draft and mail letters to vendor and Lilly employees
- Handled both inbound and outbound phone calls, followed-up on previous correspondence in detail, and entered documentation in VCO database

EDUCATION

Indiana University, Bloomington, IN
B.S. Elementary Education *1993 - 1997*

- Concentration in Cultural Immersion
- Phi Delta Kappa
- Alpha Omicron Pi

Doonaha National School, Republic of Ireland
Indiana University Global Gateway for Teachers Program *1997*

- Taught in a one-room schoolhouse in rural Ireland which had 16 students in 8 academic groupings, ranging in age from 4-12 years old

Universidad Iberoamericana, Mexico City, Mexico
Summer Study Abroad *1995*

- Summer study with emphasis on Spanish language and culture studies

VOLUNTEER EXPERIENCE

Boston Public Library/Zooniverse *June 2020 – Present*
Citizen Historian - Anti-Slavery Historical Manuscripts

- Transcribe Boston Public Library's handwritten abolitionist material (Anti-Slavery Manuscripts collection) into typed format so that it can be more easily read and researched by students, teachers, historians, and big data applications
- The Anti-Slavery Manuscript collection currently contains roughly 40,000 pieces of correspondence, broadsides, newspapers, pamphlets, books, and memorabilia form the 1830s through the 1870s

WFYI Public Media, Indianapolis, IN
IRIS Radio Host and Actor *May 2019 – Present*

- IRIS is a service for the blind and visually impaired provided by WFYI public media. The service broadcasts 24 hours a day, 7 days a week
- Host "Science Hour" weekly and "National Geographic History" bi-weekly
- Played Mrs. Cratchit in "A Christmas Carol" and Portia in "The Merchant of Venice"
- Awards: 2017 Rookie of the Year, 2018 Diana W. Davis Service Hours Award, 2019 Diana W. Davis Service Hours Award, 2019 Ardath Y. Burkhart Award

iNaturalist
Citizen Scientist *August 2016 – Present*

- Submit observations of flora and fauna via iNaturalist's mobile platform, which is then used to provide valuable open data to scientific research projects, conservation agencies, other organizations, and the public
- Cataloged observations of over 145 species in central Indiana

PERSONAL MANIFESTO

Proud to be leading a business as a force for good. Thrilled to establish meaningful relationships with clients, staff and stakeholders in my community. Dedicated to foster creativity and leadership by getting out of people's way and letting them fly. Adamant about equality and nondiscrimination. Committed to sharing time and resources to my community through innovated giving.

CONTACT

PHONE:
317-341-4137

WEBSITE:
www.LUNA360.com

EMAIL:
marina@LUNA360.com

SOCIAL MEDIA

LINKEDIN /in/marinahwaters/
INSTAGRAM @goLUNA360

HOBBIES

Writing
Portraiture
Family Life
Backyard Chickens

MARINA HADJIOANNOU WATERS

PRESIDENT- LUNA LANGUAGE SERVICES

EDUCATION

University of Arizona College of Law- JD 2003

University of Arizona College of Public Health, MPH 2004

Lewis and Clark College, BS Psychology 1996

WORK EXPERIENCE

LUNA Language Services, President **2018- Present**
Leading a company dedicated to providing language access to multicultural and multilingual communities. Provides vision and heart to her staff.

LUNA Language Services, COO **2007-2018**
Oversaw the rapid growth interpreting business through acquisition and management of government and private contracts for Title VI compliance.

Legal Officer for United Nations Special Rapporteur **2008-2009**
Contract attorney for the UN Special Rapporteur on the Situation of Human Rights and Fundamental Freedoms of Indigenous Peoples.

University of Arizona, Staff Attorney **2003-2008**
Collaborated with a team of attorneys to respond to communications of alleged human rights abuses faced by indigenous communities.

NOTABLE ACCOMPLISHMENTS & SERVICE

- Board of Directors, Exodus Refugee & Immigration
- Board of Directors for the Community Health Foundation
- Recognized by the Indianapolis Business Journal as a Women of Influence in the city of Indiana (2017)
- Featured in the Indianapolis Monthly 20th Anniversary Edition, *Voices of Indianapolis*, June, 2020.
- Creative Mornings Speaker, *Come As You Are*, February, 2020.
- Served on the City of Indianapolis Public Service Advisory Council for Language Access and the Court Interpreter Advisory Committee for the Indiana Supreme Court.
- Lead Volunteer for American Red Cross International Services Division
- Former Vice President of the National Council for Interpreters in Health Care and Current member of the Policy and Education Committee.

CONTRIBUTIONS TO THIS CONTRACT

- Lead the LUNA staff in meeting deliverables under scope of work.
- Oversee all contracts and compliance management of contract.
- Participate as a speaker for training events for State Agencies.

NAW EH PHAW
504 Buffalo Ridge Circle
Indianapolis, Indiana 46227
(317) 358-9967
naw@LUNA360.com

Experience:

LUNA Language Service — Director of Language Services

April 2009- present

- Assists the President in the managements of the Spoken Language Department
- Manages a team of in-house coordinators and staff interpreters and recruiting assessing and managing a large body of contract interpreters.
- Oversees the Bridging the Gap program, language testing and in-house training for staff and contractors
- Works closely with the Coordinator manager in a daily basis and communicate effectively
- Oversees after hours coordinating Team and help whenever the need arises
- Oversees the registration and coordination for Bridging the Gap training
- Works closely with the marketing team to provide quotes for new clients and adjust pricing for existing clients when necessary.
- Provides existing clients with diversity trainings
- Computes and monitors employee vacation and sick days. Complete the performance reviews regularly at 90 days, 120 days and annually with all spoken language team members.
- Recruits, assesses, and "onboards" contract all spoken Language interpreters. This applies to fulltime staff for the spoken language department.
- Coordinates complicated interpreting requests, conference interpreting, team assignments, or will personally interpret by request or if necessary, for these special requests.
- Provides mentoring/shadowing services support to staff and contract interpreters.
- Continues to build strong relationship with the existing clients by getting feedback via phone, e-mails and meeting quarterly if necessary.

- Provides interpreting and proofreading services as needed for Karen, Burmese, Falam and Hakha Chin

Exodus Refugee Immigration Inc Resettlement Coordinator
April 2007-2009 Indianapolis, IN

- Case management for refugee resettlement
- Interpret/translate for Burmese clients as needed for both legal and medical appointments
- Coordinate the case workers and assign them daily assignments

Catholic Charities Indianapolis & Exodus Refugee/Immigration, Inc. Contract interpreter

September 2006 - April 2007 Indianapolis, IN

- Interpret for Burmese refugees as needed for both local refugee programs
- Assisted staff members in compiling appropriate care plans for refugee families
- Accompanied staff members and clients to health care, social welfare, and job preparation appointments to facilitate communication and assist clients in adjustment to new culture

Education

INTERNATIONAL THEOLOGICAL SEMINARY *Master of Arts in Theological Studies*

May 2002 - June 2004 Los Angeles, California

FAR EASTERN FUNDAMENTAL SCHOOL OF THELOLOGY *Master of Arts in Ministry*
June 1993 - February 1998 Yangon, Myanmar (Burma)

UNIVERSITY OF YANGON *Bachelor of Science, emphasis in Physics*

November 1993 - May 2001 Yangon, Myanmar (Burma)

INTERPRETING TRAINING CERTIFICATES

- 40 hour Bridging the Gap medical interpreter training
- Core CHI certified
- Attended IN Supreme Court Interpreter Certification orientation
- Scored Outstanding in Language Proficiency Assessment for English, Burmese, Karen

Volunteer Experience

Falam Baptist Chruch of Indiana Superintendent, Christian Education Department. *interpreter/translator*
December 2005 – present Indianapolis, IN

- Interpret sermons into Karen, Chin and Burmese languages
- Lead the Children Ministry
- Assists in adjustment to American culture

WIN KIDS HOME (Orphanage in Yangon, Myanmar) *founder and ongoing sponsor*

May 2001 – present Yangon, Myanmar (Burma)

- Cooperated with husband to begin orphanage in 2001 for children who lost parents in Burmese civil war
- Directly involved in all planning and operations of orphanage until moved to US in May of 2002
- Currently provide ongoing support, direction, and funding for orphanage from home in US

Awards & Recognitions

INTERNATIONAL STUDENT SCHOLARSHIP *Award recipient*

- Recipient of full-ride scholarship to graduate school based on academic achievement in preceding educational experiences

Languages

- Burmese – native language; written and spoken, excellent
- Karen – native language; written and spoken, excellent
- Falam Chin – native language; written and spoken, excellent

- English – “second” language; written and spoken, very good

References

Available upon request.

Resume of Neminoo Sakuthay, Staff Translator/Interpreter, LUNA Language Services, Inc.

LANGUAGE PAIRS

English <> Burmese (Native)

English <> Karen (Native)

CONTACT INFORMATION

8935 N. Meridian St., Suite 250, Indianapolis, IN 46260

317-341-4137, Nemin@LUNA360.com

SKILLS PROFILE

- Native fluency in Karen and Burmese
- Near-native fluency in English
- Intermediate fluency in Thai
- Skilled in Video Subtitling
- Skilled in Desktop Publishing applications
- Skilled in SDL Trados Studio and MultiTerm CAT tools
- Excellent customer service
- Excellent communication
- Excellent time management and organization skills
- Excellent computing skills
- Experienced in social services
- Experienced in developmental and educational projects
- Experienced in interpretation and translation services

EMPLOYMENT (UNITED STATES)

Translation & Interpretation	**Staff Interpreter/Translator**, LUNA Language Services, Inc. Indianapolis, IN	Nov 2015- Current
	Health Navigator, Exodus Refugee/Immigration, Inc. Indianapolis, IN	Jan 2012- Sep 2013
	Resettlement Case Worker, Exodus Refugee/Immigration, Inc. Indianapolis, IN	May 2008- Jan 2012
Computer Technology	**Consultant**, Residential IT Services, Indiana University. Bloomington, IN	Aug 2007- Apr 2008

EMPLOYMENT (THAILAND)

Education and Development	**Coordinator**, Political Capacity Building Program, Democratic Party for a New Society Chiang Mai, Thailand	Sep 2003- Aug 2005
	Office Assistant, Education Project, The Burma Project, Open Society Institute Bangkok, Thailand	Jul 1997- Dec 1999
Translation and Interpretation	**Freelance Interpreter and Translator**, Burmese pro-democracy organizations and foreign journalists Bangkok, Thailand	Jun 2002- Sep 2003
	Interpreter and Translator (volunteer), General Secretary office, Democratic Party for a New Society Mae Sot, Thailand	Jan 2000- Feb 2001

EDUCATION & TRAINING

Translation and Interpretation Training	**Terminology Management—The Roles and Skills Involved in Terminology Work**, Barbara Inge Karsch, GALA Global www.gala-global.org	Jun 2020
	The Health of Your Terminology Database: Why Worry?, Barbara Inge Karsch, GALA Global www.gala-global.org	Jun 2020

Translation and Interpretation Training	**Introduction to Court Interpreting,** Holly Mikkelson Book	Jan 2020
	Interpreting in Jury Trial, LUNAcademy, LUNA Language Services Indianapolis, IN	Nov 2018
	Conference, Midwest Association of Translators and Interpreters Indianapolis, IN	Sep 2018
	Court Interpreter Orientation, Interpreter Certification Program, Indiana Supreme Court Indianapolis, IN	Aug 2018
	Demystifying Court Interpreting, LUNAcademy, LUNA Language Services Indianapolis, IN	May 2018
	Interpreting in Juvenile Court, LUNAcademy, LUNA Language Services Indianapolis, IN	Feb 2018
	Conference, American Translators Association Washington, D.C.	Dec 2017
	Building Medical Vocabulary, LUNAcademy, LUNA Language Services Indianapolis, IN	Jul 2017
	Court Interpreter Orientation, Interpreter Certification Program, Indiana Supreme Court Indianapolis, IN	Jan 2016
	Bridging The Gap: Medical Interpreter Training, LUNA Language Services Indianapolis, IN	May 2015
	Mental Health Advanced Interpreter Training, Language Training Center Indianapolis, IN	Dec 2010
	Health Care Interpreter Training, Language Training Center Indianapolis, IN	Jun 2009
Higher Education	**International Studies**, Indiana University Perdue University of Indianapolis Indianapolis, IN	Aug 2013- Dec 2013
	International Studies, Indiana University Perdue University of Indianapolis Indianapolis, IN	Aug 2015- Dec 2015
	Political Science, Indiana University Bloomington, IN	Aug 2005- Dec 2007
High School Diploma	**General Education Development Diploma**, Maine Department of Education Augusta, ME	Aug 2004
	High School Diploma, Maw Ker Refugees High School Pob Pra, Thailand	Mar 1996

REFERENCES AVAILABLE UPON DEMAND

Rebecca A. Buchan, MA, CI, CT, IIC

6401 Raldon Road Anderson, IN 46013 765-425-2012 (cell) becterp@gmail.com

EDUCATION/QUALIFICATIONS

- ***Certificate of Transliteration***, Registry of Interpreters for the Deaf, 2003
- ***Certificate of Interpretation***, Registry of Interpreters for the Deaf, 2001
- ***Masters of Arts***, Ball State University, Muncie, IN 2014
- ***Bachelor of Arts,*** Anderson University, Anderson, IN 1993
- ***Associate of Arts***, Anderson University, Anderson, IN 1993
- ***Mental Health Interpreter Training (MHIT) graduate,*** 2011
- ***Indiana Supreme Court Qualified Interpreter,*** 2014

EXPERIENCE

- ***Director of ASL Services and Education, 2013-present, LUNA Language Services***.
  Oversees the ASL department and the implementation of major contracts that involve ASL interpreting services. Creates and presents workshops and trainings in both an ASL and language neutral context. Trains mentors and implements mentoring programs and events.

- ***Video Interpreter, ZVRS, August 2010-present***.
  Interpreting telecommunication conversations between Deaf/Hard of Hearing and Hearing callers. Providing excellent customer service to both the internal and external customers of ZVRS. Collaborating and functioning as a team member of the Indianapolis call center.

- ***Community Interpreter, 1998-present.***
  Interprets in various settings including, but not limited to medical, legal, post-secondary, social services, educational, mental health and video remote interpreting.

- ***Professional Development Specialist/VI-P Program Lead Mentor/ Lead Trainer/Video Interpreter, Sorenson Communications, Indianapolis, IN, December 2004-August 2010.***
  Developed workshops and trainings for Video Interpreters. coordinated and implemented local VI-P Mentoring program. Collaborated with management and mentoring team to successfully lead VI-P participants through the program and ultimately to National Certification. Coordinated schedules for current VI-Ps. Maintained and organized VI-P and Training records and materials. Facilitated NIC Written Study groups. Trained current and newly hired interpreters on Sorenson Communications software, policies and procedures. Interpreted and transliterated telecommunications via videophone technology.

- ***Staff Interpreter, BehaviorCorp, 2006-2010.***
  Worked collaboratively on a team of four nationally certified interpreters for a state mental health agency that included out-patient, residential and in-patient interpreting services. Interpreted for both Deaf clients as well as Deaf therapists and executive staff.

- ***Interpreter Training Program Instructor/Practicum Mentor, Indiana University-Purdue University Indianapolis, January 2005-present.***
  Instructs in various Interpreting classes. Mentors ITP students in a variety of settings during their Senior Practicum. Works with ITP Chairperson on evaluation techniques and protocol for Practicum mentors and students. Serves on program Advisory Board.

- ***National Presenter/Facilitator/Mentor, 2004-present.***
  Develops and presents skill building workshops for working interpreters on local and state levels. Leads NIC Written Study groups for beginning interpreters. Works as a mentor in both formal and informal settings for community based interpreters. Interprets for local and state interpreting conferences.

RICARDO GOMEZ

Finance Operations Manager

PROFILE

Worker with strong interpersonal and organizational skills with an ability to multitask a variety of challenges and responsibilities. Exceptional verbal and written bilingual in English and Spanish communication. Capacity to interact with all levels of management. Enjoys a team environment, meet deadlines, and work under a minimal level of supervision.

CONTACT

305-331-1348

Ricardo@LUNA360.com

EXPERIENCE

LUNA

2015 - PRESENT

Finance operations Manager.
Supervise the daily tasks of the finance department.
Manage account payables.
Supervise billing process.
Create and maintain task calendars for the finance department.

SKILLS

- Knowledge of the administrative procedures and tools required to support an individual or group.
- Work efficiently under pressure, juggle tasks and meet deadlines.
- QuickBooks, Office and other software knowledge.

EDUCATION

Bridging the Gap

2015
LUNA Language Services

Intensive English

2003
Florida Metropolitan University

UNA HARTZELL-BAIRD, MPA

DIRECTOR OF TRANSLATION

PROFILE

Successful team leader, innovator, and process developer who is always looking for areas of improvement, opportunities to provide a hand up, and professional development.

CONTACT

317 650 9873

Una@LUNA360.com

8935 N. Meridian St.
Indianapolis, IN 46260

SKILLS

- ISO
- Process design
- Office Suite
- Vimeo
- Articulate 360

EXPERIENCE

LUNA Language Services, Director of Translation
JAN 2017 - PRESENT

Overhauled fledgling department and implemented growth strategies with resounding success.

LUNA Language Services, Operations Manager
JAN 2015 - JAN 2017

Worked collaboratively with internal departments to coordinate improvements and increase efficiency.

LUNA Language Services, Internship Program
JAN 2015 - PRESENT

Created LUNA's summer internship program. Organized advertising, interviewing, and selection of summer interns resulting in 50% hiring conversion.

EDUCATION

Indiana University-Indianapolis
2010

Master of Public Affairs

Indiana University-Indianapolis
2009

Bachelor of Science in Public Affairs, summa cum laude

ENGAGEMENT

Reading | Advocacy | Fitness | Gardening

Victor Castillo

Mobile: 317.629.5853
Email: vc3208@gmail.com
748 Worcester Ave. Indianapolis, IN 46203

Areas of Practice

Health Care Administration
Customer Service
HIPPA Compliance
FTC Administration Services
Language Interpreter

Computer Applications

MS Excel
MS Word

Education/Qualifications

Bachelor of Science
Health Services Management
May 2017
Indiana University Purdue University Indianapolis

Skills

Excellent oral and written Spanish and English communication skill

Detail oriented

Adept customer service and customer resolution skill

Health Care Liaison

Certifications

June 2013

CCHCP -Bridging the Gap Medical Interpreter Training Program

Professional Summary

Highly professional, organized, resourceful administrative orientated with the willingness to successfully manage health care operations.

Principal Areas of Practice

- Customer Support
- Consumer Liaison
- HIPPA Compliance
- Spanish/English Interpreter

Professional Experience

Long Term Care Group, Inc.

Dec 2017 – Present

Part-time Bilingual Spanish Interviewer

- Conduct outbound/inbound telephonic interviews for insurance company applicants in a quiet, professional, environment without interruptions and/or distractions
- Accurate documentation of client's health history and lifestyles
- Completed interviews in a timely manner
- Exceptional customer service

Luna Language Services – Indianapolis, IN

Apr 2013 – Present

Coordinator Manager/Bilingual Medical Interpreter

- Manage the coordinating team
- Coordinate medical interpreter appointments from our clients (IU Health, Community Health Network, Franciscan Alliance, Riverview Health)
- Voice over translation work for IndyGo
- Facilitate communication between language barriers
- Exposure to population health factors
- Importance of patient privacy/confidentiality

Interconnect Services Corporation – Indianapolis, IN

Jan 2013 – Mar 2013

Bilingual English/Spanish Medical Interpreter

- Assist Spanish speaking patients understand the important information related to their health care

Victor Castillo

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FTC Administration Services
Language Interpreter

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MS Word

Education/Qualifications

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Detail oriented

Adept customer service and customer resolution skill

Health Care Liaison

Certifications

June2013

CCHCP Bridging the Gap Medical Interpreter Training Program

Lockheed Martin Corporation – Indianapolis, IN

Jun 2007 – Jan 2013

Bilingual Customer Service Representative

- Respond to a heavy volume of incoming calls from English/Spanish speaking consumers calling the FTC hotline to report their incidents of identity theft and general consumer complaints against companies
- Input consumer's personal information into Federal Trade Commission Identity Theft Clearinghouse Database
- Provide consumer with orientation on how to protect their identity, steps to take to resolve their issue, and provide consumers with valuable information to do proper disputes with the company that they had a complaint against
- Professionalism Award received from the Federal Trade Commission in August 2010 for providing top quality assistance to English and Spanish speaking consumers

O'Reilly Auto Parts – Indianapolis, IN

Aug 2006 – Jun 2007

Bilingual CSR/Assistant Manager

- Assist English/Spanish speaking customers with their automotive needs
- Provide customers with the parts need to fix their automobile
- As an assistant night manager, my responsibility was to make inventory of the parts sold throughout the day
- Administered the sales at the end of every business day as well as recorded data into the computer which detailed the sales profit for the day

Wes Bremer

Indianapolis, IN (317) 719-1127
www.linkedin.com/in/wesley-bremer-25a5b5188/ wes@luna360.com

SUMMARY OF QUALIFICATIONS

Bilingual - English/French * Healthcare customer service experience
Peace Corps service in Benin, West Africa * French teacher for four years

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Work and Volunteer Experience

*** Training Coordinator at LUNA Language Services,** Sept. 2019 – present – Indianapolis, IN
- Recruit and enroll aspiring interpreters for a medical training program (Bridging the Gap).
- Plan and promote monthly trainings for interpreters.
- Account for training expenses and report these to the Finance Department.
- Answer calls from clients requesting interpreters.
- Contact and schedule interpreters for client requests.

***French Teacher at Eastwood Middle School (6th-7th grade),** Aug. 2017 - May 2019 - Indianapolis, IN
- Created and taught lessons for 6th and 7th grade French.
- Communicated with parents and administrators about student behavior concerns.
- Maintained ongoing data on student progress as part of the teacher evaluation process.
- Launched school-wide service project for the 2017-18 school year.
- Organized the school's foreign language club in collaboration with colleagues.
- Worked independently and made decisions as to the importance and urgency of certain tasks.

***Customer Care Specialist at Roche Diagnostics,** Sept. 2016 - July 2017 - Indianapolis, IN
- Helped French-Canadian callers troubleshoot their blood sugar meters.
- Worked among and socialized with native French speakers.
- Acquired soft skills and medical knowledge necessary for providing compassionate technical assistance.
- Grew exponentially in the ability to multi-task; logging calls quickly required learning to speak, listen, type, and read at the same time.

***French Teacher at Fishers High School (9th-11th grade),** Oct. 2014 - May 2015 – Fishers, IN
- Planned and executed French lessons.
- Calculated and entered student grades into Skyward.
- Implemented and maintained classroom policies and procedures necessary for effective learning.
- Created projects and tests to evaluate students' knowledge and skills.

Work and Volunteer Experience (Continued)

***Peace Corps Teacher (5th and 6th grade),** June 2012 - Aug. 2014 – Benin, West Africa
- Gained greater fluency in French by living and working in a French-speaking country for two years.
- Taught 5th and 6th grade English in rural Benin.
- Bolstered the English and pedagogical skills of the local English teachers by attending department meetings, creating instructional materials and leading an English club.
- Fundraised $8,700 through the Peace Corps Partnership Program.
- Implemented a project for the construction of three classrooms.
- Wrote a monthly newsletter to update friends and family on cultural insights from my service.

***Varied Community Service in Undergrad,** Aug. 2008 - Dec. 2011 - Marian University Indianapolis
- Organized and led an Alternative Spring Break in 2010.
- Planned, budgeted and accounted for Marian's 2010 protest trip to the School of the Americas.
- Volunteered weekly with STAR (Students Taking Active Roles).
- Facilitated monthly gatherings for awareness and activism as leader of Pax Christi Club.

Education and Skills

Indiana Teaching License and 18 graduate hrs. in Education, June 2016 - IUPUI Transition-to-Teaching

B.A. in French, Dec. 2011 - Marian University Indianapolis

- **Academic Excellence**: 4.0 cumulative graduate GPA, 3.97 cumulative undergrad GPA, 2010-11 Senior French Award, member of National French Honor Society (Pi Delta Phi).

-**Language Skills:** Nine years of formal French study. Certified in French as Advanced High proficiency by Peace Corps (ACTFL Proficiency Scale).

-**Cross-Culture Experience:** Two years abroad in Benin instructed me much in the challenge of relating across two markedly different cultures. Acquired effective strategies in this regard.

-**Current Volunteer Involvement:** 1. Monthly Graced Meals through Our Lady of Grace Parish. 2. My Brother's Keeper homeless outreach ministry.

Zachary E. Zeunik

zachdcktt@aol.com | 65 N 16th Ave, Beech Grove IN, 46107 | (317)-213-7106

EDUCATION

INDIANA UNIVERSITY-PURDUE UNIVERSITY INDIANAPOLIS **(2014- 2018)**

Bachelor of Arts Arabic, French, and Translation Studies
GPA: 3.65 / 4.00

- Shafi Memorial Scholarship Recipient
- Margaret A. Cook Study Abroad Scholarship Recipient
- Finish in Four Award Recipient
- Dean's List Recipient (2014-2018)
- Arabic Club Officer (2014-2017); President (2017-2018)
    - Tutored international students, assisted non-native speakers with practicing Arabic grammar, pronunciation, and reading comprehension
    - Organized and planned club activities about cultural awareness and language acquisition both independently and with other club officers

EXPERIENCE and EXTRACURRICUALR ACTIVITES

SENIOR PROJECT MANAGER **(March 2019- Present)**
LUNA Language Services **Indianapolis, IN**

- Coordinated incoming translation requests for individual clients and designated them to the appropriate language team or vendor
- Tracked all projects from start to finish and remained as the point-of-contact throughout the duration of a project request
- Managed accounts for prominent companies and worked closely with clients to organize large-scale translation requests pertaining to health policy, legal, medical, communications, and marketing
- Utilized design programs such as InDesign, Illustrator, and Photoshop to edit and format translation, as well as to accommodate specific client requests

TRANSLATION AND LANGUAGE SERVICES INTERNSHIP **(June 2018-August 2018)**
LUNA Language Services **Indianapolis, IN**

- Translated IDs and legal documents from Arabic to English daily on request
- Observed and assisted at medical interpreting sessions in order to gain experience with onsite interpreting
- Became a certified medical interpreter by successfully passing the Bridging the Gap (BTG) medical interpreting training course and language aptitude test
- At the end of the internship, was offered a full-time position as an assistant project manager in the translation department

ARABIC TRANSLATOR ASSISTANT **(January 2017- June 2018)**
TECHCOM **Indianapolis, IN**

- Served as a freelance, contract translator for industrial businesses around the Indianapolis area
- Worked independently and under the supervision of two professional Arabic translators on a Diesel Engine Manual technical translation
- Edited Arabic audio recordings using sound equipment and computer software to check for errors
- Proofread the finished Arabic manual for grammar and punctuation consistency, and ensured customer comprehension was maintained

LANGUAGE LIST

Additional Languages Available for On-site, Phone, and VRI

VRI available from 8am - 8pm EST, M - F (except for ASL and Spanish, available 24/7)

American Sign Language (ASL) - Available 24/7
Anuak*
Arabic
Bulgarian*
Burmese
Cambodian*
Catalan*
Chinese Cantonese*
Chinese Mandarin
Farsi*
French
Gujarati*
Haitian Creole
Hmong*
Hungarian*
Igbo*
Italian
Kinyarwanda*
Kirundi
Korean
Nepali*
Pashto*
Polish*
Portuguese
Punjabi*
Romanian*
Russian
Somali
Spanish - Available 24/7
Swahili
Tagalog (Filipino)
Urdu
Vietnamese

Language List for On-site and Phone Interpreting

Afrikaan
Albanian
Amharic (Ethiopian)
Armenian
Bahasa (Malaysian)
Bambara
Bengali
Bosnian
Chin
Chin (Falam)
Chin (Hakha)
Chin (Lai)
Chin (Lautu)
Chin (Mara)
Chin (Matu)
Chin (Mizo)
Chin (Tedim)
Chin (Zo, Zomi)
Chin (Zophei)
Croatian
Czech
Danish
Dari
Dutch
Finnish
French Creole
Fulani
Ga
German
Greek
Hausa
Hebrew
Hindi
Indonesian
Japanese
Kachin
Karen
Karenni (Kayah)
Kikongo
Kissi
Krahn
Lao
Latvian
Lingala
Lithuanian
Macedonian
Mandinka
Mongolian
Norwegian
Pulaar
Serbian
Slovene
Swedish
Tamil
Telugu
Thai
Tigrinya (Ethiopian)
Turkish
Twi
Ukrainian
Wolof
Yoruba

Grebo and Western Krahn also available for on-site, but not for phone or VRI

*** Hold times may vary**
Core Languages are in Blue

Languages are regularly being added to different modalities.

LUNA

LANGUAGE LIST

Additional Languages Available for Phone Interpreting

(Languages that are not yet available for on-site or VRI)

Acehnese
Acholi
Afghani
Akan
Akateco
Ashanti
Assyrian
Azeri
Bashkir
Basque
Bassa
Belarusian
Carolinian
Cebuano
Chaldean
Chamorro
Chao-Chow
Cherokee
Choujo
Chuukese
Dioula
Edo
Estonian
Ewe
Flemish
Foochow (Fuzhou)
French Canadian
Fukienese
Fulde
Fuzhou
Georgian
Hainanese
Hakka (Chinese)
Harar
Hassaniya
Hokkien
Icelandic
Ilocano
Ilonggo
Jarai
Jiangsu
K'iche'
Kannada
Karen (Pwo)
Kazakh
Khmer
Kikuyu
Kinyamulenge
Kituba
Kizigua (Kizigula)
Kosraean
Kunama
Kurdish
Kurdish (Bahdini)
Kurdish (Kurmanji)
Kurdish (Sorani)
Kyrgyz
Lorma
Luganda
Luo
Maay-Maay
Malay
Malayalam
Marathi
Marshallese
Mbay
Mende
Mien
Mina
Mixteco (Alto)
Mixteco (Bajo)
Moldovan
Montenegrin
More
Mushunguli
Navajo
Nuer
Oromifa
Patois (Jamaican)
Pidgin (Cameroonian)
Pidgin (Nigerian)
Ponapean/Pohnpeian
Portuguese Creole
Q'anjob'al
Rohingya
Samoan
Sango
Senthang
Shanghainese
Shona
Sichuan
Sicilian
Sinhalese
Siyin
Slovak
Somali Bantu
Soninke
Soninke (Sarahuli)
Soninke (Sarakhole)
Soranî (Kurdish)
Sousou
Sylheti
Taiwanese
Temne
Teochew
Toisanese
Tongan
Tosk
Trukese/Chuukese
Uzbek
Visayan
Xhosa
Yiddish
Yup'ik
Zapotec
Zulu

Available for Phone and VRI (on-site not yet available)

Cape Verde Creole
Cotocoli (Tem)
Dinka
Garre
Guarani
Krio
Mam
Tajik
Tibetan

Languages are regularly being added to different modalities.

LUNA

LUNA Language Services Interpreter and Translator

Code of Ethics, Professional Conduct and Confidentiality Statements

Introduction

LUNA Language Services ensures that all staff and contract interpreters and translators utilized to perform services are required to sign and agree to uphold specified professional and ethical standards. These ethical tenants support the standards for interpreters set by the National Council on Interpreting in Health Care (NCIHC), the Registry of Interpreters for the Deaf (RID), the American Bar Association (ABA), and other industry standard setting organizations, intend to support the provision of equal access to services under the Americans with Disabilities Act and Title VI of the Civil Rights Act, and protect privacy of personal information under the HIPAA (The Health Insurance Portability and Accountability Act).

Professional Conduct

1. Professional integrity: Interpreters and translators shall demonstrate professionalism and personal integrity, including: If the interpreter or translator believes he or she may have interpreted/translated inaccurately or incompletely, he or she will make this known and, if possible, provide a corrected interpretation/translation. If the interpreter or translator believes he or she is so impacted by the content to be interpreted/translated, that he or she becomes unable to interpret/translate accurately and completely, he or she shall inform the parties of his/her intent to withdraw without threat or retaliation.

2. Accuracy: Interpreters and translators shall render the message faithfully, conveying the content, spirit and cultural context of the original message. This means the interpreter or translator shall interpret everything the speaker or document says without changing the meaning, conveying what is said and how it is said, without additions, omissions or alterations, but with due consideration of the cultural context of both the sender and the receiver of the message.

3. Role boundaries: Interpreters and translators shall maintain the boundaries of their professional role, refraining from personal involvement. This does not mean that an interpreter cannot be friendly or develop a rapport with the person speaking, but does not represent personal involvement in their interpretation. An interpreter or translator must maintain impartiality and refrain from giving advice or projecting personal bias or opinion through their communication.

4. Self-evaluation: Interpreters and translators shall accurately and completely represent their certifications, education, training and experience.

5. Personal demeanor: Interpreters and translators shall be punctual, prepared and dressed in an appropriate manner and not distracting from the situation.

6. Inability to perform: Interpreters and translators shall assess, at all times, their ability to interpret/translate. Should interpreters or translators have any reservations about their competency to perform in any given situation, they must immediately notify the parties and offer to withdraw without threat or retaliation.

7. Professional development and training: Interpreters and translators shall make a reasonable effort to acquire ongoing development of their skills and knowledge through professional training, continuing education, and interaction with colleagues, and specialists in related fields.

8. Cultural competency: Interpreters and translators shall develop awareness of their own and other cultures in order to promote cross-cultural understanding. Interpreters and translators will strive to bridge the cultural differences between all participating parties, by seeking to minimize, and avoid potential misunderstandings based upon stereotyping and/or differing cultural practices, beliefs, or expectations. When clashing cultural beliefs or practices, a lack of linguistic equivalency, or the inability of parties to explain in their own words are encountered, the interpreter or translator may assist by sharing cultural information or helping develop an explanation that can be understood by all.

Confidentiality

1. Interpreters and translators treats as confidential and shall not divulge any information learned in the performance of professional duties. This includes any documents or other written materials.

2. Confidentiality is to be maintained in all situations, including sharing information with family members without instruction to do so, except when legally mandated to disclose information in specific situations such as child abuse, elder abuse, a person threatening harm to him or herself or others, or where the interpreter/translator determines to the best of their ability, that non-disclosure may result in harm.

3. Disclosure: Interpreters and translators shall not publicly discuss report, or offer an opinion concerning matters in which they are or have been engaged, even when the information is not privileged by law to be confidential.

Ethics

1. Cultural sensitivity & courtesy: Interpreters and translators shall be aware of the cultural differences that may exist and is sensitive and respectful to the individual(s) they serve.

2. Impartiality: The interpreter and translators shall maintain impartiality and shall not counsel, advice or project their own personal biases or beliefs. The interpreter shall avoid distorting the message in favor of one party or the other.

3. Non-discrimination: Interpreters and translators shall always be neutral, impartial and

unbiased. Interpreters/translators shall not discriminate on the basis of gender, disability, race, color, national origin, age, socio-economic or educational status or religious, political or sexual orientation.

4. Conflict of interest: Interpreters and translators shall disclose any real or perceived conflict of interest which would affect their objectivity in the delivery of services. Providing interpretation or translation services for family members or friends may violate the individual's right to confidentiality or constitute a conflict of interest.

5. Withdrawal: Interpreters and translators who are unable to ethically perform in a given situation shall refuse or withdraw from the assignment without threat or retaliation.

I, the undersigned, do hereby certify that I have read and will follow the standards set forth in the Code of Ethics, Professional Conduct and Confidentiality statement above in my role as a contract interpreter and/or translators for LUNA Language Services, Inc.

Signed By:

_____	_____	_____
Language Provider Signature	Printed Name	Date

Point to your language.
An interpreter will be called.

ARABIC	أشر إلى لغتك. سيتم استدعاء مترجم فوري.
BURMESE	သင့်ဘာသာစကားကို ညွှန်ပြပါ၊ စကားပြန် ခေါ်ပေးမည်။
BURMESE - HAKHA (CHIN)	Na hmanmi holh sawh tuah, holhlettu kan in auhpiak lai.
BURMESE - KACHIN	Tinang a amyu ga hpe madi madun u. Ga byan shaga mai ai.
BURMESE - KAREN	ဒုးနဉ်နတၢ်ကတိၤနကျိာ်တက့ၢ်. ပှၤကကိးန့ၢ်နၤ ပှၤကျိာ်ထံတၢ်.
BURMESE - KARENNI	စျၫဒီ ဇမ့မ်ဘဉ ဒမ့ဒဲဇမ့ဗဒုဟပ္ပ ဂၢမ်ိ ဘဉ်ဒဲ ဇမ့မ်ဒုမ့ဒဲ ဇဂၢမ့ဒဲမ့မ်ဏဒဲ ဇဉ
BURMESE - LISU	NU X ꓵꓶ M ꓲO: A XU: ꓲ. GO M M. GꓵLꓱ, GO LꓶNY NU Tꓱ. ꓲO: Lꓵ, Gꓵ: SU HW Gꓵ: ꓲO..
BURMESE - FALAM (CHIN)	Na ttong thiam mi kha sawh awla, ttong lettu kawhsak na si ding.
BURMESE - MIZO (CHIN)	I tong thiam kha khih rawh. Tonglettu an ko sak ang che.
BURMESE - MATU (CHIN)	Na mäh ol te khi or thui (Matu), ti atah nang ham ol leh kung te han khue pa ni.
BURMESE - TEDIM (CHIN)	Pau na deih pen kawk in. Kamphen ong ki sap sak ding hi.
BURMESE - ZO/ ZOPHEI (CHIN)	Naa rei kha suh la, rei pa leh aa ca awy pa ah

CHINESE CANTONESE	根據您的語言調用翻譯人員。
CHINESE MANDARIN	选择您的语言，我们会为您要求翻译。
FRENCH	Montrez-nous votre langue. On vous appellera un interprète.
HINDI	अपनी भाषा के ओर इशारा करें ,दुभाषयिा बुलाया जाएगा.
JAPANESE	あなたの言語を指差して下さい。通訳をお呼びいたします。
KOREAN	언어를 선택해주세요. 통역사를 호출해 드리겠습니다.
NEPALI	तपाईको भाषामा दर्शाउनुहोस्। एक अनुवादकलाई बोलाइनेछ।
PUNJABI	ਆਪਣੀ ਭਾਸ਼ਾ ਵਿੱਚ ਇਸ਼ਾਰਾ ਕਰੋ, ਇੱਕ ਦੁਭਾਸ਼ੀਏ ਨੂੰ ਬੁਲਾਇਆ ਜਾਵੇਗਾ
RUSSIAN	Укажите на ваш язык. Переводчика вызовут.
SOMALI	Tilmaan luuqadaada turjubaan baalaguuwici.
SPANISH	Indique su idioma. Un intérprete recibirá una llamada.
TAGALOG	Ituro ang iyong wika. Ipatatawag ang isang Tagasalin.

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LUNA

Trainings for State Personnel

LUNAlife

LUNAlife is a 5 minute video that tells the story of LUNA Language Services, our mission and manifesto as well as our statements of capabilities. This training video will quickly show the viewer LUNA's organizational structure with added contact information. Viewers will learn about how and why we do business in the language access communities.

LUNARequests

This short 15 minute presentation will clearly explain the request making process for all of our services lines, as well as typical response and turn-around times.

LUNAOps

This 20 minute video will show the viewers how they can access the client portal side of our scheduling and invoicing platforms. The goal would be for users to feel comfortable enough with the systems to promote self-navigation as a way to access pertinent information the user may need at a moment's notice. This video will also explain LUNA's accounting process, including invoicing, reporting and key personnel in our Accounting Department.

LUNAcademy

Through our LUNAcademy, we offer a myriad of trainings for clients and for interpreters. Meet the people who oversee LUNAcademy and learn more about our training goals and where to find more information on upcoming trainings.

LUNASL

Presented in ASL with English subtitles, this 10 minute video will share information on LUNA's unique relationship to Indiana's Deaf and hard of hearing communities from our Director of ASL Services and Education. Viewers will learn more about our ASL Department, staff interpreters and coordinators as well as what to expect when requesting an ASL interpreter.

LUNALanguages

Our Director of Language Services will share about the spoken language side of our business in this brief 10 minute video. Viewers will meet some of our language coordinators and learn more about our role in the various LEP communities we serve.

LUNATranslation

This 10 minute video will give the viewer a brief insight into LUNA's Translation Department from our Director of Translation. Viewers will learn more about Plunet, our translation management software, as well as meet a few of the people who will be overseeing your translation projects.

LUNACultures

Learning more about the cultural diversity of LUNA's language provision will give viewers specific information on the most frequently requested languages in the state of Indiana, as well as short descriptions of integral cultural information that will make the request process more efficient

LUNAcademy Trainings

Training plays a fundamental role in LUNA's mission of providing language services. The belief that language access is a right compelled LUNA to create LUNAcademy. Both a classroom and a service line, LUNAcademy houses all of LUNA's training endeavors. LUNAcademy offers trainings for three audiences: clients, consumers, and language service providers (interpreters and translators).

Client Trainings:

As Indiana's populous continues to diversify, there is a growing need for linguistically inclusive and culturally astute workplaces, schools, and non-for-profit organizations. To meet this growing need, LUNA offers both ready-made and customized trainings to satisfy clients' unique needs and preferences. Some training topics include:

- Diversity and inclusion
- Transportation and workforce development
- Removing barriers to employment
- Equitable hiring practices

Consumer Trainings:

LUNA supports individuals with limited English proficiency (LEP's) and has designed and taught:

- English Language Learners (ELL) Level 1
- English Language Learners (ELL) Level 2
- English Language Learners (ELL) Level 3

Additionally, LUNA provides ASL Language Mentoring services to Deaf individuals who need the support from trained ASL Specialists and/or Certified Deaf Interpreters.

Language Service Provider (LSP) Trainings:

To provide clients and consumers the best language services, LUNA assures that its language service providers have ample opportunity for training and professional growth. Training is offered on a great variety of topics, but highlights include:

- Bridging the Gap – a nationally-recognized basic training for medical interpreters
- EIPA Testing for ASL interpreters (Educational Interpreters Performance Assessments)
- Local Legal Lesson for beginning and intermediate court interpreters
- Study groups for Indiana Court Interpreter Certification

- Trainings on soft skills
- Interpreter skills trainings
- Interpreter wellness
- Ethics Parties

Emergency Operations and Disaster Preparedness Plan

While the Emergency Operations & Disaster Preparedness Plan at LUNA identifies the general operational procedures and key personnel that will be triggered in the case of an emergency or disaster. This document is meant to co-exist alongside our Business Continuity & Disaster Preparedness Plan, prepared and maintained for LUNA by Metric, Inc. LUNA is bound to maintain compliance with HIPAA, the Sarbanes-Oxley Act and general privacy requirements for the State of Indiana and many of our medical, legal and government clients. Based on the location of our office and the location of our data, we are at low risk for many natural disasters, however, if one should occur the following preventative and planned measures have been established at LUNA.

Communication Plan

1. Primary Disaster Manager (Marina Hadjioannou Waters, President) and backup Disaster Manager (Kelly Wright, Head of Operations) identified and trained on policies involving a disaster.
2. Secondary location to operate business is at a satellite office located [redacted].
3. Business Continuity & Disaster Preparedness Plan, Back up of Disaster Recovery Plan, insurance policies, and key financial documents are stored on-site in an inner-office file. A second set of the plans are stored at the offices of LUNA Attorney, [redacted].
4. All key personnel and their contact information listed in the plan (see addendum A), including IT Department, Building Manger, Security Company, Insurance Provider, Attorney, and all key contacts for State and other accounts.

Physical Security

1. The office building is secured and serviced by a security company which regularly monitored the premises and is available 24 hours a day for emergency response.
2. The office building is additionally secured by security cameras.
3. The office building is locked to the public outside of standard office hours (M-F: 7a-8p, Sa: 7a-4p).
4. The inner offices and main entries to the building are on a secure key fob system. During non-business hours, the LUNA office can only be accessed by pre-activated individual fobs, the use of which can be traced back to the specific fob owner.
5. Certain personnel have been issued inner offices with additional locked doors. These office doors are all individually locked. Access keys are issues to the individual and a master is held by [redacted].
6. The server room is locked at all times. Access key to this room is held only by [redacted], another executive officer of the company.
7. Most inner offices also have locked file cabinets to store data securely. Those keys are held only by the individual occupant of each office.

Operations and Workflow

1. All workflow and project management software necessary for scheduling and assigning interpreting jobs, as well as for managing all translation work, is located on either our server or a cloud-based system and can be accessed by password off-site if necessary.
2. Phone systems operate either through our internet provider OR through our cell phone vendor, and can be easily transferred in the case either system is compromised.
3. Established partnership with an IT service provider with 24 hour IT support.
4. Accounting and payroll records are stored both on our server and backed up in the offices of our accountant and HR service provider, respectively.

Privacy and Cyber Security

See Business Continuity Program & Master Plan.

Records Back Up

See Business Continuity Program & Master Plan.

Recovery Testing

See Business Continuity Program & Master Plan.

* Note: In our current dealings with the State of Indiana, all essential data needed for continuity of services is held BOTH by the State contract "owner" and our office. In the event of a disaster in our office, part of our recovery plan would be to immediately gather essential data from state representative.

Addendum A – Key Contracted Personnel

Continuity of Services (COVID-19)

During the past four months of changes related to COVID-19, LUNA quickly and successfully redirected language provision to meet guidelines provided by federal, state and local governments. While on-site interpreting requests are still fulfilled on a daily basis, many clients began to move trainings, telehealth visits and other essential meetings to an online environment. With less than a 24-hour notice of quarantine, LUNA was able to provide virtual interpreting that allowed clients to continue their language access obligations inside of this new way of conducting business.

LUNA's translation team successfully pivoted to supporting a large increase of rush turnaround requests during the start of the COVID-19 pandemic. The team assessed available resources, requested extended hours from partners, and created in-house translation teams to decrease turnaround times for COVID-19 messaging to record lows. Many of LUNA's processes supported effective shifts during emergency situations. The project managers were assigned to specific clients in order to harness that economies of scale. Additionally, teams of translators were created to specifically handle COVID-19 related projects. All of this was accomplished while maintaining continuity of services to our clients.

In the event that COVID requires the Scope of Work under this contract to adapt to government orders or public health recommendations, LUNA will follow the State of Indiana's lead and will be flexible with our duties as needed, while at all times to continue to provide undisrupted language access to Hoosiers.

Additional Community Contributions During COVID-19

- ASL interpreter provided to Governor Holcomb at public briefings on COVID-19.
- Created a COVID-19 Multilingual Resource Center webpage on the LUNA website.
- Partnered with Mayor Hogsett's Campaign to translate posters on reopening the City of Indianapolis in English , Spanish , Burmese , Arabic , Hindi , and French.
- Partnered with the Indiana Chapter of the American Red Cross to translate its Multilingual Campaign #DoingMyPart.
- ASL videos prepared for the Deaf community to explain community COVID-19 related issues COVID-19 Multilingual Resource Center.
- Weekly COVID expectations and requirements distributed to all contract interpreters for the protection of themselves and the participants in on-site interpreting appointments, including specialized training and PPE for all interpreters in contract with confirmed COVID-19 positive people or with potential exposure to COVID-19 in the community.
- Created specialized supplemental education services for Deaf or hard of hearing students moved to at-home eLearning environments.
- ASL interpreters provided for all Tippecanoe County Health Department public briefings.

Plunet

Plunet: Security Summary

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General

Plunet BusinessManager supports security systems like Reverse Proxy, Reverse Proxy + Security certificate, VPN, SSL-VPN, HTTPS, Security Gateways, Citrix Access Gateway, SonicWall Remote Access, Juniper Junos Pulse, Special Firewall systems, and many more.

The application will be scanned on a regular basis for security issues. In addition, we provide update guides to keep all Plunet software components up-to-date.

Besides that, there are multiple other measures that support Plunet's security standard now and in the future. This documents will guide you through the most important security methods and activities:

1. Test by External Company

The Web Application Penetration Test (blackbox/ greybox test) was executed by a security company assigned by one of Plunet's customers.

The penetration test consisted of the following:

- Foot printing of the infrastructure: application server, web server, intrusion detection, or prevention systems.
- Navigate the application, harvesting business intelligence to understand focal points and business objectives.
- Enumerate interfaces, authentication mechanisms, and insertion points.
- If deemed as meaningful, execute brute forcing attacks and check complexity policies.
- Identify frameworks, programming languages, and software integration mechanisms to highlight issues in libraries or supporting systems.
- First-level scanning through automated tools (if no business concern was identified in previous stages).
- Manual verification of identified potential issues and manual execution of crafted technical attacks.
- Iterative exploitation and discovery phases and execution of business focused attacks.
- Attempt at reiterating the attack expanding control to the operating system and local network, limited by the rules of engagement and attack perimeter.

2. Test by Associated Company

In addition to the penetration test, a partner company of Plunet tested different aspects of the application. The test specifications are based on the OSSTMM (www.osstmm.org) methodology and the ISO/IEC 27002 standard.

Furthermore, the following (security) measures were conducted:

- A daily test of the database consistency takes place.
- Tested by two partner companies.

- https (secure connection) is supported.
- No external influence on the software possible (prevented by the application).
- Test of the whole system by internal quality management.
- Source code check with the tool “Checkstyle”.
- Frequent audits with the tools: PMD, FindBugs, Jdepend.

3. Validating User Input

Any user input is automatically filtered and validated. The system will not accept any code, scripts, HTML or strings containing SQL syntax. This reduces the risk of code injection and cross-site scripting.

General information about cross-site scripting:
https://www.owasp.org/index.php/Cross-site_Scripting_(XSS)

General information about code injection:
https://www.owasp.org/index.php/Code_Injection

4. Session Management

An integrated session management layer ensures that only one active session per user login is active. Duplicate sessions will be invalidated automatically. Furthermore, an inactive session will be invalidated after a configurable timeout.

5. Cookie Vulnerability Protection

Plunet BusinessManager uses browser cookies to retain a user’s session. To prevent an attacker hijacking this cookie - and therefore the user session - it is necessary to take some measures. Our server environment (Apache Tomcat) provides several options to protect the user from session hijacking:

- **Secure**: this attribute tells the browser to only send the cookie if the request is being sent over a secure channel such as HTTPS. This will help protect the cookie from being passed over unencrypted requests. If the application can be accessed over both, HTTP and HTTPS, cookies can be sent in clear text.
- **HttpOnly**: this attribute is used to help prevent attacks, such as cross-site scripting, since it does not allow the cookie to be accessed via a client side script like JavaScript.
- **Path**: in addition to the domain, the URL path, for which the cookie is valid, can be specified. Only if the domain and URL path match, the cookie will be sent in the request. Just as with the domain attribute, if the path attribute is set too loosely, it could leave the application vulnerable to attacks by other applications on the same server. For example, if the path attribute was set to the web server root "/", the application cookies will be sent to every application within the same domain.

General information about session hijacking:
https://www.owasp.org/index.php/Session_hijacking_attack

6. Encryption

Sensitive data like credit card or login information is saved within the database. To prevent unauthorized access, we save this kind of information only encrypted.

Furthermore, all passwords (e.g. database connection and ldap-clients) within the Plunet configuration file are saved only encrypted.

We highly recommend to use HTTPS for your Plunet system. Instructions for the HTTPS setup are available in the knowledge base of the Plunet ticket system. The instructions also include a recommended configuration to guarantee the best security.

For more information, please contact our support team.

7. Rights Management

Plunet BusinessManager has a rights management system integrated. Users can only see features and data according to their role, user profile and their access rights. To give users solely access to areas, features and information they are authorized to see, Plunet lets you manage the structure of access rights and profiles individually or based on user groups in Plunet's admin area.

8. Password Policy

In Plunet BusinessManager it is possible to define a password policy individually for all user types (internal resources, external resources, and customers) with the following options:

- Minimum password length.
- Password validity.
- The password must contain:
    - Lower case
    - Capital letters
    - Numbers
    - Special characters
- New password must not identical with the prior four passwords.
- Option to disable the browser password saving possibilities.

An Active Directory integration with SSO (Single Sign On) is also possible (additional module).

Data Security Related to Emails Sent to Interpreters/Clients

Atrium sends emails to our third-party email service provider utilizing HTTPS encrypting technology. At the email service provider, the emails are sent out utilizing TLS encrypting technology when it is supported by the receiving mail server. In the exchange, the email service provider also checks the validity and legitimacy of the mail server's certificate.

Data Security Related to Main Atrium Application

Access to the Atrium is granted by the customer or Atrium staff. Each user is given a unique login ID (email address) and an initial password. The password is required to be changed when the user logs in for the first time. The combination of the IP address of the website used to access the Atrium, login ID and password determine the server/database combination that the user accesses. If an interpreter, for example, provides services for multiple companies that utilize the Atrium for their interpretation scheduling and management, the interpreter must log in separately for each company. Each company's data is stored physically on separate databases so that at no time is any of the data co-mingled. All passwords are stored as hashes so that only the user will know his password because Atrium administrators and database administrators will never see it.

LSP Ware recognizes that many of our customers have their own agency-wide standards for password management, such as requiring passwords to be a certain number of characters, contain numbers or special characters, change periodically, etc. In an upcoming version, the customers will be able to incorporate those password standards into the Atrium.

Atrium is provided as SaaS (software as a service) and can be accessed via any browser. All communications from the browser to the Atrium server are secured as all communications happen over HTTPS protocol. This is a secure TLS connection that uses strong protocol version and cipher suite. This guarantees bidirectional (from browser to server and also from server to browser) encryption of all communications. The data is encrypted using an AES 256 bit encryption algorithm. This is currently the "gold standard" encryption technique. This information can be verified by using browser tools that allow users to view the certificates of a secured website. This protects against man-in-the-middle attacks and thus prevents eavesdropping and tampering.

Atrium also allows customers to integrate with Atrium via APIs exposed by Atrium. These are additionally protected by including a signature for authentication purposes. The signature is required to be included in all API requests. This signature is 256 bit hash created by the Atrium application using 32 bit salt. This guarantees the verification of a valid, authentic user and it prevents any impersonation in

case of man-in-the-middle attacks. Please note that these signed APIs use the same secured HTTPS protocol mentioned above for communication, and these signed APIs are again encrypted with a 256 bit algorithm.

LSP Ware contracts with a third-party to host the virtual servers that the Atrium runs on. Activity logs are created daily and maintained for at least 90 days. These activity logs are maintained in a separate application from Atrium with different login IDs and passwords that are maintained solely by LSP Ware staff. The activity logs are available for review. The third-party hosting provider maintains firewalls and other network security measures that are not publicly disclosed. The physical servers are located behind locked and guarded doors with restricted access to the raised floor where servers are physically located.

Back-ups of the data are made daily. The back-ups take place only on the internal network of the data center so that there is no risk of interception outside of the network.

Data Security Related to Mobile Atrium Application

Access to the mobile application is granted by the customer. The same unique login ID and password from the main application are used for the mobile application. Communications between the user's mobile device and the application layer are encrypted in the same manner as the Atrium application itself.

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SECURITY IS OUR PRIORITY

Using an industry-leading Cloud Communications platform enables us to provide secured and scalable interpretation services anywhere with an internet connection or phone line.

ACCESSIBILITY

Phone - Guaranteed 99.95% monthly uptime for communication services across multiple regions, with multiple fallback endpoints allowing calls that are unable to continue to seamlessly carry over to a fallback line.

Web - Real Time Communication Enables audio (OPI) and video (VRI) communication to web browsers (Chrome, Firefox, Microsoft Edge) without a need for a plug-in; Internet Explorer and Safari require a flash plug-in for use, access on mobile devices is supported by a native app

Minimum Bandwidth - 400kb/s for Audio, 1MB/s for Video.

PRIVACY

File Encryption - Transparent Data Encryption encrypts data at the file level and protects the encryption keys with certificates to prevent exposure of stored data.

Field Encryption - 256-bit version of SHA encrypts database fields including email addresses, address information, phone numbers and patient personal identifiers.

Communication Encryption - All endpoints for communication are fully encrypted with TSL/SSL Access Security Access to stored data is granted on a "need to know" basis and uses the principle of "least privilege" through appropriate roles; server infrastructure is only available through secure VPN, infrastructure is not internet accessible, requests are encrypted using https 443, use of cloud based SMTP service to implement spam filtering and anti-virus measures.

INFRASTRUCTURE

Our infrastructure is solely managed through cloud-based, highly scalable data centers The application is designed and manages in alignment with the best security practices and a variety of IT security standards as well as industry-specific standards including HIPAA and Cloud Security Alliance

Security & Confidentiality

Security Standards

CLI adheres to the following security and confidentiality standards:

- Privacy Shield Framework certification through the U.S. Department of Commerce
- Certification for compliance with PCI Data Security Standards
- Annual HIPAA (Health Insurance Portability and Accountability Act) certification required of all CLI employees and contractors
- HITECH (Health Information Technology for Economic and Clinical Health) Act and Gramm-Leach-Bliley Act compliance
- CLI's call centers are supervised 24/7, with security-card access to corporate office and both call center locations
- Mandatory password protection on all computers
- Internal network access is protected by a two-factor VPN authentication, multiple firewalls, and digital certification
- CLI does not document, store, or process any customer information that has not been specifically requested for billing
- CLI does not access our clients' systems or records in any way

Interpreter Security

Our interpreters must read, understand, and adhere to the following security and confidentiality standards:

- Confidentiality and HIPAA Business Associate Agreement
- Code of Professional Ethics
- Interpreter Basic Conduct and Procedures
- Statement of Neutrality, Confidentiality, and Protection of Customer Information
- Fraud, waste, and abuse prevention

Our interpreters are also required to:

- Work in a secure work environment, free from distraction
- Have proper window coverings in place to obscure view from the outside
- Promptly shred notes after each interpreting session, or immediately erase any notes taken on white boards
- Use a secure landline; cell phones, speakerphone, or phones that use VoIP (voiceover internet protocol) technologies are prohibited

Strategic Communication & RFPs

At CLI, we pride ourselves in holding true to high standards for communication and business partnerships. We find it very important to answer all questions you may have in order to arm yourself with the knowledge needed

ADDENDUM C

EU GDPR (General Data Protection Regulation 2016/679) Compliance Document

This Data Protection Addendum ("**Addendum C**") forms part of the Principal Agreement between: (i) _____ (**"Subcontractor" or** "**Vendor**"**)** acting on its own behalf and as agent for each Vendor Affiliate; and (ii) LUNA ("**Company**"). In consideration of the mutual obligations set out herein, the parties hereby agree that the terms and conditions set out below shall be added as an Addendum to the Principal Agreement. Except as modified below, the terms of the Principal Agreement shall remain in full force and effect.

1. **Definitions**

1.1.1 "Data Controller" means a person who, alone or jointly with others, determines the purposes and means of the processing of Personal Data;

1.1.2 The Company is a "Data Processor" and the Vendor is the "Subprocessor" of Personal Data.

1.1.3 "Data Processor" means a natural person, company, agency or other entity which processes personal data on behalf of a Data Controller.

1.1.4 "Data Subprocessor" means any Subcontractor or Affiliate acting as a further Data Processor on behalf of Company.

1.1.5 "Data Subject" means an identified or identifiable natural person. An identifiable natural person is one who can be identified, directly or indirectly, in particular by reference to an identifier such as a name, an identification number and location data, among others."

1.1.6 "Personal Data" means information relating to a Data Subject or other information considered to be personal data under GDPR that is processed by Company and a "Data Subprocessor" on behalf of the Data Controller to or in connection with the Principal Agreement;

1.1.7 "Data Protection Laws" means EU Data Protection Laws and, to the extent applicable, the data protection or privacy laws of any other country;[1]

1.1.8 "Company Affiliate" means an entity that owns or controls, is owned or controlled by or is or under common control or ownership with Company;

1.1.9 "Vendor Affiliate" means an entity that owns or controls, is owned or controlled by or is or under common control or ownership with Vendor, where control is defined as the possession, directly or indirectly, of the power to direct or cause the direction of the management and policies of an entity, whether through ownership of voting securities, by contract or otherwise.

1.1.10 "Company Group Member" means Company or any Company Affiliate;

[1] This drafting is intended to include laws replacing the GDPR in the UK after Brexit.

1.1.11 "Contracted Processor" means Vendor or a Subprocessor (including any third party and any Vendor Affiliate, but excluding an employee of Vendor or any of its sub-contractors) appointed by or on behalf of Vendor or any Vendor Affiliate to Process Personal Data on behalf of any Company Group Member in connection with the Principal Agreement;

1.1.12 "Restricted Transfer" means a transfer of personal data to any Data Processor or Subprocessor located in a country outside the European Economic Area.

1.1.13 “Processing”, “processed” or “process” (whether capitalized or not) means any operation or set of operations which is performed on Personal Data or on sets of Personal Data, whether or not by automated means, such as collection, recording, organization, structuring, storage, adaptation or alteration, retrieval, consultation, use, disclosure by transmission, dissemination or otherwise making available, alignment or combination, restriction, erasure or destruction.

1.1.14 “Security Breach” means any breach of security, misuse, compromise, or unauthorized access to Personal Data or any other act or omission that leads to the accidental or unlawful destruction, loss, alteration, unauthorized disclosure of, or access to, Personal Data.

2 Authority

2.1 Vendor warrants and represents that, before any Vendor Affiliate Processes any Personal Data on behalf of any Company Group Member, Vendor's entry into this Addendum as agent for and on behalf of that Vendor Affiliate will have been duly and effectively authorized by that Vendor Affiliate.

3 Processing of Personal Data

3.1 To the extent Personal Data is transferred from the European Economic Area and/or its Member States to countries outside the European Economic Area (a "Restricted Transfer"), the Company (as "data processor") and Vendor (as "data subprocessor") hereby agree to abide to the standard contractual clauses set out in Directive 95/46/EC of the European Parliament and of the Council, which have been incorporated in the terms of this addendum.

3.2 Vendor and each Vendor Affiliate shall comply with all applicable Data Protection Laws in the Processing of Personal Data as set forth in the Principal Agreement; and not Process Personal Data other than on the relevant Company or Company Group Member’s documented instructions unless Processing is required by Applicable Laws to which the relevant Contracted Processor is subject, in which case Vendor or the relevant Vendor Affiliate shall to the extent permitted by Applicable Laws inform the relevant Company or Company Group Member of that legal requirement before the relevant Processing of that Personal Data.

3.2 Vendor shall not otherwise use, sell, rent, transfer, distribute, or otherwise disclose or make available Personal Data for vendor’s own purposes or for the benefit of anyone other than the Company’s Data Controller.

3.3 Company may create an Annex 1 to this Addendum sets out certain information regarding the Contracted Processors' Processing of the Personal Data as required by article 28(3) of the GDPR. Company may make reasonable amendments to Annex 1 by written notice to Vendor from time to time as Company reasonably considers necessary to meet those requirements.

4 Vendor and Vendor Affiliate Personnel

4.1 Vendor and each Vendor Affiliate shall take reasonable steps to ensure the reliability of any employee, agent or contractor of any Contracted Processor who may have access to the Personal Data, ensuring in each case that access is strictly limited to those individuals who need to know / access the relevant Personal Data, as strictly necessary for the purposes of the Principal Agreement, and to comply with Applicable Laws in the context of that individual's duties to the Subprocessor, ensuring that all such individuals are subject to confidentiality undertakings or professional or statutory obligations of confidentiality.

5 Security

Taking into account the state of the art, the costs of implementation and the nature, scope, context and purposes of Processing as well as the risk of varying likelihood and severity for the rights and freedoms of natural persons, Vendor and each Vendor Affiliate shall in relation to the Personal Data implement appropriate technical and organizational measures to ensure a level of security appropriate to that risk, including, as appropriate, the measures referred to in Article 32(1) of the GDPR and as the standard contractual clauses set out in Directive 95/46/EC of the European Parliament and of the Council, which have been incorporated in the terms of this addendum.

5.1 In assessing the appropriate level of security, Vendor and each Vendor Affiliate shall take account in particular of the risks that are presented by Processing, in particular from a Personal Data Breach.

5.2 Vendor and each Vendor Affiliate shall only transmit Personal Data through a Company's approved secure solution. Duration of access shall be restricted to the minimum time for which access is required. Vendor and each Vendor Affiliate shall use safeguards to protect against any compromise, unauthorized access or other damage to Company's systems and network.

5.3 Vendor and each Vendor Affiliate shall at least annually, evaluate and monitor the effectiveness of its information security program, and shall promptly adjust and/or update as reasonably warranted by the results of such evaluation and monitoring. Upon request, Vendor and each Vendor Affiliate shall promptly provide Company with a copy of Vendor's applicable security standards, policies, procedures, and guidelines (which Company shall treat as Confidential Information).

5.4 If requested by Company, **Vendor and each Vendor Affiliate shall provide a controls audit report and remediation effort, such as** an information security audit as applicable to the Services being provided, which has been performed within the past year. The audit shall include an assessment of Vendor's applicable Security, Availability, Processing Integrity, Confidentiality and Privacy controls, processes and procedures to ensure compliance with applicable laws, regulations and industry standards**.**

6 Subprocessing

6.1 Each Company Group Member authorizes Vendor and each Vendor Affiliate to appoint (and permit each Subprocessor appointed in accordance with this section **6** to appoint) Subprocessors in accordance with this section **6** and any restrictions in the Principal Agreement.

6.2 If requested by Company or Company Group Member, Vendor and each Vendor Affiliate shall promptly send a copy of any sub-processor agreement it concludes to the Company or Company Group Member

(which may be redacted to remove confidential commercial information not relevant to the requirements of this Addendum).

6.3 Vendor and each Vendor Affiliate may continue to use those Subprocessors already engaged by Vendor or any Vendor Affiliate as at the date of this Addendum, subject to Vendor and each Vendor Affiliate in each case as soon as practicable meeting the obligations set out in section **6.4**.

6.4 Vendor shall give Company prior written notice of the appointment of any new Subprocessor, to include details of the Processing to be undertaken by the Subprocessor. If, within 48 hours of receipt of that notice, Company notifies Vendor in writing of any objections (on reasonable grounds) to the proposed appointment:

6.5 With respect to each Subprocessor, Vendor or the relevant Vendor Affiliate shall:

6.5.1 before the Subprocessor first Processes Personal Data (or, where relevant, in accordance with section (**6.3**), carry out adequate due diligence to ensure that the Subprocessor is capable of providing the level of protection for Personal Data required by the Principal Agreement and in accordance with Article 46 of the GDPR;

6.5.2 ensure that the arrangement between Vendor or the relevant Vendor Affiliate and Subprocessor, is governed by a written contract including terms which offer at least the same level of protection for Personal Data as those set out in this Addendum and meet the requirements of article 28(3) of the GDPR;

6.5.3 if that arrangement involves a transfer to a subprocessor outside the European Economic Area (Restricted Transfer), ensure an adequate level of data protection within the meaning of GDPR, in accordance to the standard contractual clauses set out in Directive 95/46/EC of the European Parliament and of the Council, which have been incorporated in the terms of this addendum.

6.6 Vendor and each Vendor Affiliate shall ensure that each Subprocessor performs their obligations as they apply to Processing of Personal Data carried out by that Subprocessor, as if it were party to this Addendum in place of Vendor.

7 Data Subject Rights

7.1 Taking into account the nature of the Processing, Vendor and each Vendor Affiliate shall assist each Company Group Member by implementing appropriate technical and organizational measures, insofar as this is possible, for the fulfilment of the Company Group Members' obligations, as reasonably understood by Company, to respond to requests to exercisee Data Subject rights under the Data Protection Laws.

7.2 Vendor shall promptly notify Company if any Contracted Processor receives a request or objection from a Data Subject under any Data Protection Law in respect of Personal Data; and ensure that the Contracted Processor does not respond to that request except on the documented instructions of Company or the relevant Company Affiliate or as required by Applicable Laws to which the Contracted Processor is subject, in which case Vendor shall to the extent permitted by Applicable Laws inform Company of that legal requirement before the Contracted Processor responds to the request.

7.3 Vendor and vendor affiliates acknowledge that a data subject can bring a claim arising out of a breach of the obligations referred to in this addendum against Vendor and sub-processor with regard to its own processing operations under the terms of this addendum as if it were the data exporter or the data processor. The liability of the Vendor and sub-processor shall be limited to their own processing operations under the clauses.

8 Personal Data Breach

8.1 Vendor shall notify Company without undue delay (and at the latest within 24 hours of becoming aware) upon Vendor or any Subprocessor becoming aware of a Personal Data Breach affecting Company Personal Data, providing Company with sufficient information to allow each Company Group Member to meet any obligations to report or inform Data Subjects of the Personal Data Breach under the Data Protection Laws.

8.1 Vendor shall take such reasonable commercial steps as are directed by Company to assist in the investigation, mitigation and remediation of each such Personal Data Security Breach and prevent any further Personal Data Security Breach in accordance with applicable privacy rights, laws, regulations and standards.

8.2 Vendor shall reimburse Company for costs it incurs in responding to, remediating, and/or mitigating damages caused by a Personal Data Breach, including all costs of notice and/or remediation, or in following up a complaint by a Data Subject or a regulator.

9 Data Protection Impact Assessment and Prior Consultation

Vendor and each Vendor Affiliate shall provide reasonable assistance to each Company Group Member with any data protection impact assessments, and prior consultations with Supervising Authorities or other competent data privacy authorities, which Company reasonably considers to be required of any Company Group Member by article 35 or 36 of the GDPR or equivalent provisions of any other Data Protection Law, in each case solely in relation to Processing of Personal Data by, and taking into account the nature of the Processing and information available to, the Contracted Processors.

10 Return of Personal Data

10.1 At any time during the term of this Agreement, at Company's request or promptly upon the termination or expiry of this Agreement for any reason, Vendor and each Vendor Affiliate shall promptly return to Company all records and data containing Personal Data in any format and on storage media that Company may reasonably specify, and all copies, whether in written, hard copy electronic or other form or media, of Personal Data.

10.2 By request, vendor shall provide written certification to Company that it and each Vendor Affiliate has fully complied with this section after the completion of project.

10.3 Each Contracted Processor may retain Personal Data to the extent required by Applicable Laws and only to the extent and for such period as required by Applicable Laws and always provided that Vendor and each Vendor Affiliate shall ensure the confidentiality of all such Personal Data and shall ensure that such Personal Data is only Processed as necessary for the purpose(s) specified in the Applicable Laws requiring its storage and for no other purpose.

10.1 Destruction of Personal data

10.1.1 Vendor and each Vendor Affiliate shall promptly and in any event within five [05] calendar days of the completion of project involving the Processing of Personal Data, destroy and procure the destruction of all copies of that Personal Data.

10.1.2 Alternatively, with Company's prior written approval, Vendor may securely delete and dispose of all such copies of the Personal Data, provided that Vendor provides Company with a certificate of secure destruction.

11 Audit rights

11.1 Vendor and each Vendor Affiliate shall make available to each Company Group Member on request its facilities, procedures and documentation and all information necessary to be inspected to demonstrate compliance with this Addendum, and shall allow for and contribute to audits, including inspections, by any Company Group Member or an auditor mandated by any Company Group Member in relation to the Processing of the Personal Data by the Contracted Processors.

11.2 Information and audit rights of the Company Group Members only arise under section **11.1** to the extent that the Principal Agreement does not otherwise give them information and audit rights meeting the relevant requirements of Data Protection Law (including, where applicable, article 28(3)(h) of the GDPR).

11.3 A Company Group Member may only mandate an audit if the auditor is identified in the list set out in Annex 3 to this Addendum, as that list is amended by agreement between the parties in writing from time to time. Vendor shall not unreasonably withhold or delay agreement to the addition of a new auditor to that list.

11.4 Company or the relevant Company Affiliate undertaking an audit shall give Vendor or the relevant Vendor Affiliate reasonable notice of any audit or inspection to be conducted under section **11.1** and shall make (and ensure that each of its mandated auditors makes) reasonable endeavors to avoid causing (or, if it cannot avoid, to minimize) any damage, injury or disruption to the Contracted Processors' premises, equipment, personnel and business while its personnel are on those premises in the course of such an audit or inspection. A Contracted Processor need not give access to its premises for the purposes of such an audit or inspection: to any individual unless he or she produces reasonable evidence of identity and authority; outside normal business hours at those premises, unless the audit or inspection needs to be conducted on an emergency basis and Company or the relevant Company Affiliate undertaking an audit has given notice to Vendor or the relevant Vendor Affiliate that this is the case before attendance outside those hours begins; or for the purposes of more than [one] audit or inspection, in respect of each Contracted Processor, in any [calendar year], except for any additional audits or inspections which:

11.4.1 Company or the relevant Company Affiliate undertaking an audit reasonably considers necessary because of genuine concerns as to Vendor's or the relevant Vendor Affiliate's compliance with this Addendum; or

11.4.2 A Company Group Member is required or requested to carry out by Data Protection Law, a Supervisory Authority or any similar regulatory authority responsible for the enforcement of Data Protection Laws in any country or territory, where Company or the relevant Company Affiliate undertaking an audit has identified its concerns or the relevant requirement or request in its notice to Vendor or the relevant Vendor Affiliate of the audit or inspection.

12 Restricted Transfers

12.1 To the extent Personal Data is transferred from the European Economic Area and/or its Member States to countries outside the European Economic Area (a "Restricted Transfer"), the Company (as "data processor") and Vendor (as "data subprocessor") hereby agree to abide to the standard contractual clauses set out in Directive 95/46/EC of the European Parliament and of the Council, which have been incorporated in the terms of this addendum.

12.2 Section **12.1** shall not apply to a Restricted Transfer unless its effect, together with other reasonably practicable compliance steps (which, for the avoidance of doubt, do not include obtaining consents from Data Subjects), is to allow the relevant Restricted Transfer to take place without breach of applicable Data Protection Law as well as any written permissions from the Company as required within this agreement.

13 General Terms

13.2 Governing law and jurisdiction.

The parties to this Addendum hereby submit to the choice of jurisdiction stipulated in the Principal Agreement with respect to any disputes or claims howsoever arising under this Addendum, including disputes regarding its existence, validity or termination or the consequences of its nullity; and Subject to section **13.2**, with regard to the subject matter of this Addendum, in the event of inconsistencies between the provisions of this Addendum and any other agreements between the parties, including the Principal Agreement and including (except where explicitly agreed otherwise in writing, signed on behalf of the parties) agreements entered into or purported to be entered into after the date of this Addendum, the provisions of this Addendum shall prevail.

Company, Company Group Member, Vendor, Vendor Affiliate and subprocessors acknowledge that any claim arising from the Data Subject relating to a data breach for sub-processing obligations referred to in Section 6, 7 and 13 shall be governed by the law of the Member State in which the data exporter is established.

13.3 Changes in Data Protection Laws.

Company may by at least 30 (thirty) calendar days written notice to Vendor from time to time make any variations to the Standard Contractual Clauses, as they apply to Restricted Transfers which are subject to a particular Data Protection Law, which are required, as a result of any change in, or decision of a competent authority under, that Data Protection Law, to allow those Restricted Transfers to be made (or continue to be made) without breach of that Data Protection Law; and propose any other variations to this Addendum which Company reasonably considers to be necessary to address the requirements of any Data Protection Law.

13.4 If Company gives notice, Vendor and each Vendor Affiliate shall promptly co-operate (and ensure that any affected Subprocessors promptly co-operate) to ensure that equivalent variations are made to any agreement put in place; and Company shall not unreasonably withhold or delay agreement to any consequential or proposed variations to this Addendum proposed by Vendor to protect the Contracted Processors against additional risks associated with the variations made. Further the companies will negotiate in good faith with a view to agreeing and implementing those or alternative variations designed to address the requirements identified in Company's notice as soon as is reasonably practicable.

13.5 **Severance**

Should any provision of this Addendum be invalid or unenforceable, then the remainder of this Addendum shall remain valid and in force. The invalid or unenforceable provision shall be either (i) amended as necessary to ensure its validity and enforceability, while preserving the parties' intentions as closely as possible or, if this is not possible, (ii) construed in a manner as if the invalid or unenforceable part had never been contained therein.

13.6 **Material Breach**

Vendor acknowledges that any breach of its covenants or obligations set forth in this Addendum may cause Company harm for which monetary damages would not be adequate compensation and agrees that, in the event of such breach or threatened breach, the Data Subject and/or Data Controller is entitled to seek equitable relief, including a restraining order, injunctive relief, specific performance and any other relief that may be available from any court, in addition to any other remedy to which the Data Subject/Data Controller may be entitled at law or in equity. Vendor agrees to reimburse Company for all costs incurred by Vendor or Vendor Affiliate in connection with, or arising out of, an unauthorized disclosure of data, including the costs incurred in connection with the following:

13.6.1 the cost of notice of any disclosure be provided to any individuals, regulators, law enforcement agencies, consumer reporting agencies, or others as required by law or regulation, or in Company's discretion;

13.6.2 any remediation that may be offered to affected persons (including actual reasonable costs incurred in providing individuals affected by the security breach with complimentary credit 13.7 Vendor's failure to comply with any of the provisions of this Addendum is a material breach of this Agreement, which may not be cured. In such event, Company may terminate the Agreement effective immediately upon written notice to Vendor without further liability or obligation to Company.

13.6.3 monitoring services, credit protection services, credit fraud alerts, and/or similar services which Company in its sole discretion deems necessary to protect such affected individuals); and,

13.6.4 any fines, penalties or findings from any governmental or regulatory authorities. Vendor agrees to cooperate with Company, at Vendor's sole cost and expense, in any litigation or other formal action against third parties deemed necessary to Company to protect its rights.

13. 7 Such remedies shall not be deemed to be exclusive but shall be in addition to all other remedies available at law or in equity, subject to any express exclusions or limitations in this Agreement to the contrary.

14. Indemnification

See Section 5 of the main agreement: “Indemnification”.

15. Signatures

IN WITNESS WHEREOF, this Addendum is entered into and becomes a binding part of the Principal Agreement with effect from the date first set out above.

Vendor

ADDRESS LINE 1
CITY, STATE ZIP

By (name): _____

Signature: _____

Date Signed: _____

LUNA HIPAA Compliance Program

To ensure compliance with HIPAA's privacy and security rule, LUNA has an elaborate HIPAA Compliance Program including annual external third-party audits, a robust IT data security monitoring protocol through a third party; and regularly publishes educational material for its interpreters and staff, including a section on HIPAA Highlights in its monthly newsletter. LUNA staff also receive extensive HIPAA training during onboarding and are required to participate in regular reviews of key tenants of the law. This training is part of LUNA's overarching policy on confidentiality, as reflected in its Code of Ethics, Employee Handbook, and subcontractor agreements.

Protected Health Information

LUNA also has in place a comprehensive set of technical, physical, and administrative safeguards to prevent the unauthorized use or disclosure of protected health information (PHI). LUNA works closely with its IT-service provider and, when needed, a third-party HIPAA compliance auditor to develop, implement, and refine these safeguards. These safeguards include, among other things:

- Restricted access to the company's server and workstations
- Encryption of electronically-transmitted data
- Monitoring of system security threats, such as malware and computer viruses
- Policies and procedures for disaster preparedness and business continuity.

Business Associate Agreements

HIPAA rules generally require covered entities and business associates to enter into contracts, known as business associate agreements (BAAs). Among other things, these agreements:

- Require the business associate to implement appropriate safeguards against the unauthorized use or disclosure of PHI;
- Establish the permissible uses and disclosures of PHI by the business associate; and
- Require the business associate to report any breaches of unsecured PHI.

To accommodate its clients, LUNA has developed its own BAA template based on model provisions developed by the U.S. Department of Health & Human Services. These agreements, available to clients upon request, are modified to reflect the specific services performed and additional security safeguards as necessary.

Subcontractor Agreements

BAA obligations flow down not only from the covered entity to LUNA but also from LUNA to any organization or individual with which it contracts for services. For that reason, LUNA incorporates "flow-down" provisions in its subcontractor agreements, imposing the same PHI privacy and security obligations as the BAAs require of LUNA.

Training and Education

HIPAA compliance is central to the training and continuing education of LUNA's language service providers. Examples include the following:

- Mandatory HIPAA training for all new employees and compliance by Contractors;

- Periodic testing materials;
- A presentation on basic HIPAA obligations and best practices is shared with all language service providers before they start working with us as Contractors;
- A HIPAA "primer," publicly available on LUNA's website, summarizing compliance obligations, defining key terms and phrases, and offering, practical tips and resources; and
- Monthly newsletters sent to all LUNA interpreters with a section on *HIPAA Highlights*, offering practical pointers on preventing unauthorized disclosure of PHI.

Security of Electronic Data

In the maintenance and transmission of electronic PHI, LUNA takes several steps to ensure the highest security standards. Policies and procedures include, among other things, the following:

- Around-the-clock, centralized monitoring and maintenance of mission-critical IT systems by Metric, Inc., LUNA's IT-service provider;
- Contingency-operation and disaster-recovery planning to ensure business continuity and restoration of lost data in the event of an emergency;
- Facility access controls to limit physical access to the facilities in which LUNA houses its electronic information systems;
- Encryption of translation materials using Plunet, a web-based project-management system;
- Document destruction, as appropriate, upon completion of all client assignments; and
- Revocation of access to online accounts and return of mobile devices and electronic storage media upon the termination of an employee or independent contractor relationship.

❖ *LUNA Language Services is compliant with the EU General Data Protection Regulation 2016/679 (GDPR) which requires special precautions, reporting, and data deletion be made for all data involving EU citizens.*

❖ *LUNA Languages Services proudly holds Certifications 17100:2015 and Certification 19001:2015 for translation and interpretations services, respectively, from the International Organization for Standardization.*

HIPAA COMPLIANCE		BOOSTLINGO HIPAA COMPLIANCE	
HIPAA REQUIREMENT	HIPAA REFERENCE	WHAT	HOW
SECURITY INCIDENT MANAGEMENT	164.308 (a)(4)(ii)(B,C)	Tracking unauthorized access attempts in an effort to reduce risk and exposure to threats from outside network attacks and malware.	All application server infrastructure and logging data are only available via secure VPN access. Automated testing tools (IDS/IPS) are supplied by hosting environment and run on schedule. Inbound and outbound packet filtering provided by network access control lists and security groups. DDoS resilient architecture and mitigation systems automatically detect and filter excess traffic. System utilizes advanced logging and Monitoring. Access to cloud provider follows RBAC and use least privilege which can only access modules necessary for their legitimate purpose. DB infrastructure is not internet accessible. Can only be accessed by internal authorized IP's only. Application server infrastructure and logging data are only available via secure VPN access. DB infrastructure is not internet accessible. Can only be accessed by internal authorized IP's only. Access to cloud provider follows RBAC and use least privilege which can only access modules necessary for their legitimate purpose
ACCESS MANAGEMENT	164.308 (a)(4)(ii)(B,C) 164.308 (a)(5)(ii)© 164.312 (a)(2)(i) 164.312 (a)(2)(ii) 164.312 (a)(2)(iii) 164.312 (c)(1,2)	Information is only decrypted for authorized access users only	256 AES Encryption in transit and at Rest. All requests to/from our servers are made over encrypted https (TLS 1.2) using only the most secure cipher suites. Our database instance, and all of its backups, are encrypted at the volume level.
ENCRYPTION and DECRYPTION	164.312 (a)(2)(iv) 164.312 (e)(2)(i) 164.312 (e)(2)(ii) 164.312 (c)(2)	File and Application Level encryption	256 AES Encryption in transit and at Rest. Boostlingo uses a secure cloud services platform, offering compute power, database storage, content delivery and other functionality to host, maintain and deploy the solution across all platforms. Boostlingo infrastructure is a multitenant public cloud solution with the ability to segregate data by tenant on their own dedicated instance. All User information is encrypted in the Boostlingo DB.
KEY MANAGEMENT	164.312 (e)(2)(i)	Key management via secure web management system	Utilize IAM roles to change access keys and revoke credentials. Keys and passphrases are only readable by the system root user. The access keys are securely stored in a key management service provided by our cloud host provider. This is required to startup the instances since we use volume level encryption. Only the necessary development/operations members at BoostLingo, have access to this key service. The key management service we utilize takes advantage of Hardware Security Modules to protect the security of the keys. The service is built on systems that are designed to protect the master keys with extensive hardening techniques such as never storing plaintext master keys on disk, not persisting them in memory, and limiting which systems can access hosts that use keys.

LOGGING AND AUDIT CONTROLS	164.312 (b)	Data Event logs generated daily and maintained	HTTPS is the only form of communication allowed to the BoostLingo API. The SSL certificate can (and should) be validated in the client's web browser. Mobile apps also consume the same API and will prevent access if the certificate does not match or is no longer valid.Boostlingo captures the following: • Server reboot/shutdown/start up events • Software package and update events • System administrator logins and login attempts • Device failure and hardware error codes • Application logs include: o Call completion o Service interruptions o Device heartbeato Call errors Customers do not have direct access to their own system logs, but can be supplied to them upon request to Boostlingo. All user login failures are logged. All security incidents are escalated to senior technical staff and when found to be true threats are logged against internal ticketing system for mitigation.
MONITORING	164.308 (a)(1)(ii)(D)	Monitoring access to PHI	Boostlingo monitors all servers and network hardware the application is running on. Internal and external monitoring checks all of the monitored devices at 5 second intervals. Roles Based Management can be used to restrict access to those users who should not have access to PHI information. All user activity is logged.
SECURITY INCIDENT MANAGEMENT	164.308 (a)(1)(ii)	Identify incidents if they occur to quickly remedy	Security incidents are communicated to administrators through email/text/phone call and require recognition to close incident or same notifications remains open and hits additional administrators. All security incidents are logged in the security incident register. Security incidents, when and if detected, are handled at the highest priority by working with the Hosting environment. All data is encrypted, hashed and salted. All security incidents are escalated to senior technical staff and when found to be true threats are logged against internal ticketing system for mitigation.

Security & Confidentiality

Security Standards

CLI adheres to the following security and confidentiality standards:

- Privacy Shield Framework certification through the U.S. Department of Commerce
- Certification for compliance with PCI Data Security Standards
- Annual HIPAA (Health Insurance Portability and Accountability Act) certification required of all CLI employees and contractors
- HITECH (Health Information Technology for Economic and Clinical Health) Act and Gramm-Leach-Bliley Act compliance
- CLI's call centers are supervised 24/7, with security-card access to corporate office and both call center locations
- Mandatory password protection on all computers
- Internal network access is protected by a two-factor VPN authentication, multiple firewalls, and digital certification
- CLI does not document, store, or process any customer information that has not been specifically requested for billing
- CLI does not access our clients' systems or records in any way

Interpreter Security

Our interpreters must read, understand, and adhere to the following security and confidentiality standards:

- Confidentiality and HIPAA Business Associate Agreement
- Code of Professional Ethics
- Interpreter Basic Conduct and Procedures
- Statement of Neutrality, Confidentiality, and Protection of Customer Information
- Fraud, waste, and abuse prevention

Our interpreters are also required to:

- Work in a secure work environment, free from distraction
- Have proper window coverings in place to obscure view from the outside
- Promptly shred notes after each interpreting session, or immediately erase any notes taken on white boards
- Use a secure landline; cell phones, speakerphone, or phones that use VoIP (voiceover internet protocol) technologies are prohibited

Strategic Communication & RFPs

At CLI, we pride ourselves in holding true to high standards for communication and business partnerships. We find it very important to answer all questions you may have in order to arm yourself with the knowledge needed

Required HIPAA Notice: Important Legal Notice for "HIPAA Business Associates" of LUNA Regarding Protected Health Information

In the course of performing under this Agreement, Subcontractor may provide services that involve the use and disclosure of Protected Health Information ("PHI") and, in those circumstances, Subcontractor is, by law, a "HIPAA Business Associate" of LUNA. Both LUNA and all HIPAA **Business Associates must comply with the legal requirements set forth in the Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), the Health Information Technology for Economic and Clinical Health Act ("HITECH"), and the rules and regulations promulgated thereunder including but not limited to the "Privacy Rule," the "Security Rule," and the "Breach Notification Rule,"** which are found at 45 C.F.R. Parts 160, 162 and 164 (collectively referred to as the "HIPAA Rules"). To ensure compliance with such legal requirements, both LUNA and Subcontractor are required by law to adhere to the following terms and conditions to protect the privacy of individuals' PHI; specifically, how such PHI is created, transmitted, maintained, controlled, and handled by LUNA and Subcontractor.

1. Definitions

The following terms used in this Agreement shall have the same meaning as those terms in the HIPAA Rules, as defined below: "Breach," "Business Associate," "Covered Entity," "Data Aggregation," "Designated Record Set," "Disclosure," "Health Care Operations," "Individual," "Minimum Necessary," "Notice of Privacy Practices," "Protected Health Information," "Required By Law," "Secretary," "Security Incident," "Subcontractor," "Unsecured Protected Health Information," and "Use."

"HIPAA Rules" shall mean the Privacy, Security, Breach Notification, and Enforcement Rules at 45 CFR Part 160 and Part 164.

2. Obligations and Activities of Subcontractor

2.1. Use and Disclosure of Protected Health Information. As Business Associate, Subcontractor shall not use or disclose Protected Health Information ("PHI") other than as permitted or required by this Agreement or as required by law.

2.2. Use of Appropriate Security Safeguards. As Business Associate, Subcontractor shall use appropriate safeguards, as specified in Sections 2.11 and 2.12 below and in compliance with Subpart C of 45 CFR Part 164 with respect to electronic PHI, to prevent use or disclosure of PHI other than as provided for by the Agreement.

2.3. Reporting of Unauthorized Use of PHI. As Business Associate, Subcontractor shall, immediately upon discovery, report to Primary Contractor any use or disclosure of PHI not provided for by the Agreement of which it becomes aware, including breaches of unsecured PHI as required at 45 CFR 164.410, and any security incident of which it becomes aware.

2.4. Subcontractors Use of Subcontractors. In accordance with 45 CFR 164.502(e)(1)(ii) and 164.308(b)(2), if applicable, Subcontractor, as Business Associate, shall ensure that any of its subcontractors that create, receive, maintain, or transmit PHI on behalf of Subcontractor agree to the same restrictions, conditions, and requirements that apply to Subcontractor with respect to such information.

2.5. Production of PHI. As Business Associate, Subcontractor shall make available PHI in a designated record set to Primary Contractor as necessary to satisfy Primary Contractor's obligations under 45 CFR 164.524.

2.6. Amendments to PHI. As Business Associate, Subcontractor shall make any amendment(s) to PHI in a designated record set as directed or agreed to by the Primary Contractor pursuant to 45 CFR 164.526, or take other measures as necessary to satisfy Primary Contractor's obligations under 45 CFR 164.526.

2.7. Accounting of Disclosures. As Business Associate, Subcontractor shall maintain and make available the information required to provide an accounting of disclosures to Primary Contractor as necessary to satisfy Primary Contractor's obligations under 45 CFR 164.528.

2.8. Privacy of Individually Identifiable Health Information. To the extent Subcontractor, as Business Associate, is to carry out one or more of Primary Contractor's obligation(s) under Subpart E of 45 CFR Part 164, Subcontractor shall comply with the requirements of Subpart E that apply to the Primary Contractor in the performance of such obligation(s).

2.9. Production of Internal Policies, Practices, Books, and Records. As Business Associate, Subcontractor shall make its internal practices, books, and records available to Primary Contractor for purposes of determining compliance with the HIPAA Rules. If LUNA is unable to conduct an on-site inspection of Subcontractor's internal practices, books, and records, Subcontractor shall produce copies of such documents in a manner determined by the Parties and at a mutually agreed upon cost.

2.10. Facilities Access. In connection with any visits to LUNA's facilities or that of its clients, or access to LUNA's or its clients' systems, Subcontractor, as Business Associate, agrees to comply with all on-site and remote access rules and procedures communicated by LUNA or its client, including all sign-in, badging, escort, and restricted access requirements, and shall exercise reasonable care and appropriate judgment in connection therewith so that LUNA can demonstrate compliance with the law.

2.11. Security Safeguards Evaluation; Security Threat Monitoring and Response. As Business Associate, Subcontractor shall evaluate and adjust its safeguards, policies, and procedures as necessary to respond to evolving security threats (such as malware and computer viruses); keep pace with generally accepted industry standards and best practices; and comply with the HIPAA Rules and other applicable laws and regulations pertaining to the privacy, security, integrity, retention, disposal, use, and disclosure of PHI.

So that LUNA can demonstrate compliance with the law, Subcontractor, and any of its subcontractors, agree to:

- Install minimum-security software on all devices used to perform work under this Agreement;
- Complete and return to LUNA the Subcontractor Computer Management Agreement, attached hereto as **Addendum C**;
- If requested, submit to periodic review by LUNA or LUNA's agent of devices used to perform work under this Agreement to ensure the proper installation of minimum-security software and for review of potential vulnerabilities or deficiencies; and
- Promptly correct any vulnerabilities or deficiencies identified by LUNA or LUNA's agent.

2.12. Encryption of Electronically-Transmitted PHI. Both Parties, as Business Associates, shall encrypt all PHI transmitted, received, processed, or maintained on electronic media, both while in transit and at rest, in accordance with the guidance established under the HIPAA Rules to "Render Unsecured Protected Health Information Unusable, Unreadable, or Indecipherable to Unauthorized Individuals," as amended.

3. Permitted Uses and Disclosures by Subcontractor

3.1. Use and Disclosure Specifically Permitted by this Agreement. As Business Associate, Subcontractor may only use or disclose protected health information as necessary to perform the services set forth in this Agreement.

3.2. Use and Disclosure Permitted by Law. As Business Associate, Subcontractor may use or disclose protected health information as required by law.

3.3 Use and Disclosure Limited to Minimum Necessary. As Business Associate, Subcontractor shall make uses and disclosures and requests for protected health information consistent with Primary Contractor's minimum necessary policies and procedures.

3.4 Privacy of Individually Identifiable Health Information. As Business associate, Subcontractor shall not use or disclose protected health information in a manner that would violate Subpart E of 45 CFR Part 164 if done by Primary Contractor.

4. Provisions for Primary Contractor to Inform Subcontractor of Privacy Practices and Restrictions

4.1. Notice of Limitations. Primary Contractor shall notify Subcontractor of any limitation(s) in the notice of privacy practices of Primary Contractor under 45 CFR 164.520, to the extent that such limitation may affect Subcontractor's use or disclosure of PHI.

4.2. Notice of Changes. Primary Contractor shall notify Subcontractor of any changes in, or revocation of, the permission by an individual to use or disclose his or her PHI, to the extent that such changes may affect Subcontractor's use or disclosure of PHI.

4.3. Notice of Restrictions. Primary Contractor shall notify Subcontractor of any restriction on the use or disclosure of PHI that Primary Contractor has agreed to or is required to abide by under 45 CFR 164.522, to the extent that such restriction may affect Subcontractor's use or disclosure of PHI.

5. Notification of Unintended Use or Disclosure of Protected Health Information as Required by Law

5.1. Notification Generally. As Business Associate, Subcontractor shall, upon discovery, promptly report to LUNA in writing any use or disclosure of PHI not provided for in this Agreement or in violation of the HIPAA Rules or other applicable law, including any and all actual and potential breaches and security incidents including breaches of unsecured PHI in accordance with the Breach Notification Rule (each an "unintended use or disclosure").

5.2. Existence of Substantial or Ongoing Risk of Harm; Duty to Notify. If the unintended use or disclosure presents a substantial or ongoing risk of harm to LUNA, its clients, or individuals, or if the unintended use or disclosure affects or may affect the PHI of five hundred (500) or more individuals, Subcontractor shall—in addition to submitting a written report as specified in Section 5.3 below—report the unintended use or disclosure to LUNA by email or telephone promptly and no later than forty-eight (48) hours after Subcontractor becomes aware of the unintended use or disclosure.

5.3 Information Required in Report. The report required under Sections 5.1 and 5.2 above shall include, at a minimum, the following information:

(A) A brief description of what happened, including the date of the incident and the date of the discovery of the incident, if known;

(B) A description of the types of PHI that were involved in the incident (such as whether full name, social security number, date of birth, home address, account number, diagnosis, disability code, or other types of information were, or are reasonably believed by Subcontractor to have been, impermissibly accessed, acquired, used or disclosed);

(C) Identification of the individual whose PHI has been, or is reasonably believed to have been, accessed, acquired, used, or disclosed;

(D) A brief description of what Subcontractor is doing to investigate the incident, mitigate harm to individuals, and protect against any further incidents; and

(E) Any other information reasonably requested by LUNA to be included in the report so that LUNA can demonstrate compliance with the law.

5.4. Mitigation of Harm; Bargaining of Costs Related to Incident. As Business Associate, Subcontractor shall take all reasonable actions necessary to investigate, respond to, and mitigate the harmful effects of the unintended use or disclosure. As further required by law, Subcontractor shall provide status updates and any information and assistance and cooperation requested by LUNA in connection therewith; and unless otherwise required by law or agreed to by the Parties, it shall be the responsibility of LUNA to communicate with its clients, affected individual(s), the Secretary of the U.S. Department of Health and Human Services, and the media, any information regarding the unintended use or disclosure, subject to the Parties bargaining over which party shall bear the costs of resolving the incident, paying the costs of investigation, notification, and mitigation.

6. Obligations of Subcontractor Upon Termination of Agreement

6.1. Return or Destruction of PHI. Upon termination of this Agreement for any reason, Subcontractor shall return to Primary Contractor (or, if agreed to by Primary Contactor, destroy) all PHI received from Primary Contractor, or created, maintained, or received by Subcontractor on behalf of Primary Contractor, that the Subcontractor still maintains in any form. Subcontractor shall retain no copies of the PHI. LUNA may require an affirmation from Subcontractor, or any of its subcontractors, certifying compliance with this Section 6.1.

6.2. Survival. The obligations of Subcontractor under this Section shall survive the termination of this Agreement.

7. Miscellaneous

Any ambiguity in this Agreement shall be interpreted to permit compliance with the HIPAA Rules.

IN WITNESS WHEREOF, this Addendum is entered into and becomes a binding part of the Principal Agreement with effect from the date first set out above.

Vendor

Signature _____

Name _____

Title _____

Date Signed _____

LUNA Language Services

Signature _____

Name _____

Title _____

Date Signed _____

ISO Process Basics

ISO, the International Organization for Standardization, is an independent, non-governmental international organization that develops standards to ensure the quality, safety and efficiency of products, services and systems. Standards are best described as formulas that depict the best way of doing something and are developed from the distilled wisdom of people with expertise in their subject matter and who know the needs of the organizations they represent (manufacturers, sellers, buyers, customers, trade associations, users or regulators).

As of August, 2017, there were 21,740 published ISO Standards, and they cover a wide range of activities: a few examples include manufacturing a product, managing a process, and delivering a service. By committing to the requirements of these International Standards, LUNA's consumers can have confidence that the services we provide will be reliable and of good quality.

LUNA Language Services currently holds certifications in two of these standards:

- **ISO 9001:2015 Quality Management Systems**
- **ISO 17100:2015 Translation Services**

LUNA welcomes the opportunity to support language access to the state of Indiana. The accuracy, quality, and timely delivery of the translation requests will be managed by LUNA's team certified to ISO 9001:2015 and 17100:2015.

LUNA has developed a robust project management and quality control system for its translation department based on these international standards. From the initial client interaction to the delivery of the translated documents, the ISO certifications (audited and approved by a third-party ISO auditor) assure a series of cross-checks and workflow controls that benefit the translation process.

LUNA's extensive team of translators includes highly trained experts with both language skills and industry-specific knowledge that guarantee a document translation's integrity.

The ISO translation process includes:

Translation by qualified translators who also review their effort for accuracy and consistency.

Revision and Proofreading by a second translator who reviews the source and target text checking for document errors and other issues.

Final Verification by the project manager who assures that the translated document aligns with the client's translation objectives.

More detailed information about our ISO certified processes is included in Addendum R.2 ISO Quality Policy.

ORION ASSESSMENT SERVICES

CERTIFICATE

COMPANY NAME

LUNA Language Services

8935 N. Meridian Street, Suite 250, Indianapolis,
Indiana, 46260, USA

STANDARD

ISO 17100:2015

Translation Services – Requirements for translation services

SCOPE STATEMENT

Translation Service

The organization has undergone a comprehensive audit and meets the requirements of the standard noted above according the Language Sector Certification Scheme.

LANGUAGE SECTOR · LSCS · CERTIFICATION SCHEME ™

January 23, 2020	January 23, 2022
DATE OF ISSUE	**EXPIRY DATE**
CERTIFICATE N°	**OR-9060**

DAVID HUEBEL, PRESIDENT
ORION ASSESSMENT

ORION ASSESSMENT SERVICES
1201 DUNDAS ST. EAST, SUITE 209
TORONTO, ONTARIO, M4M 1S2

Orion Registrar, Inc.
Thorough and Fair Auditing

Certificate of Certification

This is to certify the Quality Management System of:

LUNA Language Services
8935 N. Meridian Street, Suite 250
Indianapolis, IN 46260 USA

Has been assessed by Orion Registrar and found to be in compliance with the following Quality Standard:

ISO 9001:2015

The Quality Management System is applicable to:

Provision of Translation and Interpretation Services

The Certification period is from

February 13, 2020 to February 12, 2023

This certification is subject to the company maintaining its system to the required standard, and applicable exceptions, which will be monitored by Orion.

Client ID: 9760 Certificate ID: 1018397

ANAB ANSI National Accreditation Board ACCREDITED ISO/IEC 17021-1 MANAGEMENT SYSTEMS CERTIFICATION BODY

MEMBER OF MULTILATERAL RECOGNITION ARRANGEMENT IAF

February 13, 2020
Paul M. Burck, President *Date*

7502 W. 80th Avenue, Suite 225, Arvada, Colorado 80003 | 303-456-6010 | FAX 303-456-6681 | www.orion4value.com
To authenticate this certificate, please visit: www.orion4value.com/about-orion/registered-companies/

LUNA

17100 & 9001
TIQMS EDITION

VERSION: **3.20**

SERIAL #: LUN-02192019-00120

Translation & Interpretation Quality Management System: ISO 17100 & ISO 9001

The LUNA Language Services Quality Policy:

Senior Leadership of LUNA Language Services has established, implemented and maintains this Quality Policy as part of its Translation and Interpretation Quality Management System.

LUNA Language Services has been determined through its Management Reviews that this Quality Policy is appropriate to the purpose and context of LUNA Language Services and supports its strategic direction.

LUNA Language Services provides a framework for setting translation and interpretation quality objectives through its Management Reviews.

LUNA Language Services is committed to satisfy all the applicable requirements, including the current versions of ISO 9001 and ISO 17100;

LUNA Language Services is committed to continual improvement of the Translation and Interpretation Quality Management System through its Internal Audits, Management Reviews and Continual Improvement Projects.

This Quality Policy is available and maintained as documented information per P-DC Documentation Control and P-IEC Internal and External Communications;

This Quality Policy is communicated, understood and applied within LUNA Language Services;

This Quality Policy is available to relevant interested parties, as appropriate per P-IEC Internal and External Communications.

This Quality Policy was established by the Senior Leadership of LUNA Language Services and approved by the CEO through P-MR Management Review.

Quality Targets and Objectives:

Quality Targets and Objectives reflect:

- The health of the MS for accomplishing the processing and delivery of services in accordance with the customer's stated requirements,
- The client's and relevant interested parties perception of LUNA Language Services,
- The regulatory health of LUNA Language Services, relevant to its compliance with the applicable laws and regulations,

Quality and Business targets and objectives are determined by the Senior Leadership and defined using metrics to track performance. Quality and Business targets and objectives are established and reviewed as part of P-MR Management Review.

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VERSION: **3.20**

SERIAL #: LUN-02192019-00120

Translation & Interpretation Quality Management System: ISO 17100 & ISO 9001

System Element:	Title:
Process:	**P-CA Corrective Actions**
Oversight Leadership:	***Head of Operations***
Additional Responsibilities:	• ***Senior Leadership*** • ***Responsible Managers***

Process Description:

The process defines the requirements for addressing the areas where corrective actions are required to address departures, issues and/or deficiencies in the Management System and/or product/services provided to clients. This also includes any complaints and/or notices from applicable regulatory agencies/entities.

This process applies to: Internally generated corrective actions (i.e. Internal Audit corrective actions, non-conforming products/services, etc.) and Externally generated corrective actions (Certification Body audit non-conformances, client complaints, regulatory complaints, etc.).

MS Manual - Click Here

Referenced Documents, Forms and Records – Links and Locations	
Title	**Location**
MS Manual	LUNA Language Services ConformanceWare TIQMS TS Edition v3.2
P-DC Documentation Control	Everyday Docs>Level II Documents>
P-CI Continual Improvement	Everyday Docs>Level II Documents>
P-MR Management Review	Everyday Docs>Level II Documents>
Records	Everyday Docs>Level IV Documents>Records>
CAR-F Corrective Action Report (Blank)	Tech Tools>Forms>
CAR Corrective Action Report (In-Process or Completed)	Everyday Docs>Level IV Documents>Records>[Year]>CAR>
CARTL-F Corrective Action Tracking List (Blank)	Tech Tools>Forms>
CARTL Corrective Action Tracking List (In-Process or Completed)	Everyday Docs>Level IV Documents>Records>[Year]>CARTL>
TCM-F Training and Competence Matrix (Blank)	Tech Tools>Forms>
TCM Training and Competence Matrix (In-Process or Completed)	Everyday Docs>Level IV Documents>Records>[Year]>TCM>

Process:

Step:	Task to be Accomplished:	Inputs Necessary to Accomplish this Task:	Outputs from This Task, Including Verifiable Documentation
1	**NOTE:** For externally generated corrective actions, the reporting will also include responses in the format as mandated by the external entity (if any) along with the documentation designated below. As required by the external entity, updates and/or documentation will be provided to the entity. If required by the external entity, the entity's agent will be included as part of the team (see below).	Requirements mandated by the external entity	Documentation mandated by the external entity
2	Whenever personnel notice, or are notified, of a departure from the Management System (MS), or any issues with a product/service, that person will immediately e-mail their Responsible Manager(s) or their Department Director and cc iso@luna360.com.	MS requirements Specific MS Process(es) affected Product/project requirements	Verbal or email notification to appropriate member of Senior Leadership or Responsible Manager
3	The ISO compliance team will determine whether or not the identified issue qualifies as needing Corrective Action. If it does, the compliance team will issue a CAR number from the CARTL Tracking List, fill in the applicable columns on the CARTL tracking list, and provide the Responsible Manager or Department Director with a pre-titled CAR. The Responsible Manager or Department Director will start filling out the CAR with the applicable information. **NOTE:** In the case where the departure or issue affects multiple departments, the ISO compliance team will assist Senior Leadership or Responsible Managers with deciding who will take the overall leadership for ensuring that the departure or issue, and the resulting documentation, are documented and updated as necessary. The balance of the Senior Leaders or Responsible Managers will remain as a team to resolve the departure or issue.	CAR-F Corrective Action Report CARTL-F Corrective Action Tracking List	In-process CAR Corrective Action Report Updated CARTL Corrective Action Tracking List When applicable, an individual assigned for overall responsibility for a multi-department issue.
4	**Team:** Senior Leadership or Responsible Managers will assemble a team of knowledgeable or affected personnel to address the departure or issue. The team members will be documented on the CAR.	TCM-F Training and Competence Matrix In-process CAR Corrective Action Report	Team members documented on in-process CAR Corrective Action Report

For Reference Only

Step:	Task to be Accomplished:	Inputs Necessary to Accomplish this Task:	Outputs from This Task, Including Verifiable Documentation
	Team of One: In some cases, only one member of Senior Leadership or Responsible Manager is required to address the departure or issue.	Affected personnel	
5	**Critical Departure or Issue:** If the departure or issue is of a critical nature that affects operations or products/services delivered to the client, a member of Senior Leadership or a Responsible Manager will halt all, or the relevant parts, of the process until interim actions can be put in place. **CEO, President, and Head of Operations Notification:** In the case of a critical departure or issue, a member of Senior Leadership or Responsible Manager will notify the CEO, President, and Head of Operations by email of the issue and the immediate actions taken. The member of Senior Leadership or Responsible Manager will keep the CEO, President, and Head of Operations informed at each step of the corrective action process.	In-process CAR Corrective Action Report Organization Chart in MS Manual	CEO, President, and Heads of Operations notification email
6	The member of Senior Leadership or Responsible Manager and team will determine the interim actions necessary to immediately address the departure or issue and document it on the CAR and update the CARTL.	In-process CAR Corrective Action Report CARTL CAR Tracking List	In-process CAR Corrective Action Report In-process CARTL CAR Tracking List
7	The member of Senior Leadership or Responsible Manager and team will investigate and determine the Root Cause of the deficiency or Issue and document it on the CAR and update the CARTL.	In-process CAR Corrective Action Report In-process CARTL CAR Tracking List	In-process CAR Corrective Action Report In-process CARTL CAR Tracking List Associated documentation from investigation and Root Cause Analysis
8	Based on the results of the investigation and the Root Cause Analysis, a member of Senior Leadership or the Responsible Manager and team will determine the corrective action(s) to be implemented and update the CAR and CARTL.	In-process CAR Corrective Action Report In-process CARTL CAR Tracking List Associated documentation from investigation and Root Cause Analysis	In-process CAR Corrective Action Report In-process CARTL CAR Tracking List Associated documentation from investigation and Root Cause Analysis

For Reference Only

Step:	Task to be Accomplished:	Inputs Necessary to Accomplish this Task:	Outputs from This Task, Including Verifiable Documentation
9	If the corrective actions require revisions or additions to the Management System (MS), the member of Senior Leadership or Responsible Manager will accomplish the draft of the changes per the process P-DC Documentation Control.	P-DC Documentation Control	Draft revisions or additions of applicable MS documentation
10	**Prior to implementation**, a member of Senior Leadership or the Responsible Manager will submit copies of the CAR, any draft revisions or additions, and all supporting documentation to the Head of Operations for approval. If the CAR is deemed critical, any draft revisions or additions, and all supporting documentation will be sent to the Head of Operations, CEO, and President.	In-process CAR Corrective Action Report Draft revisions or additions of applicable MS documentation Associated documentation from investigation and Root Cause Analysis	Copies of the CAR Corrective Action Report, any draft revisions or additions, and all supporting documentation sent to the Head of Operations for Non-Critical CARs, and to the Head of Operations, President and CEO for critical CARs.
11	**Approval of Non-Critical CARs:** On receipt, the Head of Operations will review and approve all documentation. If the corrective actions are deemed appropriate, the Head of Operations will notify the Director or Responsible Manager by email to proceed with the corrective actions. **Approval of Critical CARs**: The CEO or President will review and approve all documentation. **Disapproval of Non-Critical CARs:** If the Head of Operations disapproves the corrective actions, the Head of Operations will notify the member of Senior Leadership or the Responsible Manager of the disapproval with the justification by email. The Head of Operations may decide to be part of the team to resolve the departure or issue. **Disapproval for Critical CARs:** If the CEO or President disapproves the corrective actions, the CEO or President will notify the member of Senior Leadership or Responsible Manager of the disapproval with the justification by email. The CEO may decide to be part of the team to resolve the departure or issue.	In-process CAR Corrective Action Report Any draft revisions or additions, All supporting documentation (if applicable)	Email notification of approval or disapproval and justification from the CEO (if applicable)
12	**Approved:** If the corrective actions have been approved, the member of Senior Leadership or Responsible Manager will proceed with	In-process CARTL CAR Tracking List	Email notification of approval or disapproval

For Reference Only

Step:	Task to be Accomplished:	Inputs Necessary to Accomplish this Task:	Outputs from This Task, Including Verifiable Documentation
	implementation of the corrective actions and update the CARTL. **Disapproved:** If the corrective actions are disapproved, the member of Senior Leadership or Responsible Manager and the team will return to the appropriate step above and continue the process. **Return to Process**		Updated CARTL CAR Tracking List
13	Once corrective actions have been implemented, a member of Senior Leadership or the Responsible Manager will monitor the process(es) and collect data or other evidence to validate the corrective actions are effective and have mitigated the departure or issue. **Ineffective:** If the corrective actions prove to be ineffective, a member of Senior Leadership or Responsible Manager and the team will return to the appropriate step above and continue the process and update the CARTL. **Return to Process**.	In-process CAR Corrective Action Report In-process CARTL CAR Tracking List	Data or other evidence collected from the process(es) on effectiveness Updated CARTL CAR Tracking List
14	Once the corrective actions have been determined to be effective, the member of Senior Leadership or Responsible Manager will notify the Head of Operations for non-critical CARs, or the Head of Operations, CEO, <u>and</u> President for critical CARs. The Head of Operations will verify the effectiveness of non-critical corrective actions and sign-off on the CAR and update the CARTL. The CEO or President will verify the effectiveness of critical corrective actions and sign-off on the CAR and update the CARTL. At this point the CAR is Closed.	Verification data or evidence In-process CAR Corrective Action Report In-process CARTL CAR Tracking List	Closed CAR Corrective Action Report in Records Updated CARTL CAR Tracking List
15	All CARs will be reviewed by the Operations team and any other team members deemed necessary to determine if there is an opportunity to apply the corrective actions to another process to avoid any similar departure or issue. If such an opportunity is determined to exist, the Operations team will notify the affected department(s), the CEO or President and initiate a continual improvement project.	MS Manual P-CI Continual Improvement Closed CAR Corrective Action Report	Documentation per Corrective Actions or Continual Improvement (as applicable)

For Reference Only

Step:	Task to be Accomplished:	Inputs Necessary to Accomplish this Task:	Outputs from This Task, Including Verifiable Documentation
16	Once the CAR is closed, a member of Senior Leadership or Responsible Manager will send the CAR, all supporting data, documentation and emails to iso@luna360.com. A member of the Operations Team will file the documents in Everyday Docs>Level IV Documents>Records>[Year]>CAR>. The member of Senior Leadership or Responsible Manager may opt to contact the Operations Department and confirm when the data was filed.	MS Manual	CAR Corrective Action Report, all supporting data, documentation and emails
17	**Management Review:** All CARs and the CARTL will be reviewed as part of the P-MR Management Review Process	P-MR Management Review	Documentation per Management Review
18	**Next Process:** P-DC Documentation Control	P-DC Documentation Control	None

Revision History:

Revision Date	Rev. #	Revision Description/Details	Approved by:
08/12/2019	Release	New System Release to: • ISO 9001:2015 Quality management systems -- Requirements • ISO 17100:2015 - Translation services — Requirements for translation services • ISO 13611:2014 – Interpreting -- Guidelines for community interpreting	CEO
1/22/2020	001	Revised title line in header from "Translation & Interpretation Quality Management System: ISO 9001, ISO 17100 & ISO 13611" to "Translation Quality Management System: ISO 9001 & ISO 17100."	
1/27/2020	002	Revised header - removed 13611	

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17100 & 9001
TIQMS EDITION

VERSION: **3.20**

SERIAL #: LUN-02192019-00120

Translation & Interpretation Quality Management System: ISO 17100 & ISO 9001

System Element:	Title:
Process:	**P-CI Continual Improvement**
Responsible Owner:	***Department Directors***
Additional Responsibilities:	• ***All Personnel (for suggesting Continual Improvements)*** • ***CEO & President (for approving CIs initiated by Directors)***

Process Description:

This process defines the requirements for conducting and tracking continual improvement projects.

MS Manual - Click Here

Referenced Documents, Forms and Records – Links and Locations	
Title	**Location**
P-MR Management Review	Everyday Docs>Level II Documents>
CIPR-F Continual Improvement Project Record (Blank)	Tech Tools>Forms>
CIPR Continual Improvement Project Record (In-Process or Completed)	Everyday Docs>Level IV Documents>Records>[Year]>CIPR>
CIPTL-F Continual Improvement Project Tracking List (Blank)	Tech Tools>Forms>
CIPTL Continual Improvement Project Tracking List (In-Process or Completed)	Everyday Docs>Level IV Documents>Records>[Year]>CIPTL>

Process:

Step:	Task to be Accomplished:	Inputs Necessary to Accomplish this Task:	Outputs from This Task, Including Verifiable Documentation
1	**NOTE:** All personnel are encouraged to look for areas of improvement in the Management System and the Business.	None	None
2	When a staff person notices an area that could be improved (i.e. Productivity, the Management System, compliance with legal requirements, the business, etc.) the person will e-mail their Responsible Manager(s) or their Department Director and cc iso@luna360.com. If a Department Director identifies a potential improvement, the Director will e-mail the CEO or President and cc iso@luna360.com.	Blank CIPR-F Continual Improvement Project Record form	Initial CIPR - (Project Name)

Step:	Task to be Accomplished:	Inputs Necessary to Accomplish this Task:	Outputs from This Task, Including Verifiable Documentation
	The ISO compliance team will determine whether or not the identified improvement qualifies as needing a CIPR-F Continual Improvement Project Record form. If the improvement requires a CIPR-F, the person who suggested the improvement will document the improvement details in the CIPR-F Continual Improvement Project Record form (which will be provided by the ISO team), and will give the proposed continual improvement a project name. (**Note:** This is not an official document/record until approved).		
3	The person will submit the initial CIPR-F to their Department Director via email and cc iso@luna360.com. If a Department Director identifies the potential improvement, the initial CIPR-F will be submitted to the CEO or President and cc'd to iso@luna360.com.	Initial CIPR - (Project Name)	Email with Initial CIPR - (Project Name)
4	The Department Director (CEO/President, if applicable) will review the proposal. Based on the viability of the proposed project, the Director (or CEO/President) will either approve or disapprove the project.	CIPR - (Project Name)	none
5	**DISAPPROVED:** If the proposal is not approved, the department Director (or CEO/President) will return the CIPR-F to the person via email (cc'ing iso@luna360.com) with an explanation of the reason for the disapproval. The CIPR-F form will then be saved as a record in the TIQMS. **APPROVED:** If the project is approved, the department Director (or CEO/President) will notify the ISO team (and cc the project initiator). The ISO team will assign the proposal a Project Number from the CIPTL Continual Improvement Project Tracking List	In-Process CIPTL CIPR - (Project Number)	In-process CIPR - (Project Number) Updated CIPTL Approval/Disapproval email

Step:	Task to be Accomplished:	Inputs Necessary to Accomplish this Task:	Outputs from This Task, Including Verifiable Documentation
	and assign a person to head the project, who will be the CI Project Manager. The CI Project Manager will then determine the additional CI Project Team Members. This information will be documented on the CIPR-F. (**Note:** At this point, the CIPR becomes an official document/record).		
6	The CI Project Manager and CI Project Team Members will meet to determine the tasks, responsibilities and time frames for the improvement project in the CIPR Continual Improvement Project Record.	In-Process CIPTL CIPR - (Project Number)	CIPR - (Project Number) Updated CIPTL
7	On a regular basis, the team will meet to review the progress of the improvement project and revise or update the CIPR Continual Improvement Project Record. CIPTL Continual Project Tracking List will be updated by the CI project manager as required.	In-process CIPR (Project Number) In-process CIPTL - (Project Number)	In-process CIPR (Project Number) Updated CIPTL
8	All documentation related to the project (studies, analysis, quotes, bids, communications, etc.) will be placed in a project folder in the Records directory when they are complete.	In-process CIPR (Project Number) Project documentation	Project folder in Everyday Docs>Level IV Documents>Records>[Year]>
9	On completion, the CI Project Manager will submit the CIPR Continual Improvement Project Report, plus all accompanying documentation to their Department Director (or CEO/President) and cc iso@luna360.com for review and approval to close.	In-process CIPR (Project Number)	In-process CIPR (Project Number) Updated CIPTL
10	The Department Director (or CEO/President) will review the project with any required project documentation. **APPROVE:** If the Department Director (or CEO/President) determines that the Continual Improvement Project has accomplished its goals, then they will sign-off in the Review section of the CIPR Continual Improvement Project Report and submit the final copy to iso@luna360.com, who will update the CIPTL Continual Project Tracking List and file all records in the TIQMS. **DISAPPROVED:** If the Department Director (or CEO/President) determines that the	In-process CIPR (Project Number)	Completed CIPR In-process CIPR (Project Number) Updated CIPTL Approval/Disapproval email

Step:	Task to be Accomplished:	Inputs Necessary to Accomplish this Task:	Outputs from This Task, Including Verifiable Documentation
	Continual Improvement Project has not accomplished its goals, then they will return the CIPR Continual Improvement Project Report to the CI Project Manager via email (cc iso@luna360.com) with an explanation of any further actions required.		
11	The results of the Continual Improvement Projects will be reported per P-MR Management Review.	Completed CIPR P-MR Management Review	Completed CIPR Updated CIPTL Per P-MR Management Review
12	**Next Process:** End	End	None

Revision History:

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08/12/2019	Release	New System Release to: • ISO 9001:2015 Quality management systems -- Requirements • ISO 17100:2015 - Translation services — Requirements for translation services • ISO 13611:2014 – Interpreting -- Guidelines for community interpreting	CEO
1/22/2020	001	Revised title line in header from "Translation & Interpretation Quality Management System: ISO 9001, ISO 17100 & ISO 13611" to "Translation Quality Management System: ISO 9001 & ISO 17100."	
1/27/2020	002	Revised header - removed 13611	

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Translation & Interpretation Quality Management System: ISO 17100 & ISO 9001

+System Element:	Title:
Process:	**P-IEC Internal and External Communications**
Responsible Lead:	***President***
Additional Responsibilities:	• ***Project Manager or Language Services Coordinator*** • ***Senior Leadership*** • ***Responsible Manager***

Process Description:

This process defines the requirements for the communications of Management System information to internal organization sources and external sources.

MS Manual - Click Here

Referenced Documents, Forms and Records – Links and Locations	
Title	**Location**
P-CA Corrective Actions	Everyday Docs>Level II Documents>
P-DC Documentation Control	Everyday Docs>Level II Documents>
P-IEAA Internal and External Audits and Assessments	Everyday Docs>Level II Documents>
RM Records Matrix	Everyday Docs>Level IV Documents>Records>[Year]>RM>
Legal and Other Requirements Matrix	Everyday Docs>Level IV Documents>

Process:

Step:	Task to be Accomplished:	Inputs Necessary to Accomplish this Task:	Outputs from This Task, Including Verifiable Documentation
Internal Communications			
1	Required internal communications (notifications, etc.) are defined within each process of the Management System (MS).	Communication requirements of each MS process	None
2	Email will be the primary mode of formal communications within the organization (where emails are needed to provide proof of communications). **Note:** The email server is secured to guard against attacks and/or hacking. Only the approved email server may be used for communications.	Approved email server	Emails on server

Step:	Task to be Accomplished:	Inputs Necessary to Accomplish this Task:	Outputs from This Task, Including Verifiable Documentation
3	Emails will be retained as documented on the Records Matrix and per the Documentation Control process.	RM Records Matrix P-DC Documentation Control	Per P-DC Documentation Control
External Communications - Customers			
4	Normal communications with customers regarding a project are handled by the assigned Project Manager or Coordinator.	Client specific project folder (when appropriate) Customer requirements	Emails to and from customers Client specific project folder
5	Data transfers with customers, when required, will be accomplished using a secure data transfer service that has been vetted to ensure that their security protocols are adequate to protect the data being transferred.	FTP data transfer service, encrypted e-mail, secure online portal, or other secure electronic services as needed	Notifications from FTP data transfer service
6	**Non-Typical Communications:** When a customer requests information that is outside the scope of the project, the Project Manager or Coordinator will forward the request to the CEO, President, or the Head of Operations. The designated person will make the determination as to what and to what extent the information will be released to the customer.	Request for information from customer	Documentation approved to be released by the Senior Project Manager or Coordinator Client specific project folder
7	Any documentation provided to the customer will be recorded in Project Tracker and handled in accordance with Documentation Control.	Documentation provided to customer P-DC Documentation Control	Client specific project folder
External Communications – Interested Parties			
8	**Legal Entity Request:** When a legal entity requests information, over and above the required reporting called out in the Legal and Other Requirements Matrix, the request will be forwarded to the CEO or President, depending on the nature of the request. The CEO or President will seek the advice of legal counsel, when necessary, and will make the determination as to the type and extent of the information to be provided.	Request for information from legal entity Legal and Other Requirements Matrix	Documentation approved to be released by the CEO and/or legal counsel
9	**Certification Body Requests:** Typically, the auditor of the certification body will review documentation in the course of their audit to determine conformance. The President or Head of Operations will make every effort to provide the auditor with the documentation and/or	P-IEAA Internal and External Audits and Assessments	Certification body audit report

For Reference Only

Step:	Task to be Accomplished:	Inputs Necessary to Accomplish this Task:	Outputs from This Task, Including Verifiable Documentation
	information in accordance with Internal and External Audits and Assessments. Certification body auditors **may not** retain or remove company documentation or copies of documentation unless approved by the President.		
10	**Other Interested Party Requests:** When an outside interested party requests information, the request will be forward to the President or Head of Operations, depending on the nature of the request. The President or Head of Operations, and if necessary, legal counsel, will make the determination as to the type and extent of the information to be provided.	Request for information from interested party	Documentation approved to be released by the CEO and/or legal counsel
11	Any documentation provided to any interested party will be handled in accordance with Documentation Control.	Documentation provided to customer P-DC Documentation Control	As appropriate to the request
External Communications – Suppliers and Resources			
12	E-mail communications with suppliers will be accomplished by the Head of Operations and documented in the e-mail archive. E-mail communication with resources (desktop publishers, translators, editors, interpreters, etc.) will be accomplished by the Department Directors, Responsible Managers, Project Managers, or Language Services Coordinators and documented in the e-mail archive or e-mail audit logs.	Customer requirements ASUP Approved Supplier List in accounting program	ASUP in accounting program Electronic record in archive or audit log.
13	Documentation provided to any supplier and/or resource will be handled in accordance with Documentation Control.	Documentation provided to suppliers and/or resources P-DC Documentation Control Request from outside entity for documentation	Everyday Docs>Level IV Documents>Records>[Year]>Requests
14	**Next Process:** P-IEAA Internal and External Audits and Assessments	P-IEAA Internal and External Audits and Assessments	None

For Reference Only

Revision History:

Revision Date	Rev. #	Revision Description/Details	Approved by:
08/12/2019	Release	New System Release to: • ISO 9001:2015 Quality management systems -- Requirements • ISO 17100:2015 - Translation services — Requirements for translation services • ISO 13611:2014 – Interpreting -- Guidelines for community interpreting	CEO
9/20/2019	001	Page 2, step 4, under "Inputs" column, added the words "(when appropriate)"	KMW
9/20/19	002	Page 2, step 5, under "Inputs" column, added the words "encrypted e-mail, secure online portal, or other secure electronic services as needed"	KMW
1/22/2020	003	Revised title line in header from "Translation & Interpretation Quality Management System: ISO 9001, ISO 17100 & ISO 13611" to "Translation Quality Management System: ISO 9001 & ISO 17100."	
1/27/2020	004	Revised header - removed 13611	

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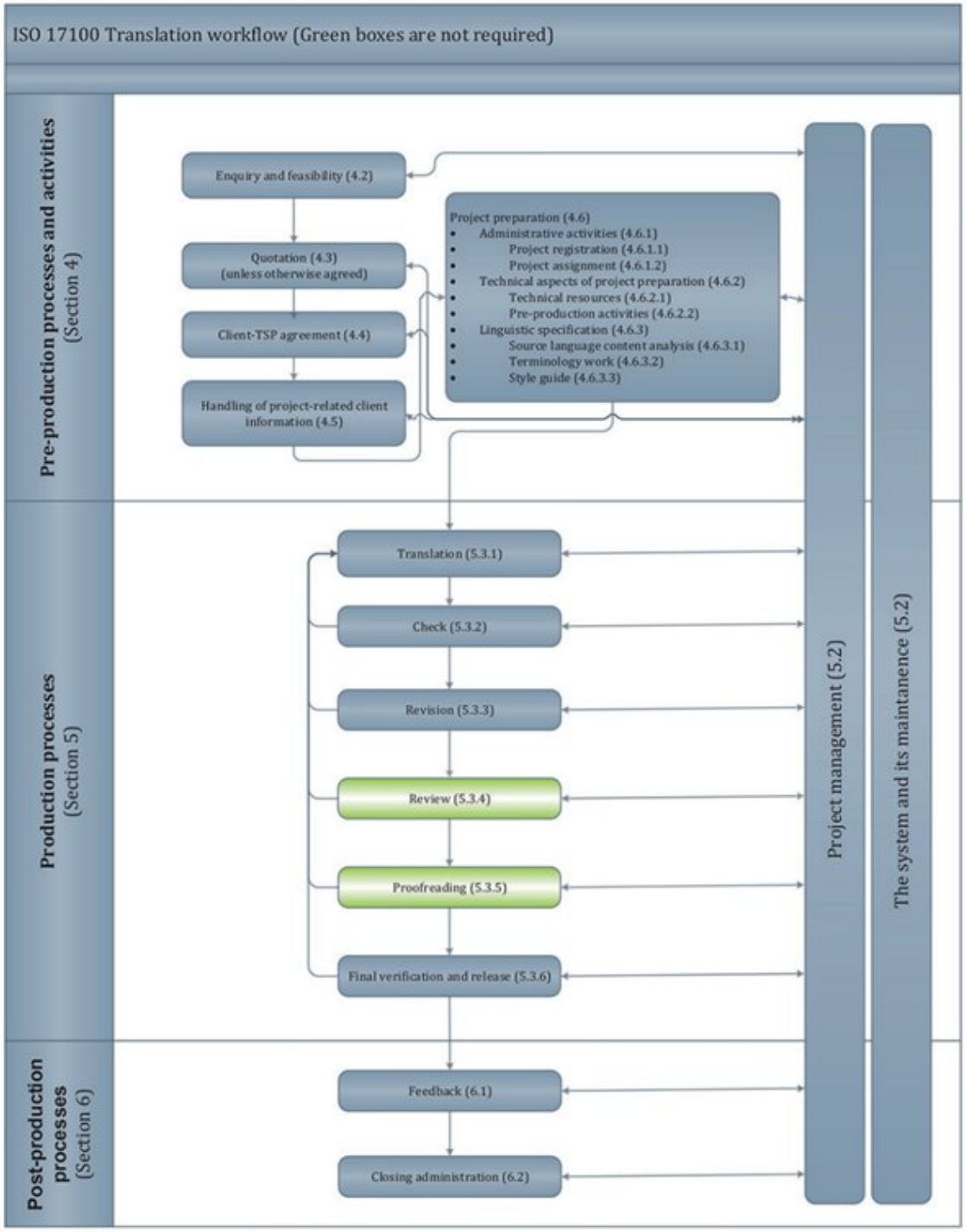
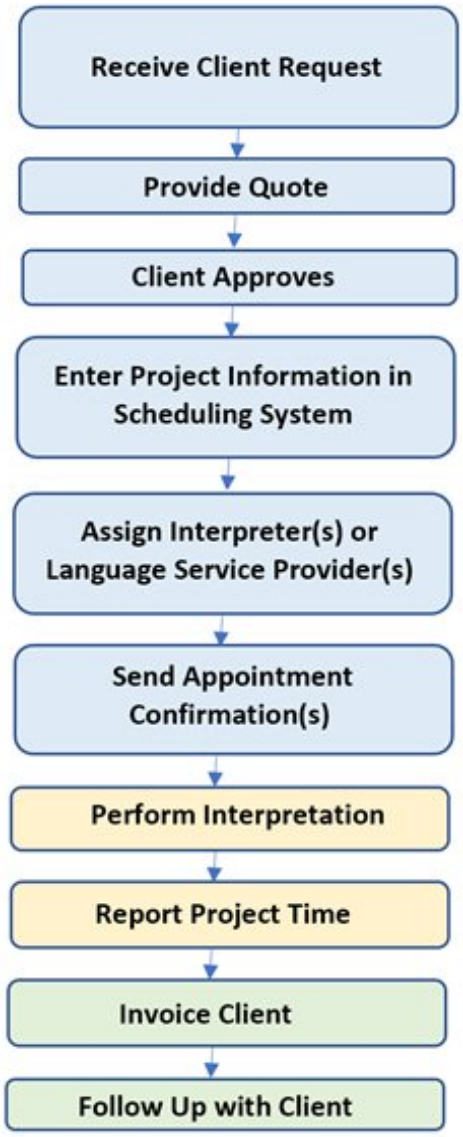


Interpretation Work Flow



Manual - General:

This Quality Manual, Processes, and the associated instructions, forms and records define the entirety of the Management System (MS).

PDCA Cycle:

Plan: Establish the service objectives of the Management System, and the resources needed to deliver results in accordance with industry and customers' requirements and the organization's policies, and to identify and address risks and opportunities;

Do: Implement what has been planned;

Check: Monitor and (where applicable) measure processes and the resulting products and services against policies, objectives, requirements and planned activities, and report the results;

Act: Take actions to improve performance, as necessary.

LUNA's Email Security Measures

LUNA utilizes Microsoft Exchange Online for e-mail transmission and storage.

The following table provides an overview of the security and compliance features available in Exchange Online and includes links to topics that helps users learn about and manage these features.

This content in this table was created by Microsoft and can be accessed directly at this url:

https://docs.microsoft.com/en-us/exchange/security-and-compliance/security-and-compliance#:~:text=In%20Exchange%20Online%2C%20you%20can,to%20archive%20and%20delete%20email.&text=As%20an%20administrator%2C%20you%20can,Exchange%20Server%20or%20Exchange%20Online.

SECURITY AND COMPLIANCE IN EXCHANGE ONLINE

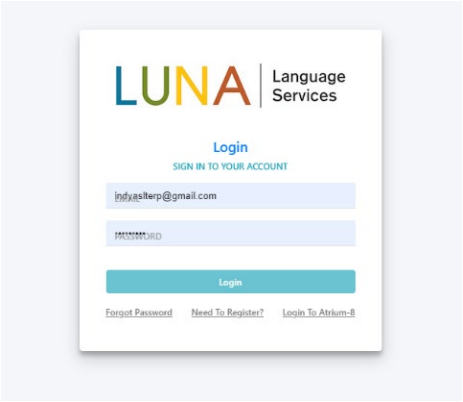
Feature	Description
Archive mailboxes in Exchange Online	Archive mailboxes (called In-Place Archiving) let people in your Microsoft 365 or Office 365 organization take control of messaging data by providing additional email storage. People can use Outlook or Outlook on the web (formerly known as Outlook Web App) to view messages in their archive mailbox and move or copy messages between their primary and archive mailboxes.
In-Place Hold and Litigation Hold	In-Place Hold and Litigation Hold allow you to preserve or archive mailbox content for compliance and eDiscovery.
In-Place eDiscovery	In-Place eDiscovery allows authorized compliance officers in your organization to search mailbox data across your Exchange organization, preview search results, copy them to a Discovery mailbox or export them to a .pst file.
Inactive mailboxes in Exchange Online	You can preserve the contents of deleted mailboxes indefinitely by using inactive mailboxes. You can make an inactive mailbox by placing an In-Place Hold or a Litigation Hold on the mailbox, and then deleting the corresponding user account. In addition to preserving mailbox contents, administrators or compliance officers can use In-Place eDiscovery in Exchange Online or Content Search in the Microsoft 365 compliance centers to search the contents of an inactive mailbox.
Data loss prevention (DLP)	Data loss prevention (DLP) helps you identify and monitor sensitive information, such as private identification numbers, credit card numbers, or standard forms used in your organization. You can set up DLP policies to notify users that they are sending sensitive information or block the transmission of sensitive information.
Exchange auditing reports	You can use the auditing functionality in Exchange Online to track changes made to your Exchange Online configuration by Microsoft and by your organization's administrators, and to audit mailbox access by persons other than the mailbox owner. In Exchange Online, audited actions are recorded and available to view in an online report or export to a file.

SECURITY AND COMPLIANCE IN EXCHANGE ONLINE

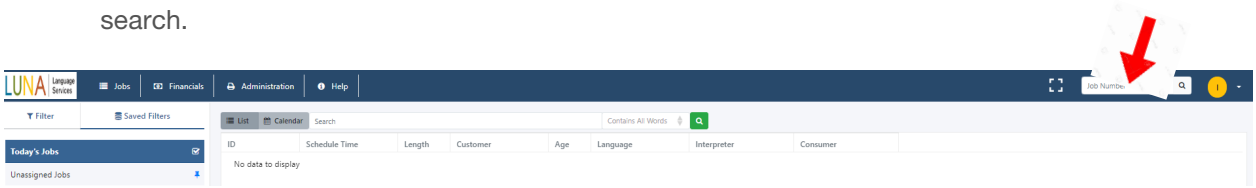
Feature	Description
Messaging records management (MRM)	Messaging records management (MRM) helps your organization manage email lifecycle to meet business and regulatory requirements and reduce the legal risks associated with email. In Exchange Online, you can use In-Place Hold or Litigation Hold to preserve email and Retention tags and retention policies to archive and delete email.
Information Rights Management in Exchange Online	Information Rights Management (IRM) helps you and your users control who can access, forward, print, or copy sensitive data within an email. IRM can use your on-premises Active Directory Rights Management Services (AD RMS) server.
Message Encryption FAQ	Message Encryption allows you to send encrypted messages to people inside or outside your organization, regardless of the destination email service, whether it's Outlook.com, Yahoo, Gmail, or another service. Designated recipients can send encrypted replies. Message Encryption combines email encryption and rights management capabilities. Rights management capabilities are powered by Azure Information Protection.
S/MIME for Message Signing and Encryption	Secure/Multipurpose Internet Mail Extensions (S/MIME) allows email users to help protect sensitive information by sending signed and encrypted email within their organization. As an administrator, you can enable S/MIME-based security for your organization if you have mailboxes in either Exchange Server or Exchange Online.
Journaling in Exchange Online	Journaling can help you meet legal, regulatory, and organizational compliance requirements by recording inbound and outbound email communications. In Exchange Online, you can create journal rules to deliver journal reports to your on-premises mailbox or archiving system, or to an external archiving service.
Mail flow rules (transport rules) in Exchange Online	You can use mail flow rules (also known as transport rules) to inspect messages sent or received by your users and take actions such as blocking or bouncing a message, holding it for review by a manager or an administrator or delivering a copy to another recipient if the me

Atrium Client Portal - Instructions

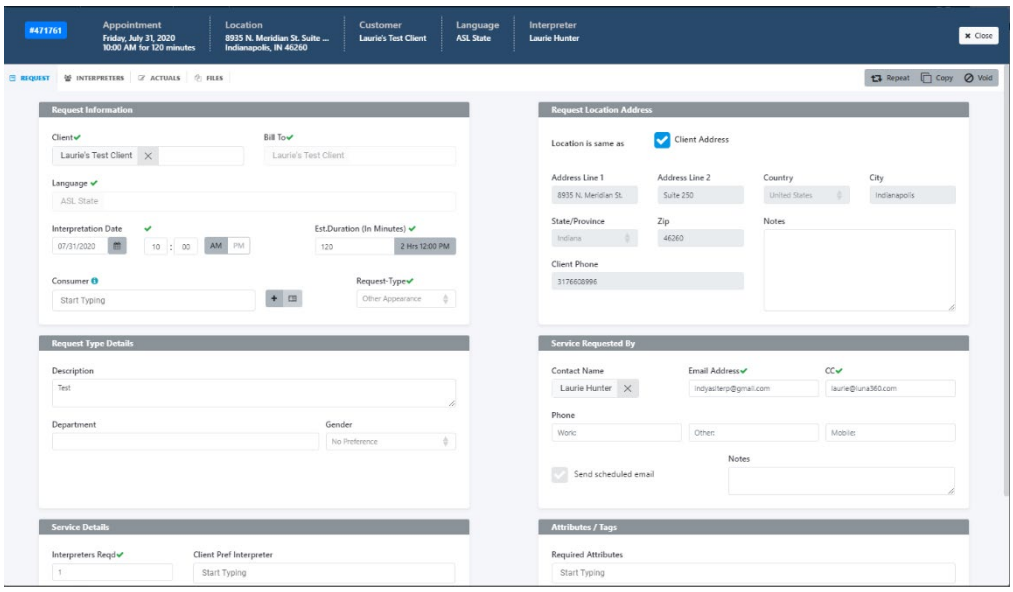
1. Log into LUNA's portal at **goluna360.com**.



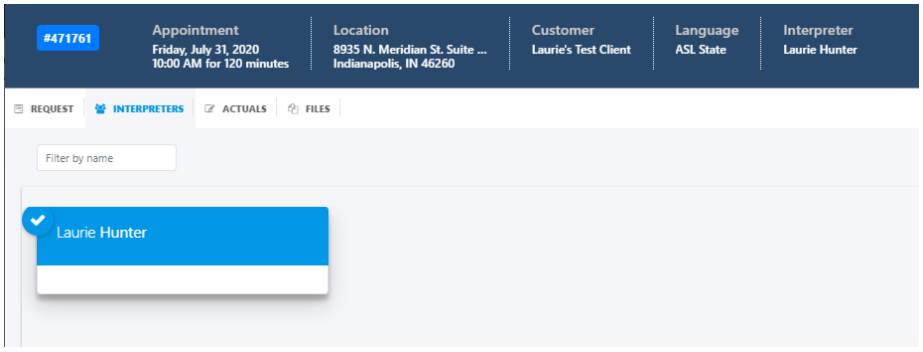
2. Type in the job number in the field on the right side at the top of your screen and press enter to search.



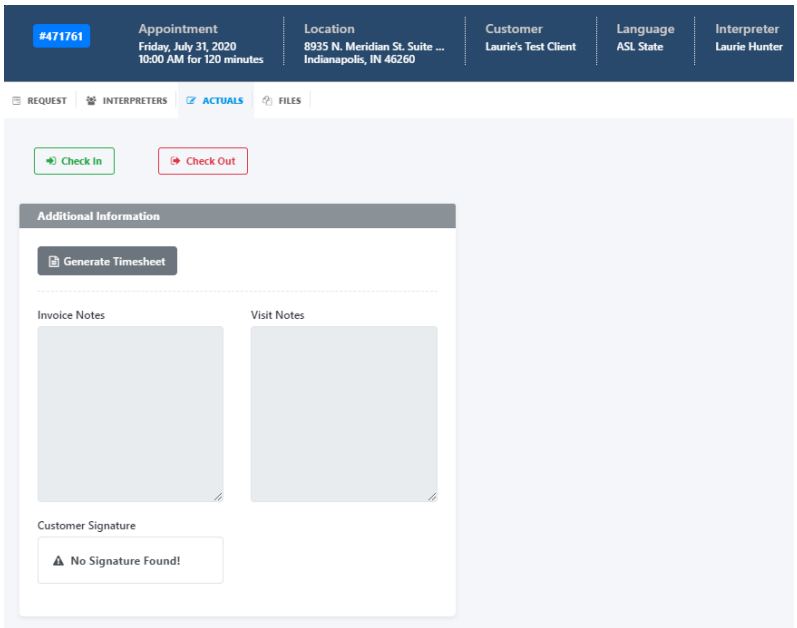
3. A screen showing all the appointment information will open.



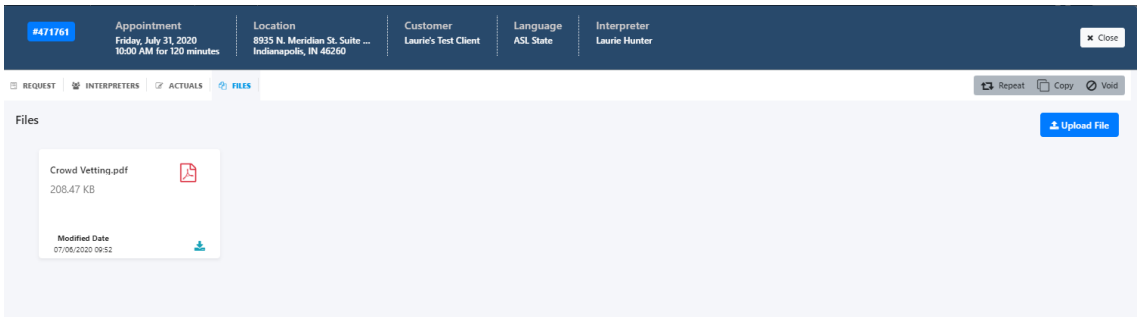
4. Beneath the bold, blue heading at the top of the screen, you will see four tabs: Request, Interpreters, Actuals and Files. Click on the **Interpreters** tab to see the name(s) of the interpreter(s) assigned.



5. Click on the **Actuals** tab to see the interpreter's Check In/Check Out times, Visit Notes added by the interpreter, Invoice Notes added by our staff/Accounting personnel, and a Customer's Signature (if applicable).



6. Click on the **Files** tab to upload any files or documents to be shared with the interpreter(s) for that request.



7. In the portal, you will also be able to add new requests, view requests already entered, view invoices and add and maintain users.

Atrium Benefits

Using Atrium, LUNA's scheduling platform, the State of Indiana will receive electronic confirmation of the request as well as electronic confirmation of the name of the interpreter. Other information and notes can be customized to be included by request.

Additional key attributes of the Atrium coordinating platform include:

- Instant web-based communication between all interested parties, including LUNA, the interpreters, subcontracting agencies, and other State of Indiana designees.
- A database that is designed to accurately record all end users' preferences for communication assistant (including "banned" interpreters), language needs, assignment details, and interpreter profile details;
- Quick links to maps, specific direction, and exact mileage estimates within the details of each assignment;
- Automated invoicing capabilities tied to the interpreter and assignment allowing for real time, accurate, timely, and convenient invoicing immediately after appointment is complete;
- Safeguards against error in data entry and invoicing discrepancies by reducing multiple repetition of data entry;
- Time savings for interpreters who no longer need to prepare an invoice for every assignment;
- Ability to prioritize specific interpreters with end users; and
- Rapid dissemination of assignment to subcontracting agencies, some also using the same coordinating software.

If the State would like to take advantage of our Client Portal feature, requesters can access that information themselves using a designated username and password. Also available in the client portal are historical requests, financial information, and a snapshot of our comprehensive service provision at your fingertips.

LUNA offers customized reporting and invoices that include the type of information specific to the State's needs. Any of the identifying information you would need can be easily accessible to the employees and departments who need it. Information required for reports can be directly linked to the assignment and available immediately after the assignment is finished and the interpreter enters the time and date "stamp" (available from any device with online capabilities or through a smart-phone application).

If interpreting services are provided without a specific Purchase Order, our Accounting team can use the department name as a point of reference for The State of Indiana or create a "parent account' where all of these requests can be gathered. Notably, our coordinators can prompt State requestors for specific mandatory request information as instructed by the scope of work within the contract. We know that every client's accounting protocol and needs

are different and we, therefore, remain flexible with our invoicing processes.

LUNA has worked diligently with Atrium's software developers, subcontracted data analysts and consultants in order to provide quality assurance safeguards for data captured in Atrium. This data is funneled into reports for various audiences to reflect our goals and outcomes.

We currently utilize the following operational reports for quality assurance and to ensure that we are responsibly maximizing our resources: Key Performance Indicators measuring job fill rate, scheduling accuracy, cancellations, no shows, feedback, request volume per language, and timeliness of language service provision.

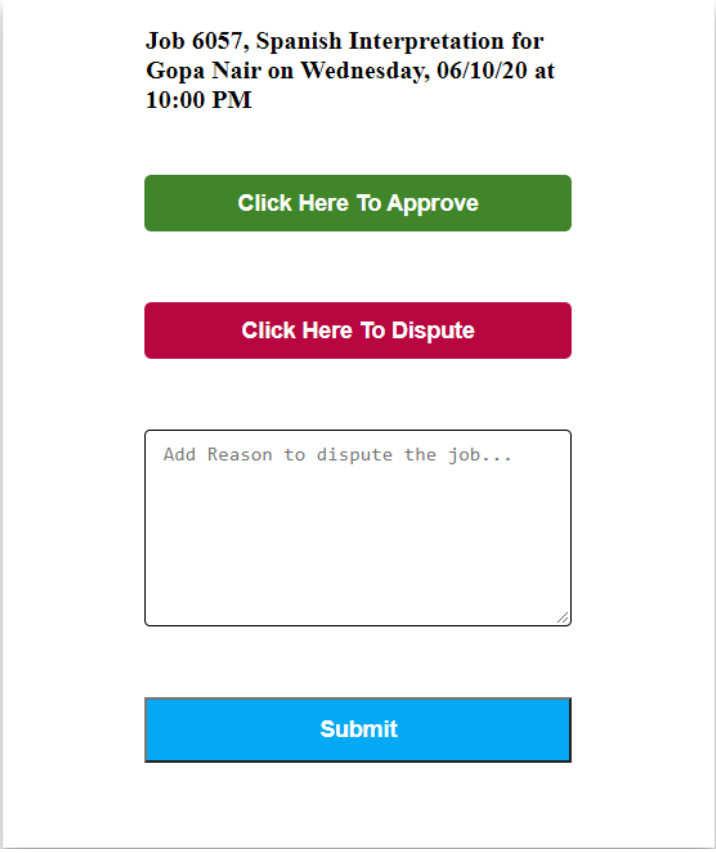
Atrium E-Receipt Example

The screenshot below shows what clients receive when they opt-in to receive an e-mailed eReceipt for all language appointments.

When the interpreter submits their digital timesheet at the end of an appointment, an eReceipt is automatically generated via e-mail and is sent to the client contact who originally requested services.

The client is given an opportunity to approve the submitted arrival and departure times or to dispute them.

There is an additional timesaving option available which allows the client to accept the timesheet by default and only reply if they wish to dispute the submitted times. This allows for greater accuracy in the invoicing process and gives clients immediate information about the completion of scheduled appointments.



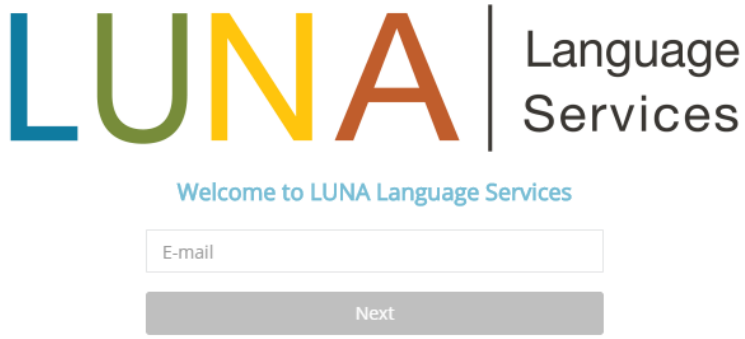
Boostlingo (VRI) Client Portal

This document gives a basic overview of the Account Management functions inside of Boostlingo, LUNA's VRI scheduling platform. The information in this document is in the format of client instructions and shows how to view the client dashboard, call log, scheduled appointments, and invoices.

This document is referenced in section 2.6.6 of LUNA's Technical Proposal.

Instructions – Client Perspective in Interpret Manager

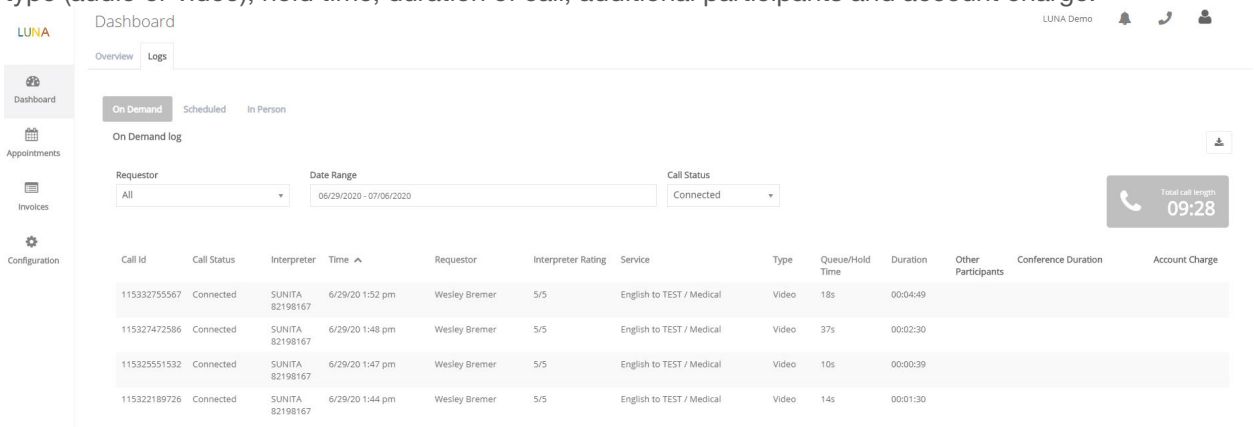
1. Log into LUNA's portal at **luna.interpretmanager.com** with secure password.



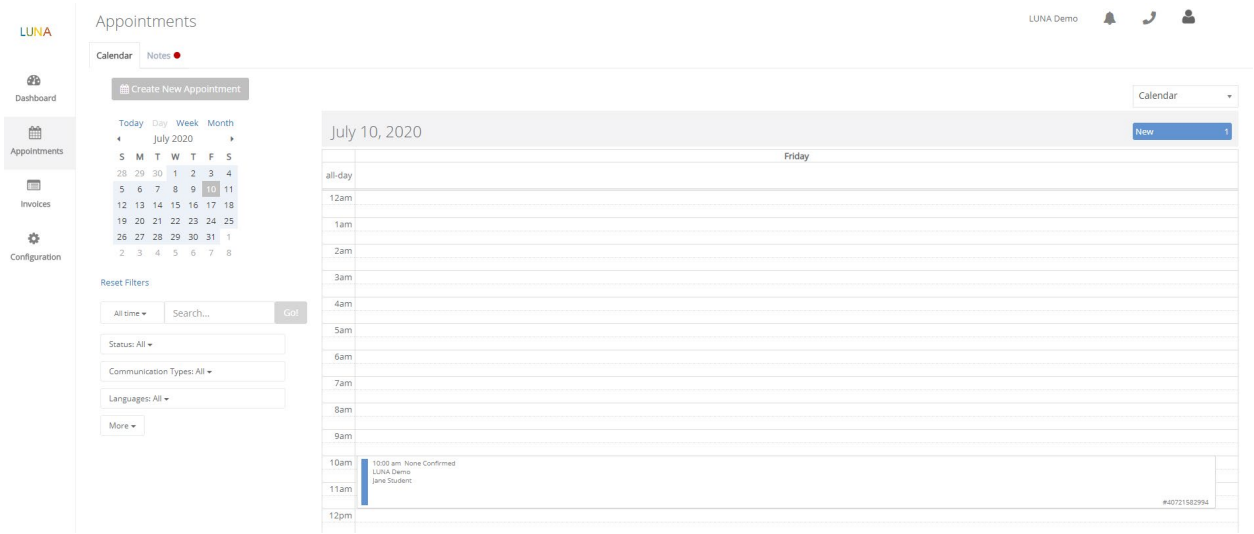
2. Your portal will open to the Dashboard page. Here, you can view pre-scheduled appointments as well as data graphs regarding VRI usage.

3. From the Dashboard, click on the **Logs** tab to see details of all Pre-Scheduled and On Demand VRI requests. These can be sorted by Requester, Date Range, and Call Status (Calls that were successfully connected to an interpreter, calls that were abandoned by the requester before a connection was made, or calls that were rolled over to connect with a phone interpreter).

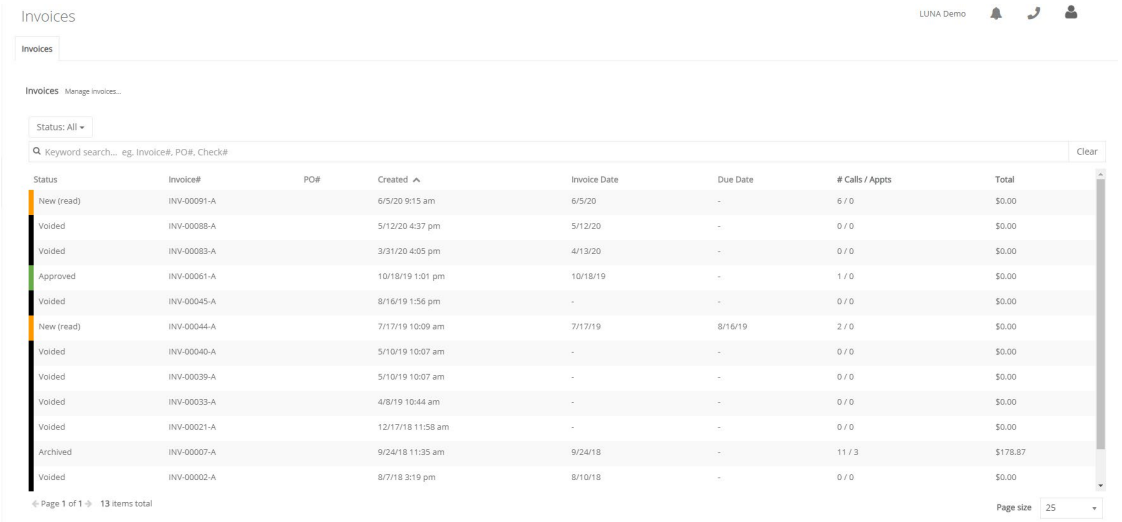
*Notice, the information provided in the log includes the call ID, call status, interpreter name and ID, time of the call, name of requester, interpreter rating, service type (language pair and category of service), call type (audio or video), hold time, duration of call, additional participants and account charge.



4. On the left side of your screen, you will see three additional tabs: Appointments, Invoices and Configuration. Click on the **Appointments** tab to create new, pre-scheduled requests and search/view requests already entered into the portal.

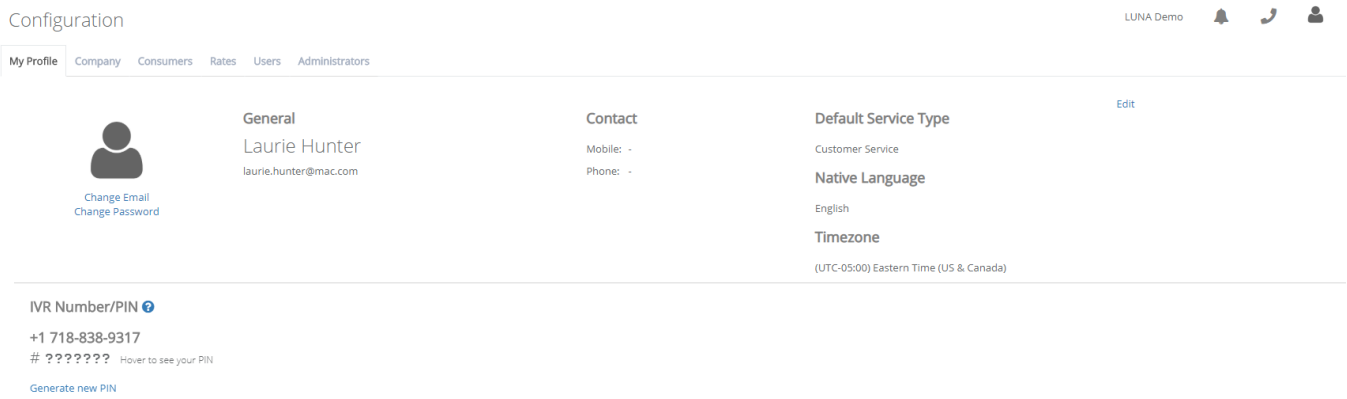


5. Click on the **Invoices** tab to see the status of and access current and past invoices.



Status	Invoice#	PO#	Created	Invoice Date	Due Date	# Calls / Appts	Total
New (read)	INV-00091-A		6/5/20 9:15 am	6/5/20	-	6 / 0	$0.00
Voided	INV-00088-A		5/12/20 4:37 pm	5/12/20	-	0 / 0	$0.00
Voided	INV-00083-A		3/31/20 4:05 pm	4/13/20	-	0 / 0	$0.00
Approved	INV-00061-A		10/18/19 1:01 pm	10/18/19	-	1 / 0	$0.00
Voided	INV-00045-A		8/16/19 1:56 pm	-	-	0 / 0	$0.00
New (read)	INV-00044-A		7/17/19 10:09 am	7/17/19	8/16/19	2 / 0	$0.00
Voided	INV-00040-A		5/10/19 10:07 am	-	-	0 / 0	$0.00
Voided	INV-00039-A		5/10/19 10:07 am	-	-	0 / 0	$0.00
Voided	INV-00033-A		4/8/19 10:44 am	-	-	0 / 0	$0.00
Voided	INV-00021-A		12/17/18 11:58 am	-	-	0 / 0	$0.00
Archived	INV-00007-A		9/24/18 11:35 am	9/24/18	-	11 / 3	$178.87
Voided	INV-00002-A		8/7/18 3:19 pm	8/10/18	-	0 / 0	$0.00

6. Click on the **Configuration** tab to view and manage your profile, company settings, consumer(s) information, call rates, connected users (requesters) and administrators of the account.



Plunet

Plunet BusinessManager 7.4

Plunet customer portal: User guide

AUTHOR

Plunet GmbH

Plunet

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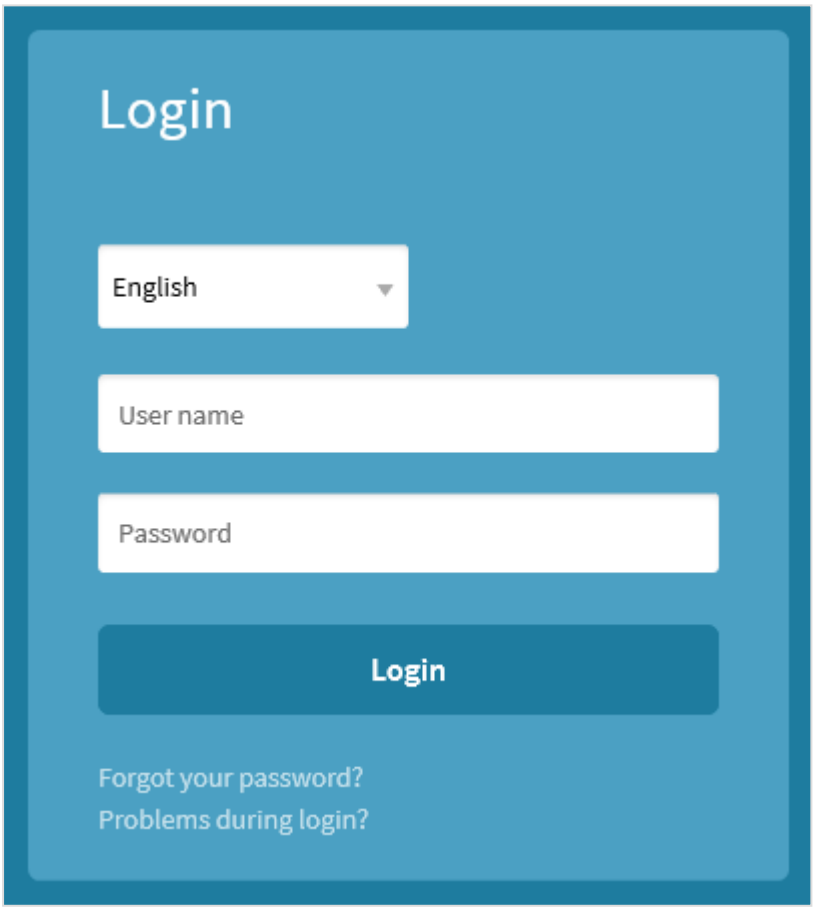
Introduction

This guide is aimed at all users who work with the Plunet BusinessManager customer portal. You can use Plunet BusinessManager to request projects, view the status of your quotes and orders, download delivered documents and give job feedback.

Login

Enter the URL of Plunet BusinessManager in the address bar of your Internet browser. Log into the system with your user name and password. Please make sure to disable your browser's pop-up blocker.



NOTE

If you enter the wrong password three times in a row, your account will be automatically

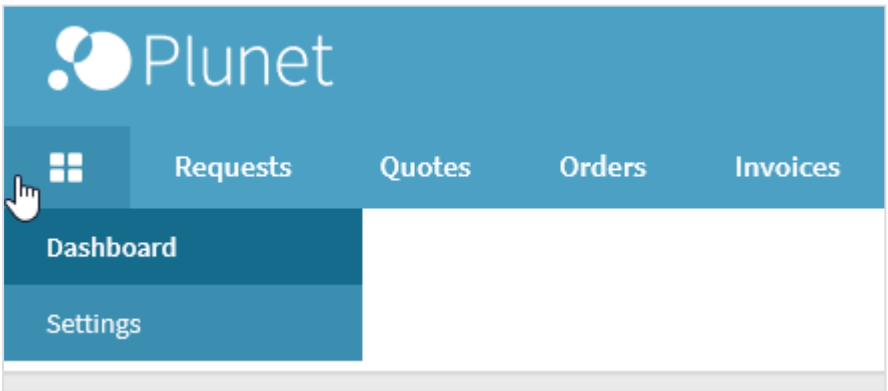
locked for 24 hours. To unlock your account sooner, please contact your administrator. If you have forgotten your password, you can click on *Forgot your password?* and a new password will be sent to you by e-mail. If you have problems logging into *Plunet BusinessManager*, please click on *Problems during login?* and fill in the form to send a message to the system administrator.

Navigation

The navigation in Plunet BusinessManager is divided into the following levels:

- Tabs
- Menus
- Sub-menus

The number of tabs and menus that you can access depends on your rights and the modules that have been enabled for you. Click on a tab to access additional menu items at the menu level. These items then lead to additional menu items at the sub-menu level. When you click on a menu item at the sub-menu level, the view automatically jumps down to the corresponding section.



Action bar

Info

When you click on in the top right-hand corner, the *Info* window opens. Here you can find useful documents and links.

User

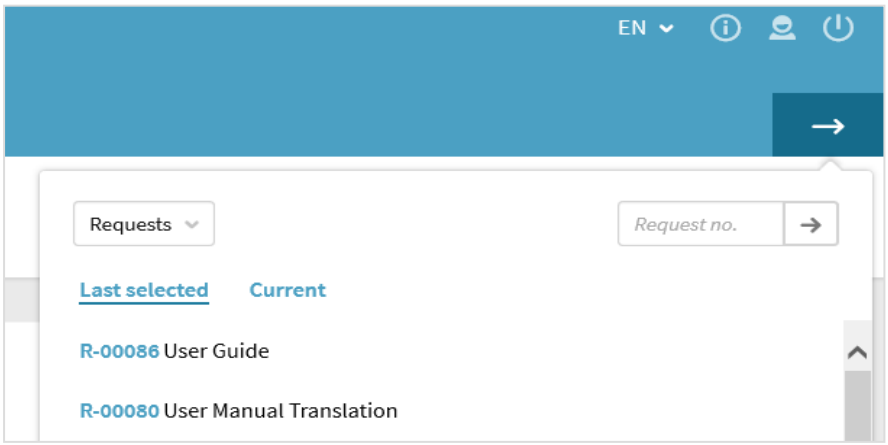
Clicking on opens the *User* window, where you can find information on the currently logged in user, as well as the option of making user-specific settings.

Logout

Click on to log out of Plunet BusinessManager.

Switch button

The "Switch" button can be found at the far right of the title row. It is always visible at the top right, even when you scroll down the page. Clicking on opens a window, where you can quickly jump to other data records and projects, e.g. in order to view an older request as a reference for a new request. The window initially provides you with the option of switching to another data record in the same area. You can switch to a different area by selecting the relevant value from the drop-down list.



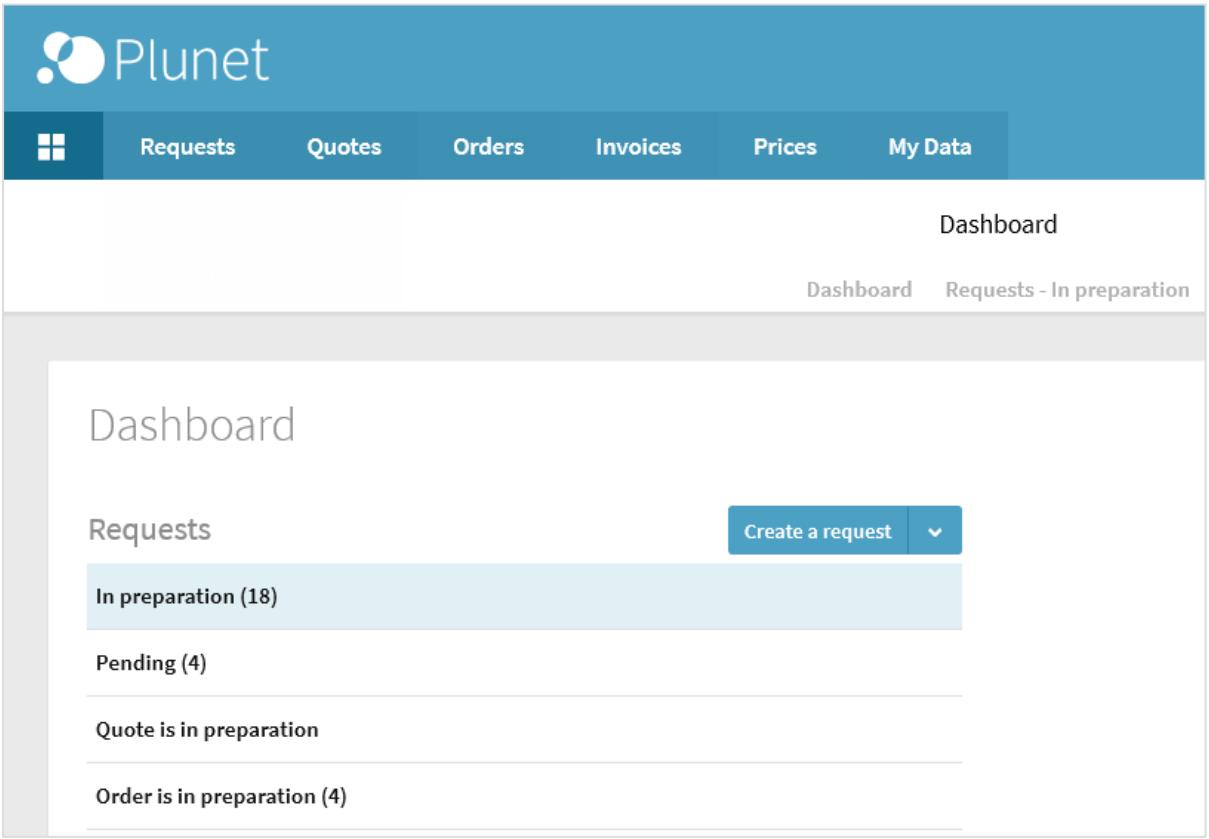
You can jump directly to a specific data record by entering the request, quote, job, order or invoice number. The *Last selected* and *Current* lists are displayed underneath. *Last selected* shows you the data records that you have most recently viewed, while *Current* shows you the projects that still need to be worked on, sorted by project number.

Main menu

If you have the appropriate rights, you will have access to the following tabs: *Requests*, *Quotes*, *Orders*, *Prices* and *My Data*. These tabs will be described in more details below.

Dashboard

After logging in, you reach the *Dashboard*. This page contains an overview of your requests, quotes, orders and invoices. By clicking on a status (e.g. *In preparation* or *In Progress*), you open a detailed list of all elements with that status.



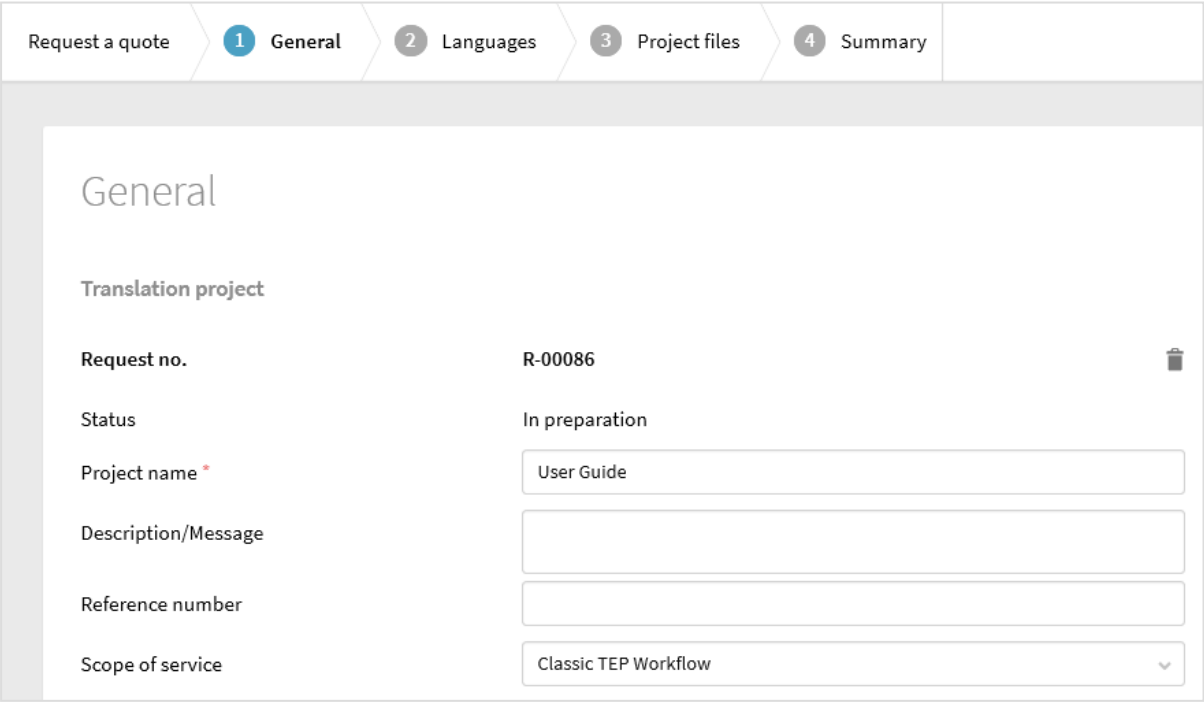
The *Dashboard* can also be reached via the *Home* menu. This menu also contains the *Settings* page, where you can find various options for customizing Plunet BusinessManager to fit your requirements. For example, you can change your password, set your time zone or select your preferred date format.

Requests

In order to create a request, click *Create a request* on the *Dashboard*. You can decide whether you want to *Request a quote* or *Place order*. In the example below, we will request a quote. The steps involved in creating a request are visible at the top of the page, which means that you can always keep track of your progress. The current step is highlighted in bold. Completed steps are marked with a tick, but you can still access them again for further editing. At the bottom of each page, you have the option of going to the next step or returning to the previous step. Any changes you have made will be automatically saved in the process.

Step 1: General

Enter basic information on the project, such as the project name, the scope of service (in this case Translation, Editing and Proofreading) and the delivery date.

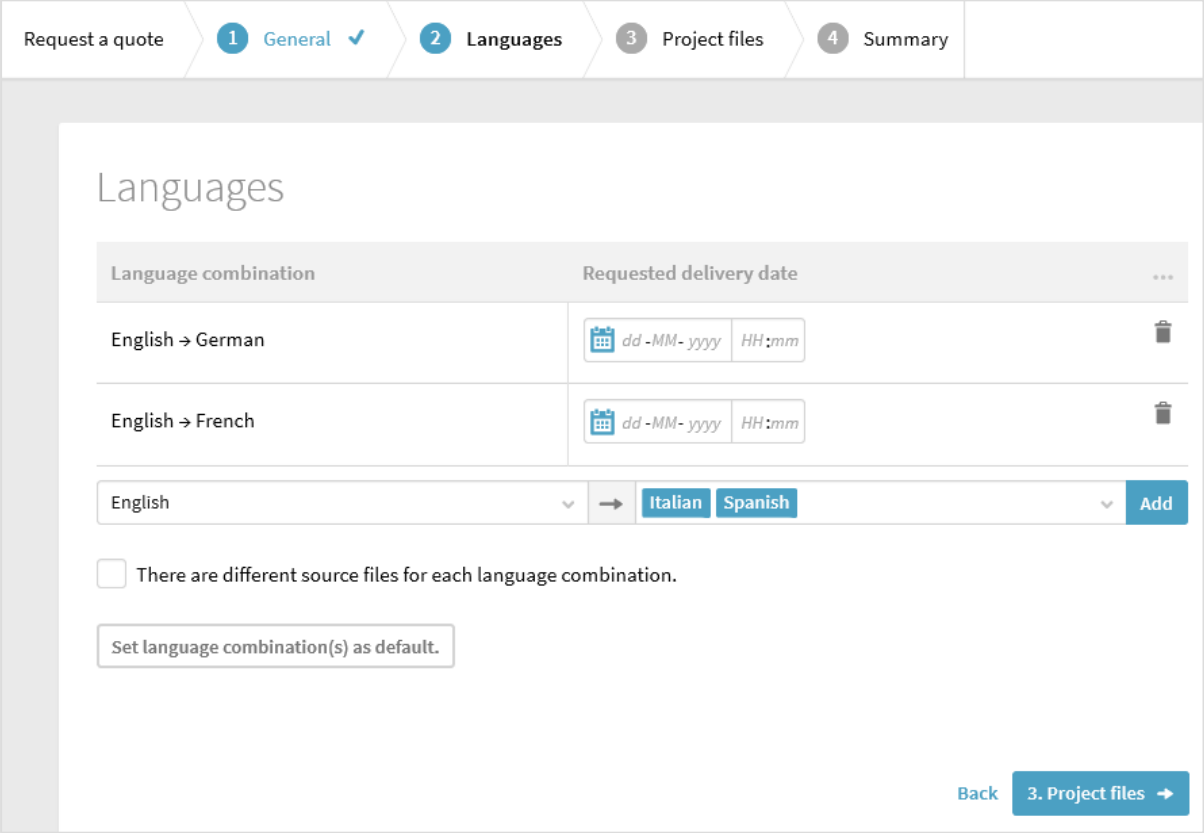


Step 2: Languages

Select the source and target languages and click on the plus button. If applicable, specify alternate delivery dates for different languages. These language combinations can also be saved as a default for future requests.

You can also specify if there are different source files for each language combination by selecting the corresponding checkbox.

If activated in your system, you can also select properties for each language combination.



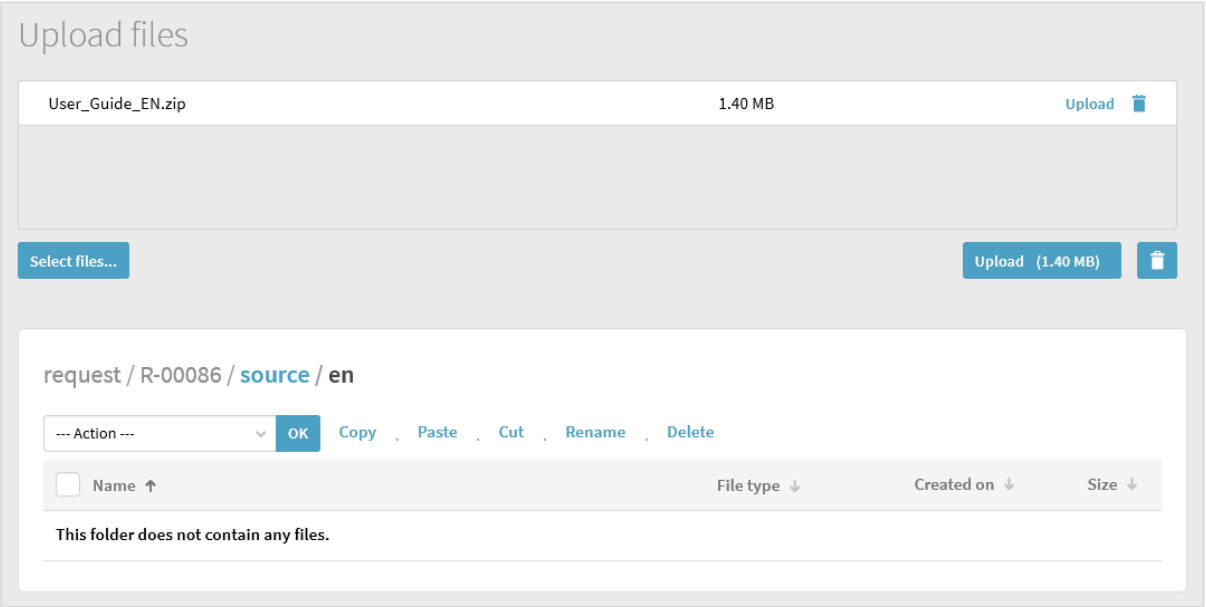
NOTE

At least one language combination must be selected before the request can be created.

Step 3: Project files

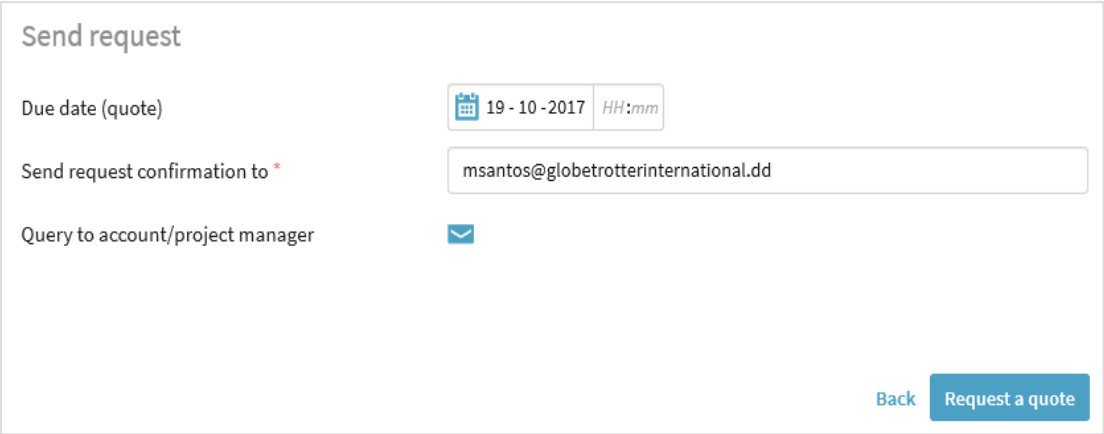
Upload the source documents and any additional reference materials via FileManager. You can also upload the files with Drag & Drop by selecting the files in your file explorer and dragging them into FileManager.

If there are different source files for each language combination, then a separate sub-folder will be created for each language combination in the *Source* directory. When a quote or order is created from the request, the documents will be copied or moved to the corresponding item folder. When all files have been uploaded, close the window.



Step 4: Summary

Now you can check the information you have entered. The information is initially displayed in "Read-only" mode. If you hover over one of the sections with the cursor, the *Edit* button appears, which you can click on to edit the information once more. Changes can then either be saved or discarded by clicking on *Save* or *Cancel*.

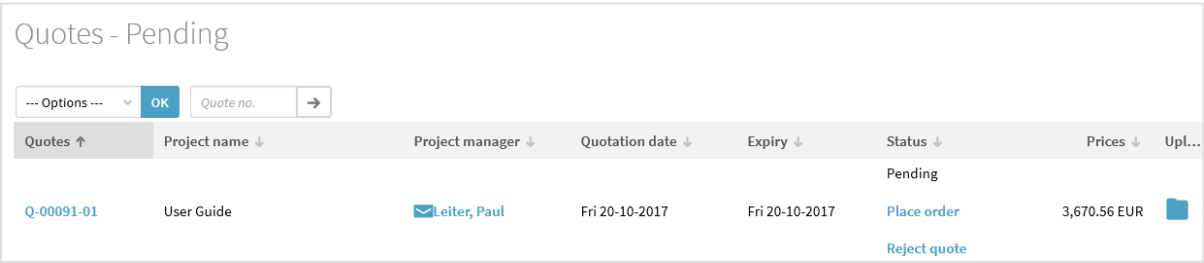


To complete the request, enter your e-mail address under *Send request confirmation to*. The options displayed here vary depending on whether you want to request a quote or place an order. If you want to request a quote, enter a due date for the quote. Click on *Request a quote* to send your request to the project manager or account manager, who will then send you a confirmation by e-mail. If you want to place an order, click on *Place order* and the project manager or account manager will send you a confirmation by e-mail.

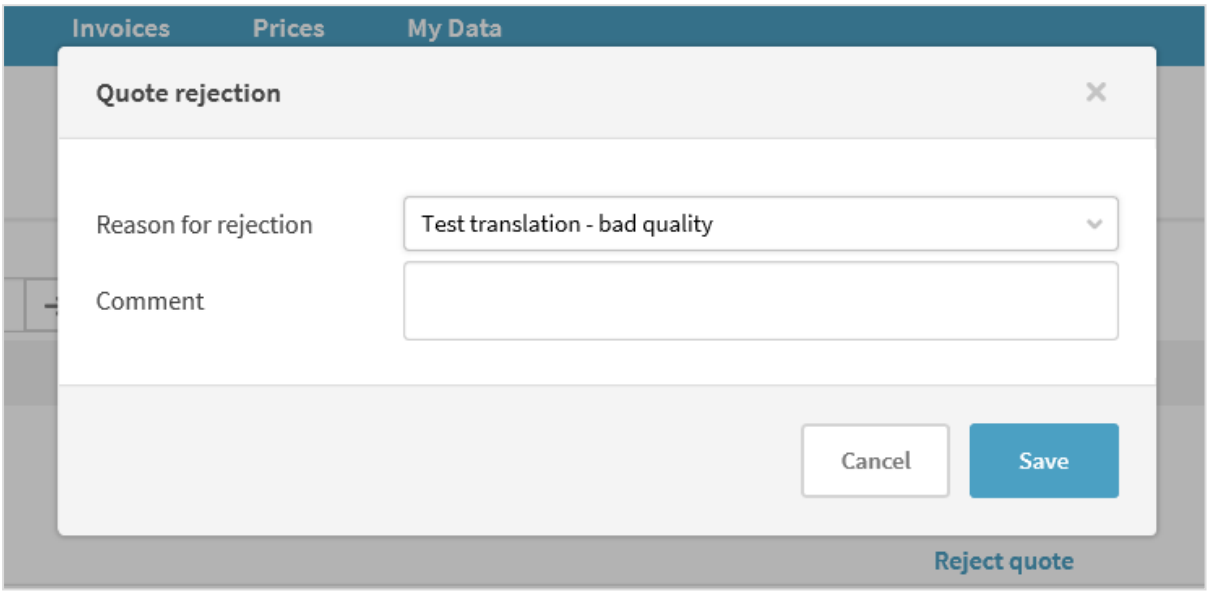
Quotes

When your request has been turned into a quote, you will be sent the quote by e-mail. You can accept or reject the quote by replying to the e-mail or via the *Dashboard*. The quote appears in the *Quotes* section on the *Dashboard* with the status *Pending*. You can directly accept the quote by clicking on *Place order* or reject it via *Reject quote*.

You can also click on the quote number in order to view the details before accepting/rejecting it.



If you click *Reject quote*, an overlay opens where you can select the reason for rejecting the quote and an optional comment. Depending on the reason for rejection, you may receive a new version of the quote.



Status report - Quotes

You can browse all of your quotes under *Quotes → Status report - Quotes*. You can use multiple search functions and filters, including time period, project type, source language and target language. Click on *Update search* to start the search and the results will appear in the *Results* section below. Click on the quote number to switch to the detailed view of that quote.

Orders

Once an order has been created, you will receive a confirmation by e-mail. When all of the jobs in the order have been completed and the files delivered, you will be sent a delivery note. You can download the delivered files directly via FileManager under *Dashboard → Orders → Delivered documents*.

Status report - Orders

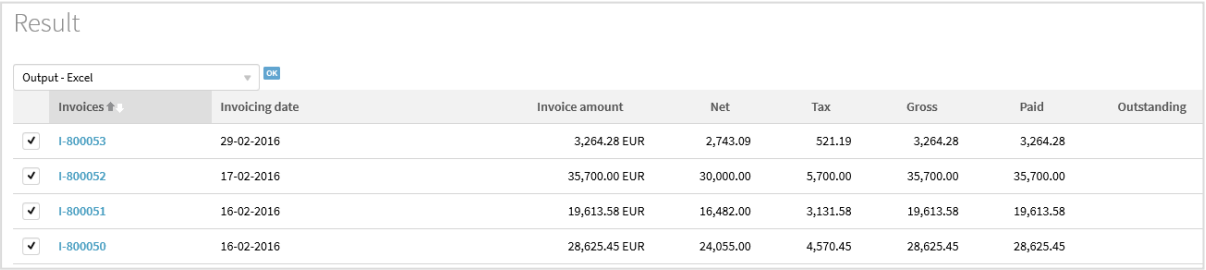
You can browse all of your orders under *Orders → Status Report - Orders*. You can use multiple search functions and filters, including time period, project type, source language and target language. Click on *Update search* to start the search and the results will appear in the *Results* section below. Click on the order number to switch to the detailed view of that order.

Feedback

If the corresponding right has been enabled for you, you can give feedback on your completed orders. You will receive an e-mail from the project manager asking you to submit feedback. This e-mail includes a link, which you can use to directly log into the order and enter your feedback.

Invoices

When the project manager sends you an invoice, it can be found in the *Invoices* section. Under *Invoices → Status report - Invoices* you can search through all of your invoices and export them to Excel. To do this, mark the checkboxes next to the invoices and select the *Output - Excel* option from the drop-down list above the *Results* table.

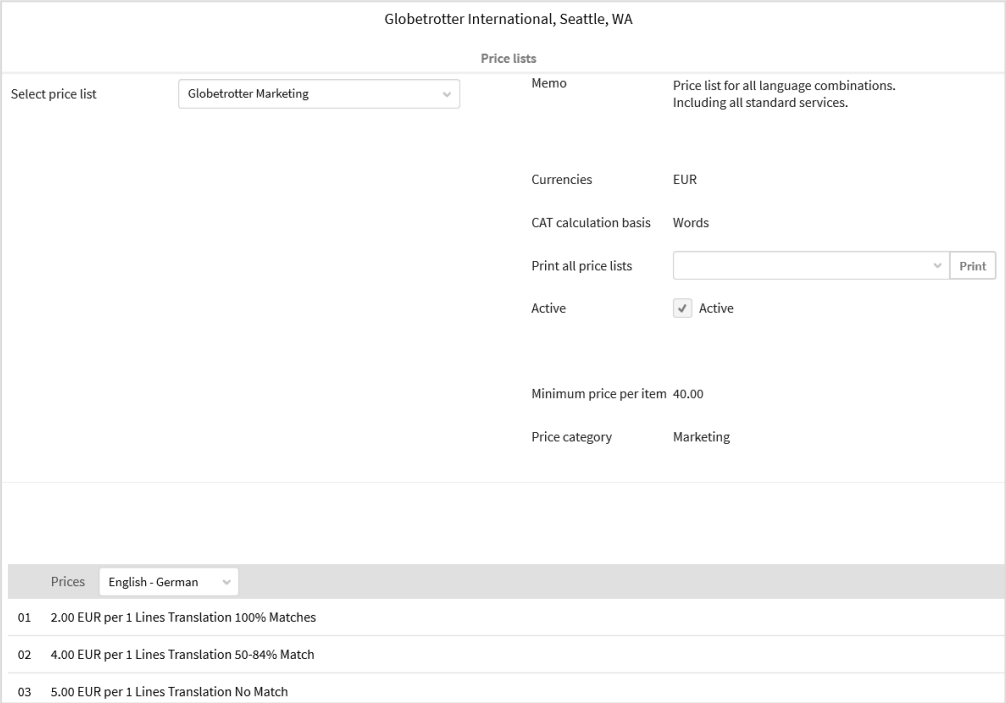

Result

Output - Excel OK

Invoices	Invoicing date	Invoice amount	Net	Tax	Gross	Paid	Outstanding
I-800053	29-02-2016	3,264.28 EUR	2,743.09	521.19	3,264.28	3,264.28	
I-800052	17-02-2016	35,700.00 EUR	30,000.00	5,700.00	35,700.00	35,700.00	
I-800051	16-02-2016	19,613.58 EUR	16,482.00	3,131.58	19,613.58	19,613.58	
I-800050	16-02-2016	28,625.45 EUR	24,055.00	4,570.45	28,625.45	28,625.45	

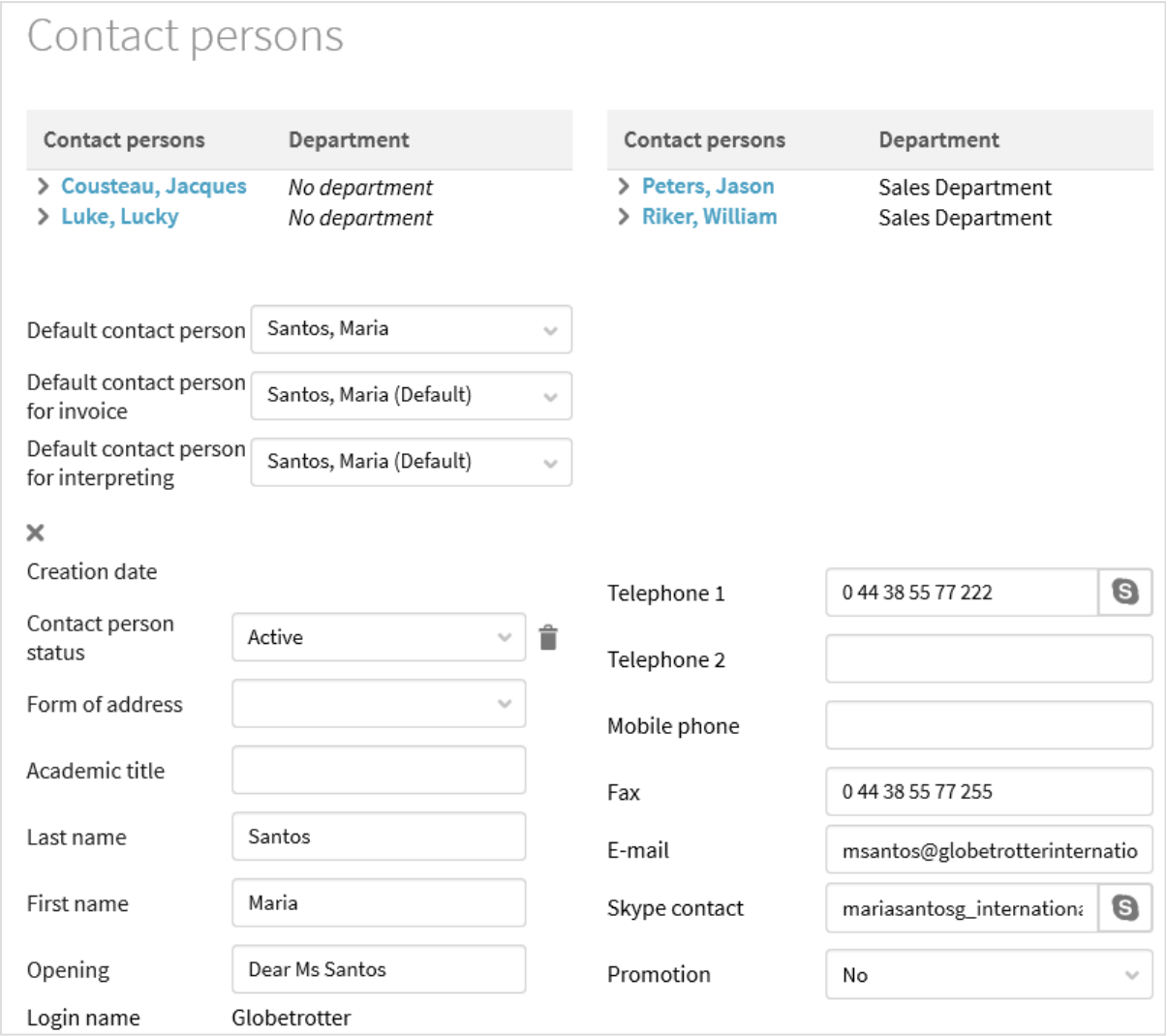
Prices

In the *Prices* section, you can view your price lists and see the costs for the different prices per language combination.



My Data

You can view and edit your own data in the *My Data* section. For example, you can select default contact persons, modify the contact details for your contact persons, check the company addresses and account information and manage the rights assigned to your users.


Contact persons
Contact persons
Department
Cousteau, Jacques
No department
Luke, Lucky
No department
Contact persons
Department
Peters, Jason
Sales Department
Riker, William
Sales Department
Default contact person
Santos, Maria
Default contact person for invoice
Santos, Maria (Default)
Default contact person for interpreting
Santos, Maria (Default)
Creation date
Contact person status
Active
Form of address
Academic title
Last name
Santos
First name
Maria
Opening
Dear Ms Santos
Login name
Globetrotter
Telephone 1
0 44 38 55 77 222
Telephone 2
Mobile phone
Fax
0 44 38 55 77 255
E-mail
msantos@globetrotterinternatio
Skype contact
mariasantosg_internationa
Promotion
No

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Plunet

Plunet BusinessManager

The business and translation management system of your choice

September 2019

www.plunet.com

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01 Introduction

Plunet in Numbers

COMPANY	**2003** *Founded*	**3** *Sites*	**50+** *Employees*
PRODUCT	**20+** *Integrations & modules*	**11** *UI languages*	**No. 1** *TMS worldwide*
USERS	**450+** *Customers*	**50+** *Countries on 6 continents*	**50k+** *Users per day*

Stefan Dümig
Managing Director
Plunet GmbH

"

We recognized the need for a centralized system that combines all the steps of the translation management process – from customer requests to vendor assignment to invoicing. Plunet BusinessManager provides a way for project managers, customers and vendors to collaborate on projects in a single software. Together with a team of committed and knowledgeable staff in Germany and the USA, we constantly develop innovative solutions for our international client base.

That's why today Plunet BusinessManager is the world's leading business and translation management solution, highly automated and customizable to individual requirements.

Plunet and the Challenges of the Translation Industry

The language and localization industry today is characterized by the use of modern technologies, which are continuously being developed. Translation management systems, CAT tools with integrated translation memories, and automated workflows have become indispensable for the daily work of language and translation service providers. To remain competitive in this rapidly changing industry, you need to be able to complete translation projects quickly, securely and efficiently. Integrations with other tools help to keep processes as lean and efficient as possible.

What makes Plunet special?
Founded in 2003, the IT company Plunet offers a top-class business and translation management system: Plunet BusinessManager. From the very beginning, Plunet has focused on the changing needs of the industry, always one step ahead. Over 450 customers across the world — primarily language service providers and internal language departments — use Plunet to successfully manage their business processes.

Plunet offers you:

- A central platform for project managers, customers, and vendors.
- Automated workflows.
- Simple and secure options for data transfer.
- A high level of flexibility for different target groups, organizational forms, and for dealing with changes.
- Extensive reporting options for analysis and evaluation.
- Seamless integrations with CAT tools and third-party software.

With Plunet, you can:

- Significantly reduce project lead times.
- Save time and money.
- Achieve long-term growth.

“When we started at the beginning of the 1990s, we carried out our management processes manually. Once the company started to grow and digitalization increased, there was a need and a market for a system that helps to effectively organize business processes across multiple locations.

Edward Vick
CEO
EVS Translations GmbH

02 Settings

The Admin Area

Adjust the system to your requirements

Plunet BusinessManager contains an extensive Admin Area where you can customize the system to your requirements and specifications. You can make global settings for all tabs, menus and functions in the system and define what your users can see and do in Plunet.

- Set up the e-mail client to send e-mails directly from the system.
- Create user accounts for your colleagues, clients and vendors.
- Manage access rights in the system to ensure that information is only seen by authorized users.
- Define customizable elements such as additional text fields and logos to personalize the system.
- Create document and e-mail templates in multiple languages.
- Set up different user interface languages for international users.
- Define the types of services that your clients can request in projects.
- Define standard price units and price lists for clients and vendors.
- Activate UI languages in the system (English, French, German, Italian, Japanese, Korean, Polish, Portuguese (Brazil), Portuguese (Portugal), Russian, Spanish) or upload your own language files.

Document & E-mail Templates

Customizable for individual needs

Document and e-mail templates are a central part of Plunet. Impress your customers and suppliers with professional communication, appealing corporate design and a personal touch. Customizable e-mails, documents and forms will help you manage projects more efficiently from A to Z.

Personal and professional project communication
Plunet provides templates for all documents and e-mails sent from the system: quotes, order confirmations, invoices, purchase orders, etc.

You can customize the pre-defined templates down to the last detail to fit your preferences and the requirements of your customers. With a wide variety of editable fields, the customization possibilities are endless.

Personalize your templates for your customers
Different customers have different needs. You can create different template sets and assign them as needed. You also have the opportunity to fine-tune the message and recipients of manual e-mails before sending them.

Do you need document templates for your translation projects in two, five or even more languages? With Plunet you can create templates in as many languages as required.

Security & Data Protection

Keep maximum control

Data protection has top priority at Plunet. We invest strongly in securing our infrastructure and fulfilling the current data protection standards. In this way, we can ensure the security of your data and make it possible for your work with Plunet to comply with data protection rules.

More security and convenience at login

Two-factor authentication (2FA) guarantees maximum security at login. Whether vendors or customers, all operating levels are doubly secured by the necessary password verification.

With the Single Sign-on (SSO) function, you do not need any additional login data. After a one-time authentication, you have access on all computers and to all services for which you have authorization. You no longer need to log in every time.

An additional security level can be activated if the user forgets their password. To reset the password, a Captcha needs to be entered as a security code.

Protecting your data from external attacks and loss

Plunet uses TLS (SSL) encryption for safe data transfer and communication using the HTTPS protocol.

In addition, the system and every new Plunet release is checked and continually protected from external attacks by regular internal OWASP (Open Web Application Security Project) tests and outsourced penetration tests.

Daily automated tests of the current development release ensure excellent stability and performance of the software and thus provide great protection against data loss.

Plunet and the EU GDPR

The EU GDPR has resulted in some significantly stricter framework conditions for collecting and processing personal data. Plunet provides you with the following functions for working in accordance with the GDPR:

When you create new contacts in Plunet BusinessManager, they can be automatically notified that their data has been collected.

You can specify the place where the first contact was made, in order to verify the source of contact for the collected data.

Contacts can request the deletion of their data at any time. The time of deletion depends on the specified retention periods, after which the data will be deleted automatically.

In the Plunet Online Help you can find a detailed overview of the personal data that can be stored within Plunet.

Advice on data protection and security

We'll help you when you don't know what to do. Our team is happy to assist you with any questions and queries about data protection and security.

“

Plunet has a high standard of security which is complemented by SwissGlobal's ISO 27001-certified IT environment. This ensures that customer data are always fully protected.

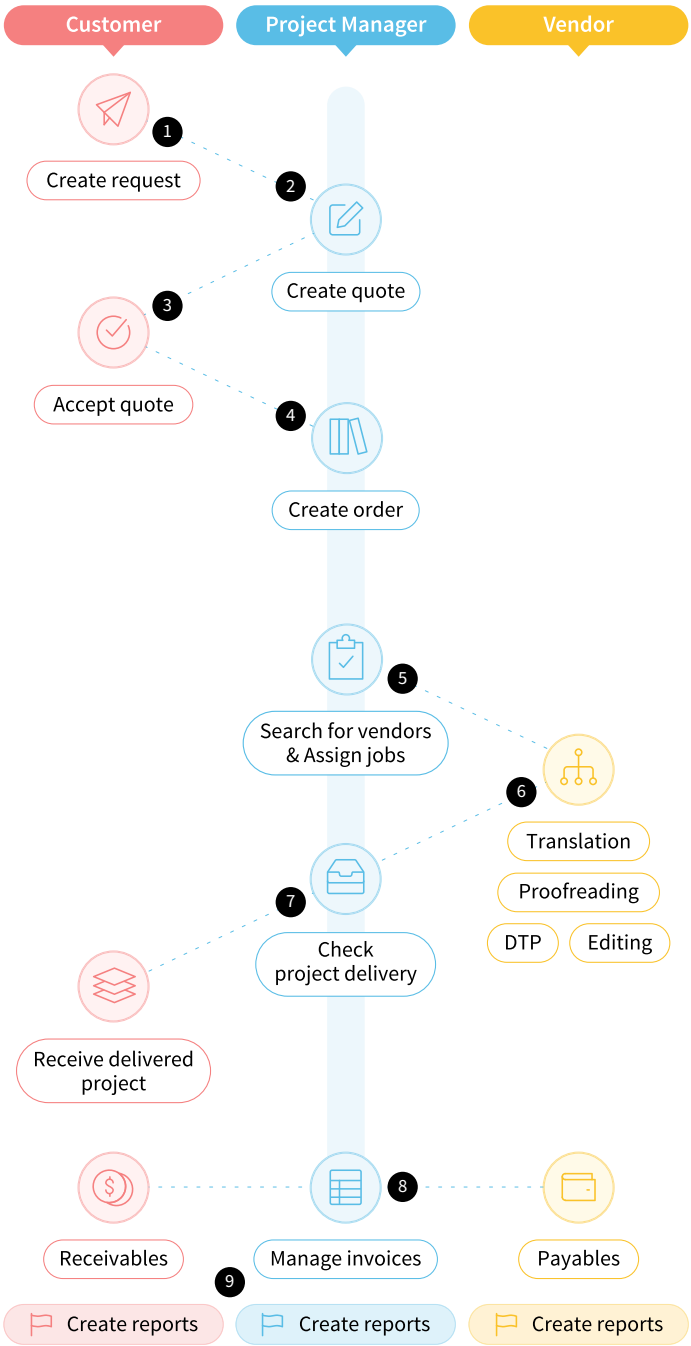
Mark Cheetham
COO
SwissGlobal Language Services AG

03 The Plunet Workflow

Project Management

Organize your projects step by step

With Plunet, you have total control over your translation projects, from A to Z. From requests to orders to invoicing, your project management portal always gives you an overview of all files, prices, and the progress of your projects. As a result, you can always intervene where necessary and adjust processes as required. With automated workflows and a wide variety of customizable templates, you can save a lot of time and process your project quickly and efficiently.



1. **Customer request**
Customers can request a quote or place an order in Plunet BusinessManager using the Customer Portal. All project and reference files can be uploaded in the Customer Portal quickly and securely. Requests can also be sent via e-mail, API or CMS.

2. **Quote creation**
You can quickly create quotes using templates that are already filled with information such as customer details and language combinations. If you work with a CAT tool integration, you can select the CAT interface at the quote stage and automatically calculate the prices for the project.

3. **Quote acceptance by customer**
Customers can accept a quote in the Customer Portal or request an alternative quote if it does not match their requirements.

4. **Order creation and management**
Orders in Plunet can be created from a quote, from a request if a quote is not required, or from scratch. Information from the request or quote is directly transferred to the corresponding order.

5. **Vendor search and job assignment**
Search for suitable resources based on your own customizable criteria and assign them directly or send a job request.
↓ See more detailed information on page 9

6. **Job workflow and automation features**
Use pre-defined workflows for your projects (e.g. Translation-Editing-Proofreading). These workflows are displayed clearly in the system and can be customized to fit your requirements. All steps/jobs in the workflow can be created individually and there is no limitation to the number of workflow steps and workflows that project managers can create and select. Every workflow step has individual settings, such as access rights, work instructions, selection filters and automation settings.

Manual and repetitive tasks can be reduced to a minimum thanks to Plunet's automation features. Project files delivered by one resource can be automatically passed on to the next resource in the workflow so that they can seamlessly continue with

their assigned job. The next job in the workflow is automatically triggered when the designated status is reached, and the next resource can begin their work.

7 **Project delivery**

Once all of the resources have delivered their jobs and the jobs have been approved by the project manager, the finalized project can be delivered to the customer. Plunet offers multiple delivery methods: You can deliver the whole project to the customer at once, or each language combination individually. The files can be delivered as an e-mail attachment, via a download link in an e-mail or the customer can download the files directly from the Customer Portal.

8 **Invoice management**

Create invoices in Plunet for completed projects and send them to your customers. You can also compare the invoices sent by your vendors with the approved jobs in Plunet, or vendors can create their own invoices in the Vendor Portal.

↓ See more detailed information on page 10

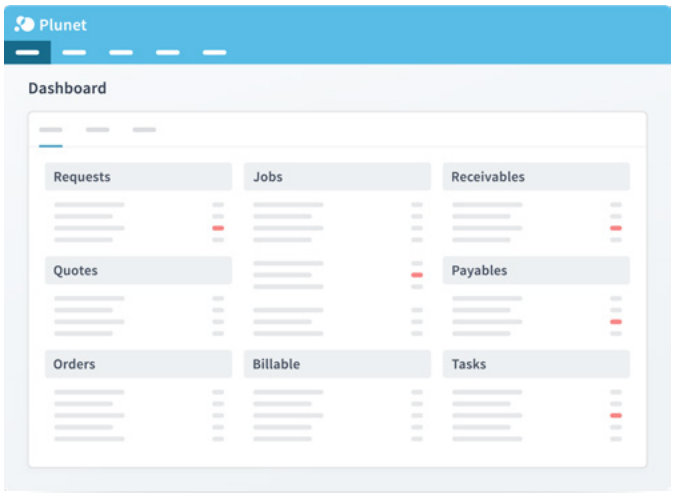
9 **Reporting**

Create status reports to track the progress of your projects, or run reports on gross profit, project feedback, new customers, and more. Customers and vendors can also run their own reports in the Customer or Vendor Portal.

↓ See more detailed information on page 9

The Dashboard

All project information at a glance



Plunet's Dashboard is the core of the system, letting you focus on what is really important to you. The Dashboard gives you an overview of all important project information – from requests, quotes, and orders, to tasks, deadlines, and invoices – so that you always know what you need to do next.

Always up-to-date

The Dashboard keeps you up-to-date on the progress of your projects and any changes that have been made. Your team members' updates are processed in real time, while updates made using automatic workflows are displayed immediately. Overdue orders, jobs, and invoices are highlighted in color, giving you a quick overview of urgent tasks. You can also filter the Dashboard to hide certain sections and only display the most relevant information.

Individual and team Dashboards

Thanks to Plunet's flexible rights management, you can give your users access to individual Dashboards and create Dashboards for whole teams or branches so that you can view their projects separately.

Vendor Management

Find suitable vendors for your jobs

With the integrated vendor search in Plunet, you will quickly find the most suitable resource for each job requested by your customers. Plunet provides you with a wide variety of options for finding and assigning vendors.

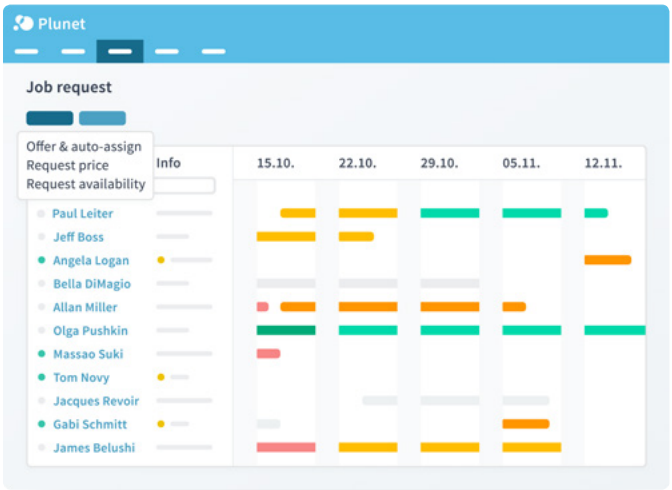
Find the best vendors for resources quickly
Do you already know the best vendor for the job? Then simply enter the name of the vendor to open their calendar and check their availability.

If the choice is not clear, then you can use a wide variety of customizable filter criteria to find the right vendor. For example, you can filter by field of expertise, availability, price list or language, compare the results of the search and pick the best vendor for the job.

Automated options for vendor assignment
Plunet also provides you with a number of options for vendor assignment. There are customizable e-mail templates for every option, which can be sent to the vendors automatically.

Have you already made your selection and checked the vendor's availability? Then you can immediately assign the job to the vendor. You can also assign multiple jobs to the same vendor at once.

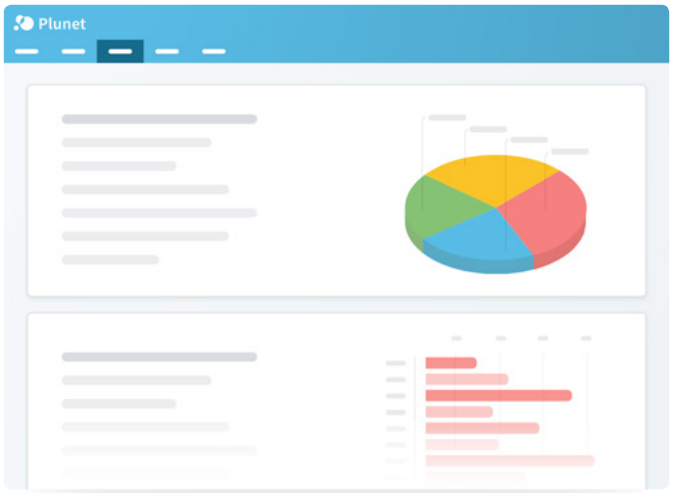
If you are not sure which vendor should work on the job, then you can request their availability or send an e-mail with the job details to multiple vendors. The first vendor to accept will be assigned to the job (first come, first served).



Reports & Queries

For informed decision-making

Data help you to make informed decisions: The more specific, the more useful. With Plunet you can use a broad range of customized queries and status reports for successful project controlling. And we can guarantee that the results will change your way of working in the long run.



Below is a selection of the questions that Plunet can answer for you:

- How many projects were completed in the last month?
- Which language combinations are the most important?
- Which of my customers were particularly active last month?
- Which vendors have received positive feedback?
- How much money did I spend this week on freelancers and internal staff?
- How many quotes are currently pending?
- How high is my gross profit per project / per language combination / per customer?
- Which customer yielded the most revenue for me in the last month?
- How much revenue do I make per target market?

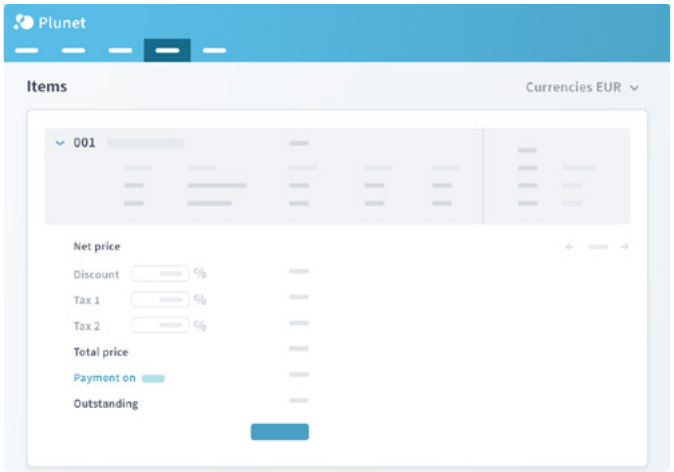
Invoice Management

Handle your payables and receivables in the system

Processing and organizing invoices costs time and energy. With Plunet's functions for a better overview, efficiency and control, you not only save a lot of time, but you might even enjoy invoice management.

All invoices at a glance

Plunet gives you an overview of the status of your customer and vendor invoices. You can also run reports on specific invoices. Outstanding and paid invoices can be found easily. In addition, you can set up pop-up reminders for invoices that have not yet been paid.



Save time with collective invoices

Do you want to invoice all of the projects that a resource has completed in the last month in one go? Or group all of a customer's orders in a single invoice? Both are possible with the collective invoice function.

Integration of external accounting tools

Plunet's file-based interfaces to a variety of accounting tools make it possible to export the invoices that you have created in Plunet and process them in your accounting system.

Assistance during invoicing

When you create a project in Plunet, suitable price lists and tax rates are suggested and copied to the invoice. Incomplete invoices cannot be sent. Pop-up messages remind you to check invoices for customer specifications, reducing the risk of error.

Country-specific requirements

When invoices are created in Plunet, country-specific requirements can be taken into account, such as SAF-T in Portugal, QR invoices in Switzerland and E-Invoicing in Italy.

Vendors can manage their own invoices

Your vendors can give invoices their own invoice numbers and manage all of their invoices in the Vendor Portal.

Automate reminders

Reminders for payment can be sent to customers automatically. You can also specify payment deadlines and fees for each reminder.

04 Customers & Vendors

Customer and Vendor Prices

Manage prices with flexible price lists

How do I know which price to set for a translation, for a certain language or for a certain customer? Where do I see the prices that I have agreed with my customers? How do I know which vendor is the most cost-effective? Many questions, one solution: With Plunet's price lists, you can keep track of all prices in the system.

All prices at a glance

Price lists give you a quick overview of the prices that you have agreed with your customers and vendors. They contain the language combinations and corresponding prices per service. You can create standard price lists for all customers and vendors and then make adjustments for each specific customer or vendor. You can also assign multiple price lists to a single customer or vendor and differentiate between them based on properties such as industry or scope of service. In this way, you can ensure that the correct price list is always used in a project.

Prices per service and language

In Plunet you can define the services that will be provided in projects, such as translation or DTP. The prices for these services can be calculated using a wide variety of pre-defined and/or customized price units. In this way, you can create general or individual price lists and use them to calculate prices in your projects. Price lists can be adjusted to your requirements and can contain as many price units as you need.

> *Since we have multiple longstanding client agreements, the ability to create and save multiple price lists for various customers is key. Everything vital to our business – customer and vendor information, quotes, invoices, deadlines, payment status, and more – is in the system. I would be lost without Plunet.*

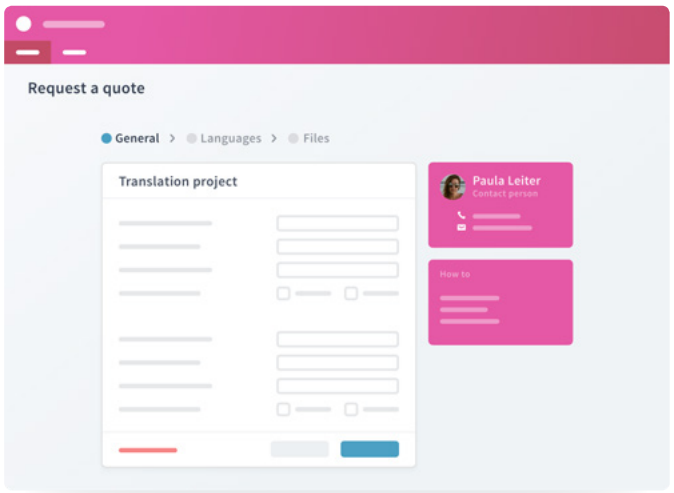
Yuri Ivanov
CEO
IVANNOVATION Language Management

Automatic price calculation

No more manual calculation. No more searching for prices. When you create a project in Plunet, a suitable price list is suggested automatically, making manual price calculation a thing of the past. The total price of the project is calculated automatically. In this way, you can save a considerable amount of time when creating quotes.

The Customer Portal

Simplify collaboration with your customers



With Plunet's Customer Portal, you can directly integrate your customers in the project workflow. Thanks to the straightforward request process, transparent overviews of project statuses, and editing options, your customers will know everything that is relevant for their cooperation with you. No matter if you are processing translation projects or interpreting projects – with the Customer Portal, you will reduce manual work and gain valuable time.

Easy to use

Your customers can view all of their requests, quotes, orders, and invoices at a glance. With just one click, they can request projects, accept or reject quotes, upload project files via drag and drop, and download finalized projects securely from the Customer Portal. It is also possible to include your customers in the production workflow by letting them review a project before it is delivered.

Flexible and customizable

The Customer Portal can be customized to fit your customers' individual needs as well as any modified conditions. In the Admin Area, you can set up individual text fields, templates, and rights for customers and customer groups. Your customers can also create and view status reports on different aspects of their projects. The layout of the portal itself can be adapted to your customers' requirements, for example with a customized logo and header.

Complete transparency for you

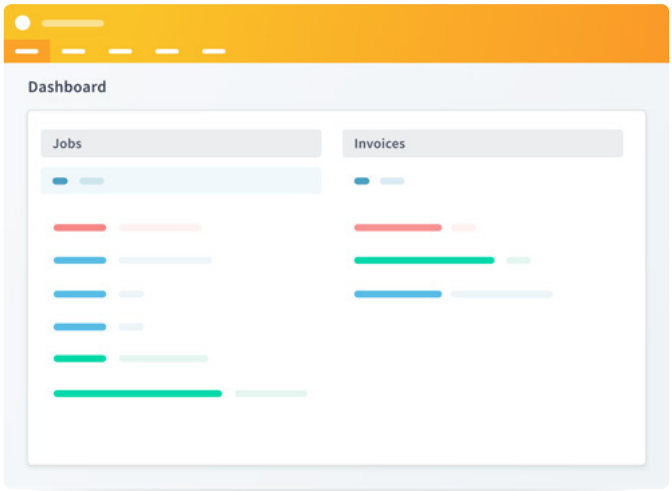
Updates and changes made by your customers are automatically documented, which means that you can track projects in real time. As a project manager, you will always be up-to-date on all of your projects and can immediately intervene whenever necessary.

“Our Project Management team started using Plunet BusinessManager back in 2008. It has proven to be a reliable and constantly evolving translation management system that helps us with our everyday planning, monitoring and the automation of our processes. Plunet adapts to our needs and gives us and our clients a clear overview of all our quotes, orders and invoices.

Effie Salourou
Customer Operations & QA Manager
CGT Commit Global Translations Ltd.

The Vendor Portal

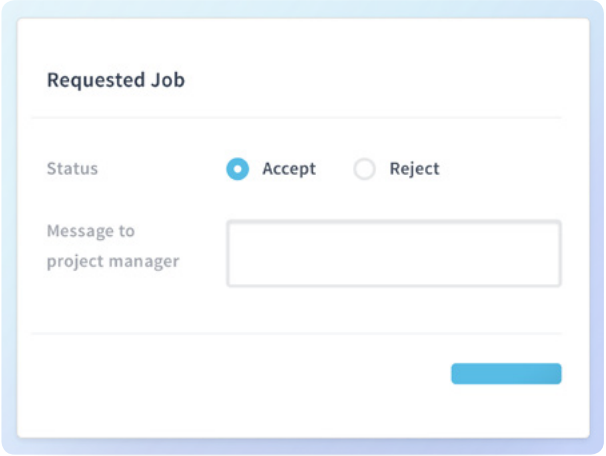
Simplify collaboration with your vendors



With Plunet's integrated Vendor Portal, you can include your external vendors in your working processes and simplify how you work with them. They can access all important project files and information in once place, maintain an overview of their jobs, and save valuable time.

Individual customizations are possible

You can customize the Vendor Portal according to your requirements, both visually and in terms of content. Plunet also includes a sophisticated rights management, which makes it possible to adapt the portal for each vendor. Your vendors can modify their own profile data and specialist skills, enter their availability and absences, view their prices and resource assessment, create and manage invoices, and communicate with you via the integrated e-mail client.



Detailed job overview for vendors

All of your vendors – agencies, freelancers, internal translators, interpreters – have their own Dashboard. The Dashboard will inform them about the current status and deadlines of the jobs that they are currently working on for you. When you send a job request, the vendor can accept or reject the job via an e-mail link or in the portal. Plunet sends automatic notifications to your vendors to inform them of project status updates. Vendors can also create detailed status reports about their jobs, invoices, and time sheet.

Invoice management in Plunet

After a job has been approved, your vendor can create the invoice digitally in the portal. The invoice will then appear in your system for further processing and payment. The payment information is saved in the vendor's profile and can be updated there.

05 Integrations & Modules

Expand Your System to Fit Your Needs

As a language service provider, you spend your time working with different software providers, such as CAT tools, content management systems, and financial accounting software, which require you to switch back and forth between systems. As a Plunet customer, you can benefit from our CAT tool integrations, modules, and the Plunet API, in order to manage your business and production processes centrally on a single platform. In this way, you reduce your manual work and gain valuable time.

Integrations

CAT Tool Integrations

Connect CAT functions with Plunet

With Plunet, you can seamlessly connect all of the leading CAT tools, which are indispensable for professional translation processes. The integrations save you both valuable time and unnecessary costs. The different integration levels can be split into static and dynamic CAT integrations.

Static CAT integrations
With Plunet's file-based integrations, you can import CAT analysis files into Plunet and apply them to your projects. In this way, both project and job costs can be calculated quickly and automatically.

Partners: Across (Across Language Server), Alchemy (Catalyst), Atril (Déjà Vu), JiveFusion (Fusion), memoQ (memoQ), Memsource (Memsource Cloud), Microsoft (Helium), Practiline Software (PractiCount and Invoice), SDL (SDL MultiTrans, SDL Passolo, SDL Trados Studio, SDL WorldServer), Star (Transit), Lionbridge (Translation Workspace), Wordfast (Wordfast), XTM (XTM Cloud)

Dynamic CAT integrations
The dynamic CAT interfaces provide a complete integration and automation of the most important functions from our partner CAT tools. From project creation with customized templates to automatic price calculation and job assignment, you can process all of the necessary steps of your translation management process, without leaving Plunet. In this way, you maintain complete control over the entire management process of your projects.

Partners: Across (Across Language Server), memoQ (memoQ), Memsource (Memsource Cloud), SDL (SDL Trados GroupShare, SDL Trados Studio), XTM (XTM Cloud)

Plunet API

Seamless integration of third-party software

The Plunet API provides you with the possibility to fully streamline your processes and integrate Plunet BusinessManager with accounting and CRM software. With the different Plunet API services, you can manage all contacts, projects and invoices within Plunet and exchange project data with your customers.

Thanks to the high level of automation, you will save a great amount of time in your daily project work by using the Plunet API.

"We are constantly impressed by the flexibility and adaptability of this translation management system. Its numerous interfaces facilitate seamless integration with other software applications, and substantially increase the efficiency of our translation workflows.

Katharina Krause & Kristina Lange
CEOs
TL Translationes GmbH

Modules

Quality Management

Achieve high-quality results

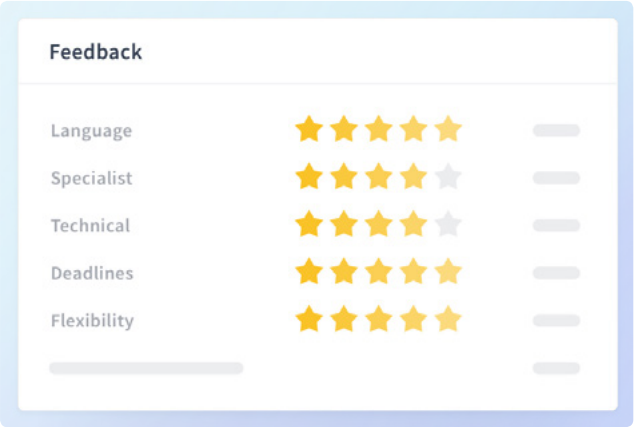
The quality management functionalities in Plunet help to increase production standards, improve customer satisfaction and facilitate internal reporting.

All in one place

Project managers, quality managers, vendors and customers can be involved in the quality management process in Plunet. Feedback on jobs and orders, performance reviews for vendors, job or order complaints can all be entered in Plunet BusinessManager. All the data can be used to improve the quality of future projects and for internal reporting purposes.

Track vendor performance

In Plunet BusinessManager, you can assess your vendors internally and calculate their overall rating based on your own selected criteria, for instance punctuality, language skills, technical know-how and more. With Plunet's additional QualityManager module, you can also track the performance of your vendors directly in the system. You can assign the very best vendor for your project based on the vendor assessment.



Track customer satisfaction

Enhance your quality management processes by collecting customer order feedback in the system, based on fully customizable criteria. Customers can rate projects directly in the Plunet Customer Portal, and you can track this feedback in Plunet. Alternatively, feedback can be entered internally by project managers or other members of the team.

"We chose Plunet because we need a system which is capable of a high level of integration and offers carefully standardized workflows within the scope of our certified quality management processes. This is exactly where we see one of the major strengths of Plunet BusinessManager.

Christian Enssner
CEO
EnssnerZeitgeist Translations GmbH

Transparent complaint management

With QualityManager, project managers and customers can create order complaints directly in Plunet. You can define different complaint types and their consequences, as well as restrict who can see or edit complaints in the system. It is also possible to track the costs incurred due to complaints and how you dealt with the issue (revision of the translation, discount for customer, etc.). In addition, job-specific complaints can be created, linked to order complaints and tracked for internal use. The collected information can be captured in reports and helps increase customer satisfaction and vendor management in future projects.

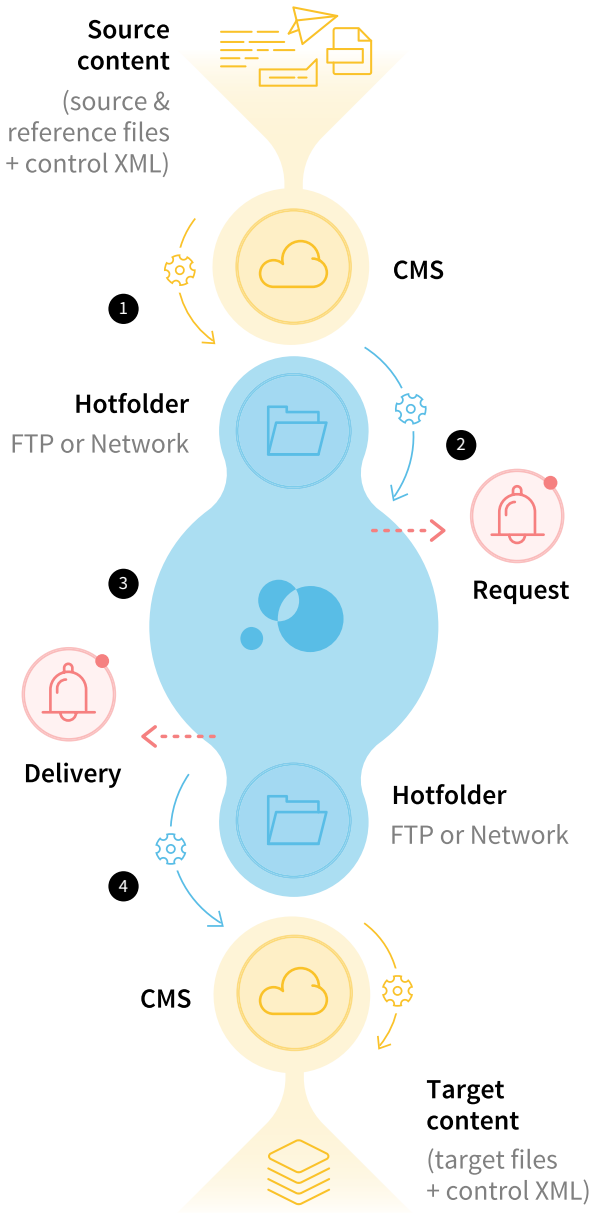
Certified translation management workflows

Guaranteeing ISO 17100:2015 compliance is significantly easier with Plunet BusinessManager. You can monitor the compliance of your workflows with the ISO 17100 norm by using the ISO functionality in Plunet. If you specify that a project should be ISO 17100 compliant, then only vendors who also fulfill ISO 17100 criteria will be suggested for the project. Furthermore, you will be alerted if a project is not structured to be ISO compliant, for example, if the four eyes principle cannot be guaranteed because a review job is missing.

EventManager

Connect CMS/DMS with Plunet

The Plunet EventManager module makes it possible to seamlessly integrate your customers' content management or document management systems in Plunet. In this way, you can automatically pull the content to be translated from the respective system and deliver them back to the system after processing. This not only saves administration costs, but also valuable time.



Requirements for using the Plunet EventManager module

- The CMS/DMS supports multilingual contents.
- The CMS/DMS has import and export functions.
- The CMS/DMS supports API calls for accessing source files.
- The project metadata can be created in the CMS/DMS or attached.
- The files can be zipped into a package.
- The FTP server provides an access option for the vendor.
- The COTI standard is supported and the data exchange between the editorial and translation memory systems is guaranteed.

The workflow with Plunet EventManager

1. You will automatically receive requests and orders as data packages from your customer's CMS/DMS. The required content (source and reference files) can be called from folders in the local network or FTP or WEBDAV servers.
2. After a defined period of time, the EventManager module checks whether or not new data packages have arrived and sends you automatic notification e-mails to announce new projects.
3. The project files can be automatically analyzed by a CAT tool if you are using a dynamic CAT integration with Plunet.
4. When the target files have been automatically delivered, EventManager creates return packages and stores them in a folder in the local network, on an FTP or WEBDAV server. The CMS/DMS of your customer can automatically call this folder and thus has direct access to the required contents. You will be informed of new deliveries via e-mail.

AutomationManager

Automatic project processing with Plunet

How many hours do your project managers spend manually creating quotes and orders, not to mention sending the corresponding e-mails and documents? With Plunet's AutomationManager module, your project managers have more time to focus on other important tasks. Projects are created in the system automatically, without any intervention from the project manager. Prices and job dates are calculated automatically and checked to ensure they are realistic. The entire process is quicker for customers and saves your project managers valuable time.

Reduced workload for project managers

Project managers can put their feet up with the Plunet AutomationManager module. As soon as your customer submits a request, the quote or order is created automatically in Plunet. The system calculates the prices of the items via Plunet's dynamic integration to the CAT tools memoQ or SDL. Project managers only need to act when it comes to job assignment. This can save a considerable amount of time, decrease project management costs and maximize customer satisfaction by providing immediate feedback.

"Every day we receive requests in standardized formats via the Plunet Customer Portal. Thanks to Plunet's AutomationManager, the workload for our project managers can be reduced by up to 90 percent. Our PMs only have to intervene at critical points in the workflow that require human control and decisions. A huge time-saver!

Peter Seltsam
CEO
Eurotext AG

Fail-safe automation

If everything is automated, what happens when errors occur? AutomationManager will take care of it: The built-in plausibility check ensures that the prices and dates in the project are checked before the project starts. The delivery dates requested by the customer are checked to make sure that they can be complied with. The calculated prices and planned time for the project are also analyzed. If there are any problems, the project manager will be notified immediately by the system and can step in.

AutomationManager: How does it work?

Your customer creates a request in the Plunet Customer Portal.

↓

Depending on the request, either a quote or an order is automatically created based on the request.

↓

Prices for the project are calculated using the CAT tool analysis.

↓

The dates of the project are checked for validity.

↓

The quote or order confirmation is sent to the customer.

↓

In the case of a quote, the corresponding order is automatically created in Plunet as soon as the customer accepts the quote.

↓

The dates for each job are automatically calculated.

↓

The project manager assigns vendors to the jobs.

ConfidentialityManager

Four levels of confidentiality for more data security and control

Plunet not only gives you an overview of all your projects, but also complete control over all files that are exchanged within the system. With the add-on module ConfidentialityManager, you can assign one of four confidentiality levels to your projects to define how project files can be exchanged:

- Files can be uploaded and downloaded in Plunet without restrictions.
- Files can only be downloaded in encrypted form and a password is required to access the documents.
- Vendors can only work on the documents on an internal server.
- No project files can be uploaded or downloaded in Plunet. The vendor completes the job for the customer on site.

Confidentiality levels can also be assigned to individual vendor and customer profiles to ensure that only people with the appropriate confidentiality rights work on a project.

InterpretingManager

Easy handling of interpreting projects with Plunet

Does your company provide interpreting services as well as translation or plan to do this in the future? Plunet gives you the perfect solution for both. With our additional InterpretingManager module, you can add a powerful interpretation management platform to your Plunet system in a simple and cost-effective way.

One system for all projects

One great benefit of the integrated Plunet solution is that you have a management system with a joint database for all interpreting and translation projects, as well as the management of your customers and service providers. With just a single click, your customers can decide whether they want to request a translation or an interpreting project in the Customer Portal.

Easy resource management

Plunet helps you to find and assign suitable interpreters in a quick and easy way. You can customize your search by combining any number of search criteria. This includes:

- Languages
- Distance to event location via OpenStreetMap integration
- Price of the interpreter
- Customer feedback
- Customizable properties

Efficient job management and flexibility

Job templates can be used to send job requests to interpreters. Interpreters can directly accept the jobs via e-mail without needing to log into their own systems, which ensures quick turnaround times. The first interpreter to accept is assigned to the job automatically. Plunet's resource pooling also makes it possible to send requests to multiple resources at once.

The working dates for interpreting jobs are automatically attached to the job request and job assignment e-mails. The file can then be imported into your Outlook calendar, where you can set reminders for jobs or projects and synchronize them with Plunet.

At the click of a button, jobs can be canceled, new jobs can be created and automatically sent to the interpreters. In the same way, Plunet automatically reminds resources about their upcoming jobs with a reminder e-mail. The system tracks everything and even makes it possible to create reports on canceled jobs.

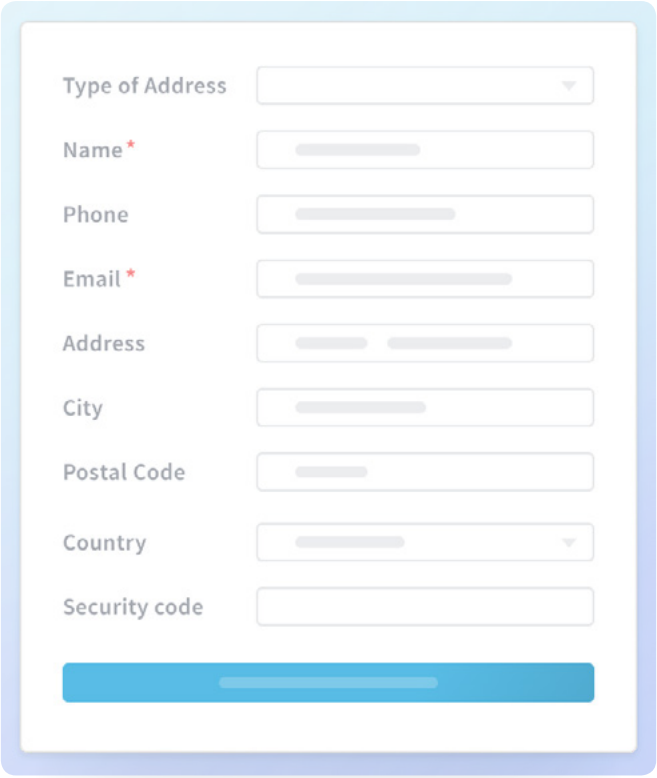
VendorRegistrationManager

Time-saving application process for new vendors

With the add-on module VendorRegistrationManager, your vendors can register themselves in Plunet BusinessManager. This speeds up the entire application process and will save you a lot of manual work.

Customize each step in the Plunet Admin Area
Set up the registration process for your vendors step by step in the Admin Area. In addition to contact, price, and payment information, you can specify mandatory fields for language skills and user-defined properties such as specialist subject areas and additional qualifications. It is also possible to incorporate your terms and conditions into the registration process, which makes the whole process even more efficient.

VendorRegistrationManager provides you with templates for e-mails, which are automatically sent once your vendors have completed the registration.



The registration form for Plunet
After the registration steps have been defined in the Admin Area, your vendors can use the registration form to register themselves in Plunet. The form can be adapted to your individual requirements and embedded in your website. After filling in and submitting the form, the vendor will receive an e-mail with login details and a link to register in Plunet BusinessManager.

You will be automatically notified about every new registration and can check the application details of the new vendors before they are added to the official vendor database.

“

The VendorRegistrationManager is a great module because it saves time for vendor managers, who can easily vet the vendor profiles that get created in the system after online registration. On top of that, terms and conditions can be updated directly in the system and have to be accepted by vendors – new and existing – before they can work on projects.

Sophie Halbeisen
Director of Business Development (Americas)
Plunet Inc.

06 Implementation & Support

The Plunet Implementation

Learn how to use the system

The Plunet implementation can be personalized according to your needs. The standard implementation takes place online with your implementation specialist. If required, part of the User Training can also be done on-site. Your implementation specialist will address all needs and questions during a kick-off meeting and will offer various training options to ensure the implementation is efficient and fits in with your everyday work.

The implementation process differentiates between two types of Plunet users:

Admin users
The administrators of the system who are responsible for making any required changes after training is completed, such as setting up e-mails, dealing with server matters, etc.

Internal users
Project managers, vendor managers, accountants, etc., who will use Plunet to handle all or part of their daily work.

What does the project evaluation and implementation phase look like?

1. Kick-off Meeting
Initial meeting with your implementation specialist to designate project teams, coordinate data import, training schedules, and installation.

2. Installation
The installation can be done on your server, on Plunet's server or on a third-party server and will usually be completed online by our support team. Some of our clients prefer to perform the installations/upgrades themselves due to security regulations, but this can also be done by Plunet engineers.

3. Data Migration Services
The implementation specialist explains the data import sheets that help to import customer and vendor data before the start of the training phase. You convert the data of your existing database (customers, internal resources, vendors) into the format of the import templates and return them to Plunet. Plunet converts the database templates and imports them.

4. Admin Training
Participants in the Admin Training should have extensive knowledge of your company's internal production workflows. A system administrator needs to be appointed. During the Admin Training, your system will be set up based on your needs and requirements. Admin settings include:

- Definition of countries and languages
- Creation of properties and text modules
- Definition of jobs, services and workflows
- Setup of document and e-mail templates
- Creation of users and rights groups
- Creation of price units and standard price lists for customers and resources
- Setup of security and e-mail settings

5. System Check
System check after pre-configuration (individual system checks as needed).

6. User Training
Training for all internal resources that will use Plunet on a daily basis. During the User Training, different user groups learn how to work with the system after it has been configured based on your requirements. For example:

- Working with the Dashboard
- Receiving requests, creating quotes, orders, jobs, workflows, and invoices
- Managing customers and vendors in Plunet
- Working with the Customer Portal and Vendor Portal
- Creating and running reports

7. Integration Training
Integration setup (e.g. for dynamic CAT tool integrations) and training for users.

8. Q&A Sessions
Question and answer sessions before and after go-live.

"The way the Plunet team coordinated the necessary training and implementation was amazing. Our implementation trainer inspired us with tutorials that were tailor-made to our requirements.

Hadi Ghazala
Managing Director
AGATO Legal Translation

The Plunet Support
Service benefits for you

Quick responses, empathy, and solution-oriented help – these are the characteristics of the Plunet support team. Whether in Europe or in the USA, you can count on our experienced staff to support you with their expertise. Within the scope of your service and maintenance contract, you can benefit from continuous support and many other service benefits.

Plunet ticket system
As a Plunet customer, you have access to the ticket system and can use this platform to publish your questions, ideas and suggestions. You can check the current status of your enquiry at any time and view the processing history. Enquiries that are marked as "urgent" will be dealt with as a priority.

Plunet Support services at a glance

- Installing Plunet BusinessManager
- Upgrading the system with every Plunet release
- Worldwide first, second and third level support
- Support via e-mail and ticket system

Additional service benefits in your customer contract

- Automatic updates
- Detailed release notes for every new version
- Webinars

The Plunet Implementation Team

Peggy

Simona

Sofia

Sonia

Susan

The Plunet Support Team

Alex

Andreas

Bernhard

Daniel

Michael

Sylvester

07 References

Customer Stories

Our customers tell their Plunet stories

How Akorbi Boosted its Growth Potential
Learn more →

How ALT Translations Achieved over 85 Percent of Cost Reduction
Learn more →

Ready for Change? Follow the Example of CQ fluency's Fruitful Change Management
Learn more →

How Centralization Became the Key to Success for EVS Translations
Learn more →

How MCIS Turned Cost Savings into Social Investments
Learn more →

How Netwire Improved Their Business Processes
Learn more →

How Sprachenfabrik Reinvented itself – Transformation as Strategy
Learn more →

This could be
your story

Send your ideas to
marketing@plunet.com

Do you want to know more **about Plunet?**

Request a demo →

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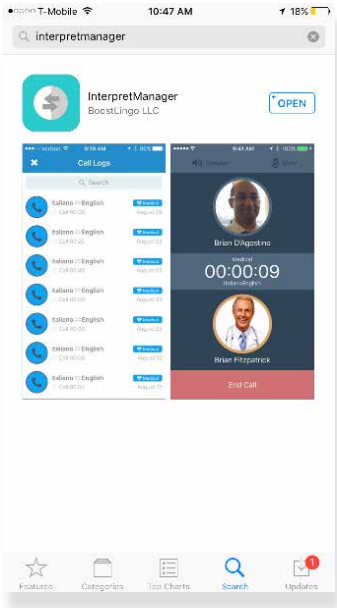
Legal Notice →

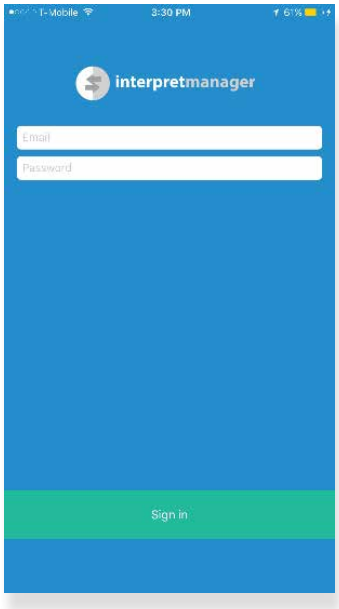
VRI Quick Start Guide (IOS and Android)

For Requestor



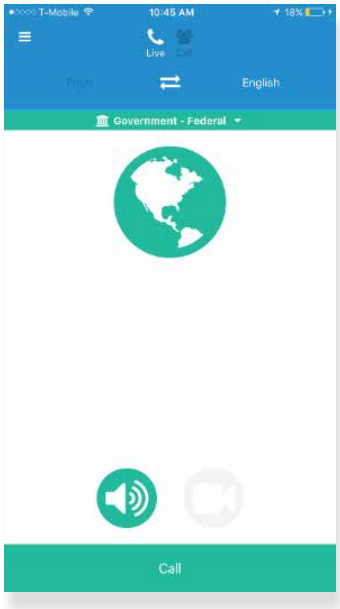
Step 1

To use VRI on your smartphone or mobile device, visit the App Store or Google Play and search for **"InterpretManager"** Download and install the app.



Step 2

Log in using the username and password you created.



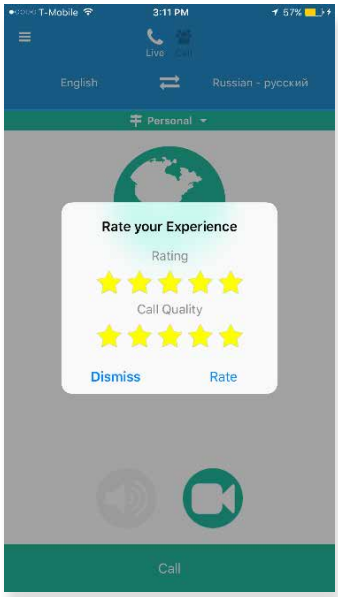
Step 3

Home view will display **three options:**

1. "From" and "To" language required
2. The service type needed
3. The modality of the call is required. Select the **video camera icon for VRI.**

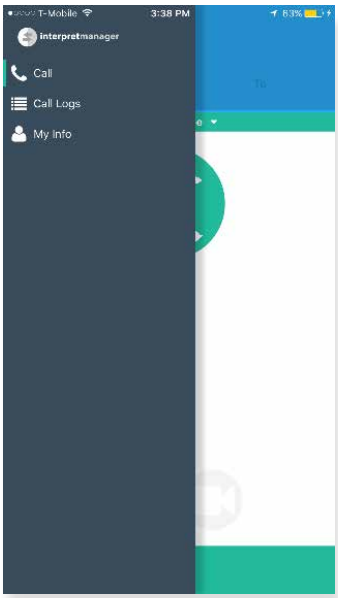
Step 4

Once you have selected all the options, the next step is to place the call by clicking once on the **call button.**



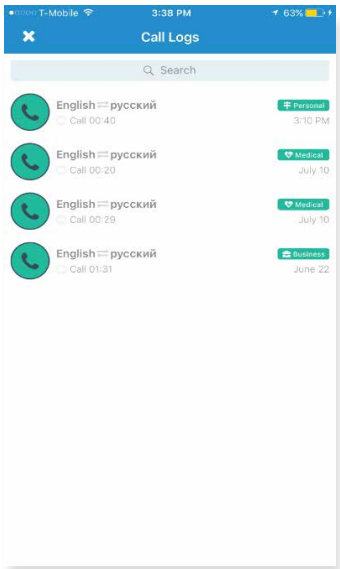
Step 5

Once the call has been completed, you will be prompted to **rate the interpreter and the call quality.**



Step 6

You can access the Call Logs from your mobile device by selecting the options menu in the **top left corner.**



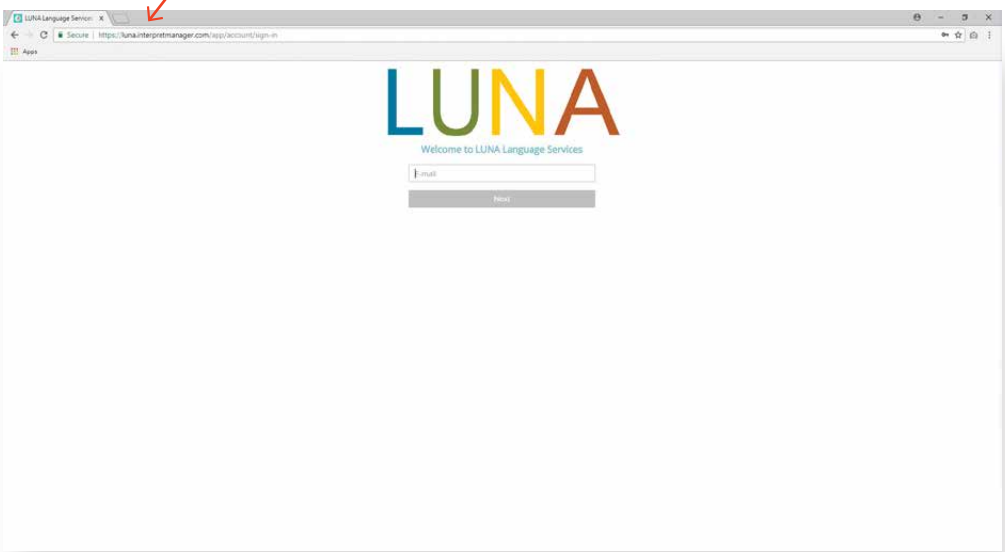
Step 7

Select "Call Logs". Note: the call logs on the mobile are limited. If you want to see more detailed logs you will need to log in to the web portal with your credentials.

VRI Quick Start Guide (Desktop/Laptop)

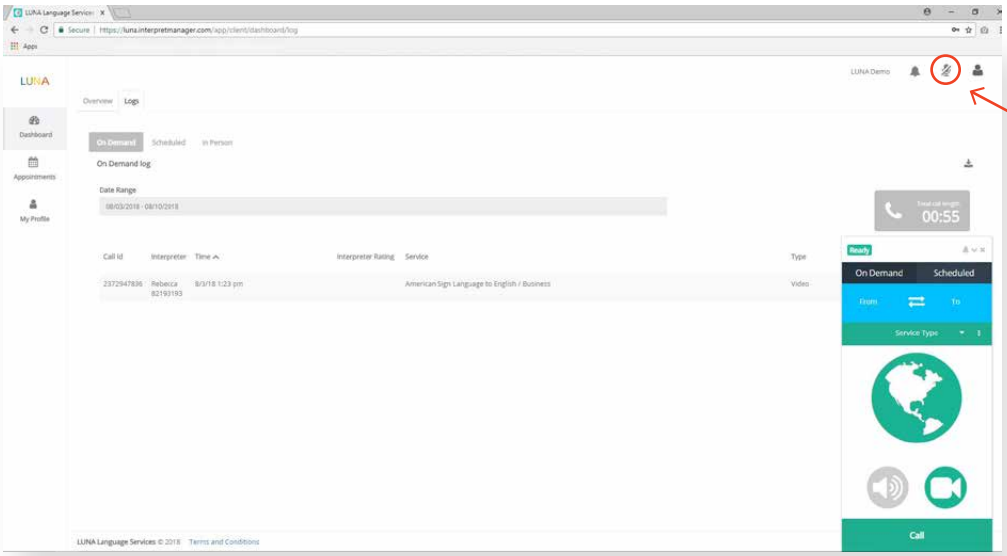
For Requestor

luna.interpretmanager.com



Step 1

Visit luna.interpretmanager.com and log in using the username and password you created.

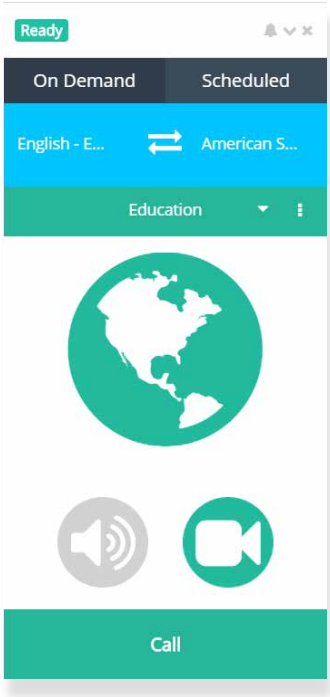


Step 2

If the caller window isn't open, **click on the microphone icon** on the top right of your screen.

8935 N. Meridian Street, Suite 250 | Indianapolis, Indiana 46260 | USA
317 341 4137 | LUNA360.com | info@LUNA360.com

LUNA



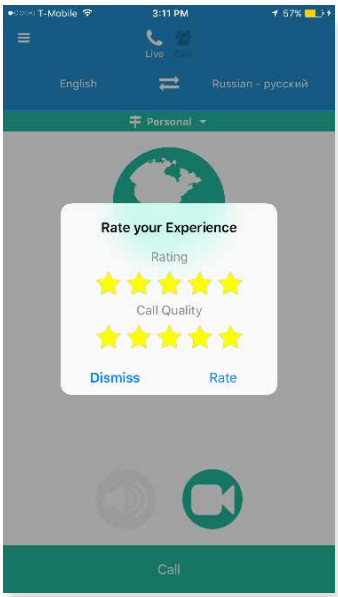
Step 3

The caller window will display **three options:**

1. "From" and "To" language required
2. The service type needed
3. The modality of the call is required. Select the **video camera icon for VRI.**

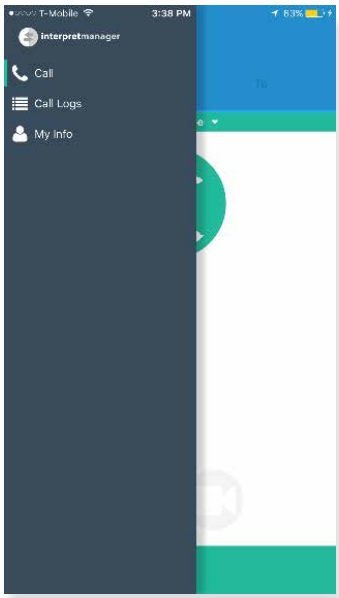
Step 4

Once you have selected all the options, the next step is to place the call by clicking once on the **call button.**



Step 5

Once the call has been completed, you will be prompted to **rate the interpreter and the call quality.**



Step 6

You can access the Call Logs from your mobile device by selecting the options menu in the **top left corner.**

Minimum Tech Requirements

For optimal use of the application, check for the following requirements.

Desktop/Laptop Hardware

Intel: 2.0 GHz or faster second-generation Intel Core i3, i5, i7 CPU or newer Quad-core processors or newer

AMD: 1.8 GHz or faster AMD Athlon 64 X2 processor

NOTE: Faster processors provide higher video frame rates. While multi-core processors slower than 2.0 GHz will work, they are not guaranteed to provide the best video quality. Video pixelation and freezing may occur on systems that don't meet our processor requirements.

Memory: 2 GB RAM or more

Video Chipset: Discrete video card, or integrated Intel HD Graphics 3000 or better (found on second-generation (Sandy Bridge) or newer Core i3, i5, i7 processors).

Webcam: Any external, HD 720p or better webcam

Additional: Speakers/Headset/Microphone

Mobile Hardware and Software

Apple Mobile Devices: Requires version 8.1 or later. Compatible with iPhone, iPad and iPod Touch

Android Devices: All devices with mic and cam are supported and Require Android version 4.0 and up

NOTE: Video on older Android tablets and older iPads may not be suitable for VRI, especially for Sign Language/ASL interpreting. For ASL interpreting, we recommend newer Android tablets and iPads.

Minimum Tech Requirements

For optimal use of the application, check for the following requirements.

Desktop/Notebook/Windows Tablet Software

Microsoft OS (32-bit/64-bit): Windows 7, Windows 8.1 (Desktop mode), Windows 10

Apple Desktop OS: Mac OS X 10.8 (Mountain Lion) or higher

Web Browsers:

Google Chrome 52 (56 or newer recommended)
This browser is recommended for the better application performance. If it is not installed on your computer - you can easily install it from here: Chrome Download

Mozilla Firefox 35 (40 or newer recommended)

Network Requirements

Bandwidth: 2 Mbps upstream/downstream strongly recommended; minimum 1 Mbps upstream/downstream supported

4G LTE connections/mobile hotspots are sufficient for most situations with an adequate connection to your LTE service provider; however, LTE quality is heavily influenced by your location and by the number of users connected to the same cellphone tower as you. Interpreters should always rely on wired Internet service over LTE service for consistent network quality.

3G connections/mobile hotspots not recommended but may be sufficient for two-party calls when the 3G connection is not in use by other Internet applications and you have a strong connection to your 3G service provider

LUNA | Language Services

Provision and Invoicing of OPI Services

Below is a narrative of LUNA's provision and invoicing of OPI services.

1. A LUNA client expresses interest in LU37NA's OPI services.

2. LUNA's Language Services Manager sets up a CLI customer code for the new OPI client in CLI's online portal. CLI's online portal allows LUNA to configure up to four customizable columns for each client. These customizable columns instruct the CLI operators on what information to capture when a LUNA OPI client calls. LUNA's Language Services Manager customizes these four columns based upon each OPI client's specific invoicing needs.

3. A LUNA OPI client calls LUNA at 317-341-4317 or 844-777-5862.

4. A LUNA coordinator will enter into LSP Ware Atrium the OPI client's: name, date of OPI session, LEP name, and language.

5. Upon entry of the above details, LSP Ware Atrium generates a 6-digit Request Number. The LUNA coordinator assigns CLI as the interpreter for the OPI session.

6. The LUNA coordinator then connects to a CLI operator while the LUNA OPI client is on a brief hold. The CLI operator first asks for the customer code and then asks the LUNA coordinator questions in order to capture all the required for the LUNA OPI client in question.

7. The LUNA coordinator transfers the LUNA OPI client to the CLI operator who has the appropriate telephonic interpreter on the line. The CLI telephonic interpreter interprets for the LUNA client.

8. Upon completion of the OPI session, CLI's computer system automatically uploads to the CLI online portal all the session's relevant details such as: client name, LEP name, language, session start and end time, and duration in minutes.

9. LUNA invoices its OPI clients on a monthly basis. Prior to invoicing, LUNA's Accounting Department accesses CLI's online portal, enters a specific customer code, and can see the month's OPI calls for a given client.

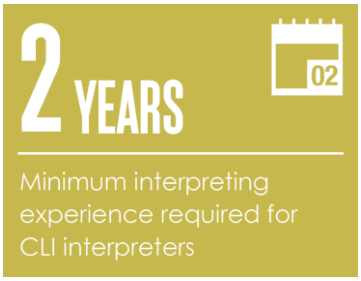
10. LUNA's Accounting Department references CLI's online portal in order to manually update, in LSP Ware Atrium, the session start and end time for each OPI call. LSP Ware Atrium then calculates the duration and client invoice total for each OPI call. LUNA's Accounting Department uses LSP Ware Atrium to generate the OPI client's monthly invoice. Through LSP Ware Atrium, LUNA can customize OPI invoicing based upon the client's preferences. If the client so desires, a LUNA OPI invoice could include: date of OPI session, session start and end time, duration, language and LEP name. Clients can also specify that their charges for OPI services be invoiced separately from charges for onsite interpreting services.

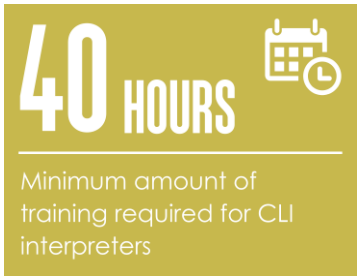
CERTIFIED LANGUAGES INTERNATIONAL

CLI's Professional Interpreters

Quality of CLI's Professional Interpreters

Certified Languages International (CLI) has a systematic method of separating bilingual speakers from qualified interpreters to ensure we are not a training ground for bilinguals; we are the standard for professional interpreter excellence. On average, our interpreters possess 7.68 years of interpreting experience prior to joining our team. CLI's interpreters bring at least 2 years of prior interpreting experience, have a minimum of 40 hours of completed training, and must pass our rigorous interpreting exam. The vast majority of CLI's interpreters have at least a bachelor's degree, and most of our interpreters are certified through nationally recognized organizations and/or have completed formal interpreter training programs.





Interpreter Certifications

CLI prioritizes working with professional interpreters who hold nationally recognized interpreting certifications through organizations that include:

- Certification Commission for Healthcare Interpreters (CCHI)
- National Board of Certification for Medical Interpreters (NBCMI)
- Department of Human Services (DHS)
- Administrative Office of the U.S. Courts

Interpreter Testing

After they have met the minimum qualifications, our interpreters must complete CLI's stringent interpreter exam with a score equivalent to at least a "Level 4 – Full Professional Proficiency" on the Interagency Language Roundtable (ILR) scale. Qualified interpreters at Level 4 and above on the ILR scale are able to use language fluently and accurately on all levels and as normally pertinent to professional needs; can understand and participate in any conversations within the range of own personal and professional experience with a high degree of fluency and precision of vocabulary; and can handle formal interpreting of the language.

CLI's comprehensive interpreter testing is conducted in languages comprising 99.98% of our monthly call volume. It covers not only language fluency in both English and the target language, but also requires interpreters to display proficiency in the following areas:

- Industry-specific terminology
- Memory retention skills;
- Message accuracy;
- Interpreting in the first person;

- Maintaining neutrality;
- Cultural competency; and
- Adherence to HIPAA, the National Code of Ethics for Interpreters, and the National Standards of Practice and Cultural Competence.

Testing confirms the interpreter is able to grasp sociolinguistic and cultural references, and possess the ability to accurately interpret almost all forms and styles of speech pertinent to professional needs as well as general topics and social conversation. Additionally, the interpreter must be able to manage the delivery, speed, and length of the statement (projection, pace, and pausing) of the speaker. In order to pass our rigorous testing, an interpreter typically must have completed comprehensive trainings offered through colleges, organizations, and other quality language service companies.

CLI continually reviews our interpreter testing standards and methodologies to ensure we remain at the forefront of the language service industry. We are in the process of rolling out a new interpreter skills assessment to evaluate our interpreters' language knowledge (in English and the target language) and interpreting proficiency. This proprietary test was created in collaboration with Dr. Jean Turner of the Middlebury Institute of International Studies at Monterey.

Testing criteria in this 3-part interpreter skills assessment include the following:

- **Part 1: Terminology**
  - Knowledge of industry-specific terminology
  - Varying levels of difficulty
- **Part 2: Statements**
  - Fluency in source and target languages
  - Ability to retain and render reasonably longer statements
  - Accuracy, completeness, and clarity
  - Effective note-taking skills
- **Part 3: Interpreting Scenarios**
  - Cohesiveness (pace, clarity, understandability, fluency, grammar, and pronunciation)
  - Interpreting skills and appropriate tone
  - Use of interpreter protocols
  - Message accuracy
  - First-person format
  - Memory retention skills
  - Transparency when requesting repetitions or clarifications

This new test is undergoing external, third-party validation, which involves analyzing the test development process and its outcome to confirm the test is valid, and verifying that the test is being scored with consistency and with consensus by different scorers. Testing procedures were developed according to both the standards of practice of the National Council on Interpreting in Health Care (NCIHC) and CLI's own expertise, informed by 20+ years of experience at the forefront of the interpreting industry. This test is currently being used to assess new CLI interpreters in Spanish, Arabic, Cantonese, and Mandarin, and we are working to significantly expand the number of available languages.

Interpreter Training

Language interpretation — whether spoken or written — requires specialized skills that can take years to be developed to a professional level, and much can go wrong when an inexperienced bilingual speaker is used to interpret instead of a trained, professional interpreter. One of the many advantages of using our independent contractor model is that CLI is not encumbered by the limitations of needing to hire bilingual speakers and then quickly provide in-house training on how to interpret. Many interpreting companies try to keep costs low by crash training bilingual speakers to conduct the work of a professional that simply can't be developed during condensed training courses.

In contrast, we utilize highly qualified, professional interpreters with at least 2 years of confirmed experience and 40 hours of training prior to working with our company. This ensures our interpreters are not learning the skills of interpreting while servicing calls — they are already fully trained subject-matter experts with advanced levels of interpreting proficiency by the point at which we contract with them.

CLI's interpreters have completed third-party training programs such as:

- Boston University's Interpreter Certification Program
- Middlebury Institute of International Studies at Monterey's Interpretation & Translation Program
- Cross Cultural Health Care Program (CCHCP)'s "Bridging the Gap" Medical Interpreter Training
- Southern California School of Interpretation's Professional Interpreter Program
- Portland Community College (PCC)'s 120-hour Interpreter Training Program
- Southern Maine Community College (SMCC)'s courses, totaling 100+ hours

Prior to taking any calls for our company and on an annual basis thereafter, all of CLI's interpreters are also required to complete training/certification for HIPAA, CMS (Centers for Medicare & Medicaid Services), and FWA (fraud, waste, and abuse) prevention. This training is conducted online through a third-party learning management system; satisfies and reflects federal training requirements; and enables CLI to closely track, monitor, and document the completion of this training.

Ongoing Interpreter Training

CLI considers ongoing education and professional development to be instrumental to the quality of our interpreters. To ensure our interpreters are routinely informed about emerging standards and updated on new client-specific and industry-specific terminology, CLI maintains a rigorous continuing education program with monthly newsletters, webinars, and frequent email communication with our interpreters. To ensure the continued excellence of our interpreters, CLI also regularly distributes training updates that include:

- Compliance and regulations
- Interpreter ethics
- Role-playing scenarios
- Industry-specific terminologies
- Updates of practices and procedures
- Customer-specific updates to protocols

Our interpreters continually confirm that CLI providing these resources on a consistent basis enables them to grow in their profession and remain up-to-date on current trends and standards in the language industry. Our Interpreter Services Department regularly notifies our interpreters of any ongoing education, training, and/or professional development opportunities that arise in their locale. Additionally, we strongly encourage all of our interpreters to attend relevant seminars and conferences, enroll in upcoming interpreting and language courses,

and increase their involvement with the local and regional language community so their interpreting skills and language proficiency continue to develop along with the industry.

Additionally, all CLI interpreters have access to interpreting courses through VoicesACADEMY. These specialized online courses are designed broadly for interpreters in any language, can be accessed at any time, and allow interpreters to earn continuing education credits. Training sessions last from 20 to 70 minutes. Interpreters must complete a test at the end of each training module to obtain continuing education credits. Courses provide training in a range of interpreting topics, enabling interpreters to expand their skill set and enhance their professional practice. VoicesACADEMY also offers a number of interpreter resources, such as online glossaries with thousands of terms.

VoicesACADEMY is accredited by:

- American Translators Association (ATA)
- Washington State Department of Social & Health Services
- Certification Commission for Healthcare Interpreters (CCHI)

Specializing in Healthcare Interpreters

CLI has maintained an enormous commitment to the healthcare industry since our inception. Our company's ongoing focus on healthcare has led us to require that all interpreters must complete annual training for HIPAA, Centers for Medicare & Medicaid Services (CMS), and fraud, waste, and abuse (FWA) prevention, in addition to completing an intensive medical interpreter credentialing process. CLI also cultivates a healthcare-focused education program for interpreters.

To ensure that all of our interpreters are qualified to adeptly interpret in diverse healthcare environments, CLI's medical interpreting exam evaluates the interpreter's knowledge of medical terminology, consisting of varying levels of difficulty and from different medical specialties; includes a medical interpreting scenario; and assesses language proficiency for a breadth of healthcare terminology, such as:

- Anatomy and physiology
- Medical conditions
- Pathology, symptoms, and treatment
- Medical tests and diagnostic procedures
- Abbreviations and acronyms

Overview of Professional Interpreter Model

Benefits of Professional Interpreter Model

CLI's model of using professional, U.S.-based interpreters advantageously equips us with a virtual network of thousands of interpreters across the country. This enables us to provide rapid connect times, seamlessly handle unexpected spikes in call volume, offer services in rare languages that are nearly impossible to staff in brick-and-mortar call centers, and offer the greatest redundancy.

CLI has been instrumental in developing and embracing an independent contractor model for interpreters since our inception. One of the fundamental reasons driving this emphasis in our business model is that 93% of all professional interpreters are independent contractors[1]. The vast majority of interpreters who are specifically skilled, educated, and trained in the profession prefer the autonomy and versatility inherent to being an independent contractor.

[1] Source: http://contractinterpreters.com

We carefully select professional interpreters who possess advanced language proficiency with industry-specific expertise, which ensures accuracy and minimizes call times.

Accordingly, CLI has found that the most qualified interpreters in the country are independent contractors. As self-employed professionals, our interpreters know that their livelihood and income depend on their ability to perform skillfully and in full compliance with HIPAA, the Gramm-Leach-Bliley Act, and the Health Information Technology for Economic and Clinical Health (HITECH) Act. We carefully select professional interpreters who possess advanced language proficiency with industry-specific expertise, which ensures accuracy and minimizes call times.

Using contract interpreters means we only pay them for the actual time they spend on the phone interpreting. This model makes it possible for us to keep our costs low, so we can afford to work with the highest quality interpreters in the country and compensate them duly, which further contributes to our consistently high interpreter retention rates. Most interpreters who partner with CLI maintain long-term working relationships with our company. We provide a strong support network to address any challenges, disseminate best practices and language resources, and extend continuous constructive feedback.

Offering our interpreters a dynamic, challenging, supportive, and rewarding work environment contributes positively to their continued quality of performance and reinforces their loyalty to our company. Additionally, our high interpreter retention rates allow us to focus on continuing to expand the diverse languages in which we offer interpreters. Another reason we value the independent contractor model is that it is impossible to locate interpreters for all the languages CLI supports in any one geographic region of the country. Partnering exclusively with interpreters who are independent contractors enables us to select from the most elite pool of experienced interpreters across the country, which would not be possible under a traditional employee model.

Examples of Contractor Models in Other Industries

The independent contractor model has proven to be a valuable, effective framework in many industries. For example, the U.S. Department of State staffs only 20 interpreters as employees, yet it contracts with over 1,000 interpreters who are independent contractors[2]. In addition to the U.S. government, other professions that reflect the contractor model include accountants, court reporters, dentists, doctors, lawyers, medical transcriptionists, and veterinarians.

Limitations of Traditional Employee Model

The vast majority of interpreting companies rely on employees to service their calls. Relying predominantly on employees severely limits a company's ability to remain flexible. When spikes (which are never planned, always urgent, and typically critical in nature) in volume occur, a company using the employee model is forced to triage out of normal operating procedures in order to increase staffing. They must hope that their backup contractors are free, rely on back-office vendors, and/or hope that employees who are not on duty are available to come in unexpectedly, which typically results in overtime pay — costs they must factor into their price per minute. As such, the employee-based model makes it much more difficult to quickly react to spikes in call volume, and these companies simply cannot afford to staff more interpreters than are anticipated.

[2] Source: http://www.state.gov/m/a/ols/index.htm

Comparison of Interpreters Models

Interpreters in Brick-and-Mortar Call Center	Decentralized, Professional Interpreters in Home-Based Model
Average Age of Interpreter: 23	**Average Age of Interpreter:** 38
Workforce Demographics: ▪ 30% have some college-level experience	**Workforce Demographics:** ▪ 80% have college education ▪ 30% are multi-lingual ▪ 93% of all professional interpreters are independent contractors ▪ 40% of professional interpreters have been working independently for 15 years or more ▪ 75% of all independent interpreters are women
Recruiting: Recruiting is limited to commutable area surrounding call center	**Recruiting:** Can recruit/select from a wider pool of experienced professionals, thus reducing the risk of settling on interpreters who don't meet/exceed requirements and qualifications
Spikes in Call Volume: Limited means to expand to accommodate call spikes and volume shifts based on number of interpreters physically sitting in call center	**Spikes in Call Volume:** Ability to respond immediately to call spikes, volume shifts, natural disasters, and national emergencies due to virtual base of interpreters with broad geodiversity
Ability to Support Rare Languages: Very limited in finding interpreters who speak languages of lesser diffusion in close proximity to call center	**Ability to Support Rare Languages:** Can efficiently access interpreters for languages of lesser diffusion all across the U.S., expanding the number of professional interpreters available for each language *and* the number of languages of lesser diffusion for which interpreting services are available
Additional Notes: ▪ Being an independent contract interpreter allows for more professional flexibility. Many of CLI's interpreters are also language instructors, interpreting instructors, and belong to professional interpreter associations. ▪ Retention rates (and reflectively, job satisfaction rates) of interpreters are typically much higher for interpreters who are independent contractors. The average tenure of CLI's interpreters is 5.2 years.	

Electronic Timesheet Report

Service For: Margo Chabot

Job/Request # **6816**

Customer DHHS
123 Sample Address

Indianapolis, IN 46260

Phone

Interpreter	Language	Duration	Start Time	End Time
Smith	French	1	Jul 12, 2020 5:11 PM	Jul 12, 2020 5:48 PM

Approved By:

Survey Rating: **4** ★★★★

Kimberly Cotton

Printed Name of Staff Member
Jul 12, 2020 5:50 PM

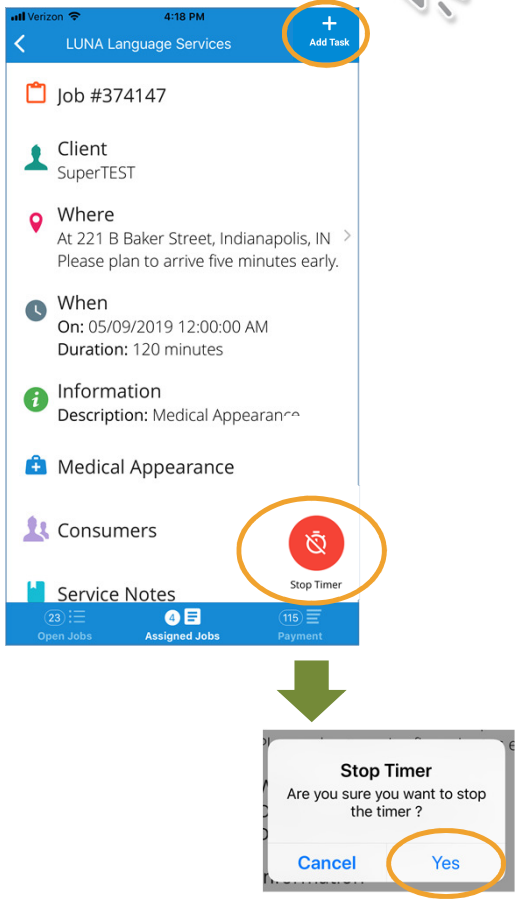
Signature of Staff Member

Thank you for your business.

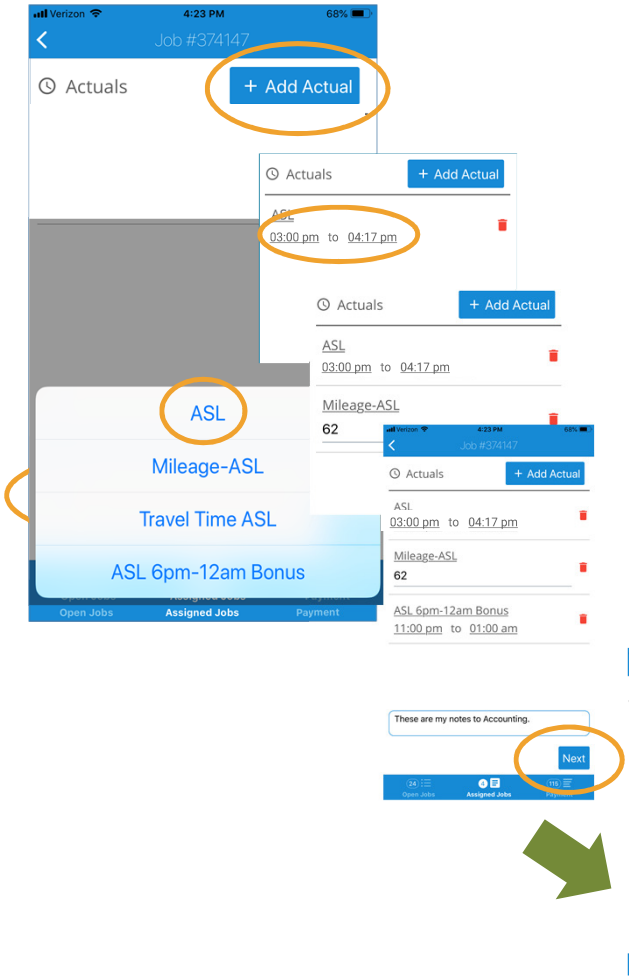
Atrium Mobile App Digital Timesheet Entry

"TAG" a Job on the App

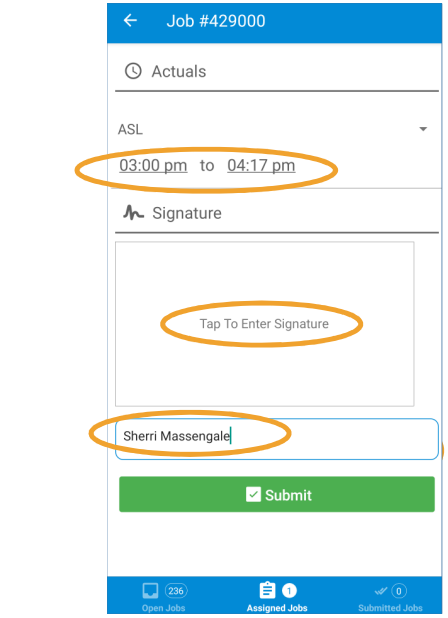
T-Timer Starts



A-Add Task



G-Get Name & Signature



SUBMITTED!

Sample Boostlingo Appointment Log

(As Seen From Client Portal)

LUNA

Dashboard

Appointments

Invoices

Configuration

Dashboard

LUNA Demo

Overview | Logs

On Demand | Scheduled | In Person

On Demand log

Requestor: All

Date Range: 06/29/2020 - 07/06/2020

Call Status: Connected

Total call length 09:28

Call Id	Call Status	Interpreter	Time	Requestor	Interpreter Rating	Service	Type	Queue/Hold Time	Duration	Other Participants	Conference Duration	Account Charge
115332755567	Connected	SUNITA 82198167	6/29/20 1:52 pm	Wesley Bremer	5/5	English to TEST / Medical	Video	18s	00:04:49			
115327472586	Connected	SUNITA 82198167	6/29/20 1:48 pm	Wesley Bremer	5/5	English to TEST / Medical	Video	37s	00:02:30			
115325551532	Connected	SUNITA 82198167	6/29/20 1:47 pm	Wesley Bremer	5/5	English to TEST / Medical	Video	10s	00:00:39			
115322189726	Connected	SUNITA 82198167	6/29/20 1:44 pm	Wesley Bremer	5/5	English to TEST / Medical	Video	14s	00:01:30			

8935 N. Meridian Street, Suite 250
Indianapolis, Indiana 46260
USA
P 317.341.4137
VP 317.286.6382
F 317.550.2468

LUNA360.com

Sample Client - 12345
Accounts Payable
12345 Sample Street, Suite 100
Indianapolis, IN 46204

Invoice No	I-00001
Invoice Date	12/31/20
PO Number	LEP identifier/other identifier

Project : Collective invoice

Item	Price ($)
1.O-08386.01 - Requester and number/Agency -Project Title-LEP number-Translator and ID-Reason for translation - English (USA)/Spanish	
7822 TEP Word(s) at $0.50	$3,911.00
2.O-08475.01 - Requester and number/Agency -Project Title-LEP number-Translator and ID-Reason for translation - English (USA)/Burmese	
6341 TEP Word(s) at $0.50	$3,170.50
0.5 DTP Hour(s) at $50.00	$25.00
3.O-08489.01 - Requester and number/Agency -Project Title-LEP number-Translator and ID-Reason for translation- English (USA)/French	
7505 TEP Word(s) at $0.50	$3,752.50
4.O-08505.01 - Requester and number/Agency -Project Title-LEP number-Translator and ID-Reason for translation - English (USA)/Kinyarwanda	
800 TEP Word(s) at $0.50	$400.00
5.O-08506.01 - Requester and number/Agency -Project Title-LEP number-Translator and ID-Reason for translation - English (USA)/Karen	
800 TEP Word(s) at $0.50	$400.00
Total Price	**$6,280.45**

Payment due 01/31/21.

Please contact accounting@LUNA360.com with any questions.

Thank you!

LUNA Language Services

8935 N Meridian St, Suite 250 Indianapolis, Indiana, 46260 US

To:
Sample Client (ID 12345)

Invoice#: INV-00032-A
Invoice Date:
Due Date: (Net 30)

- Minimum, rounding and/or thresholds may apply

Calls: $180.00

Call	Type	Date/Time	Duration	Rate	Extras	Total
4973981271 English to American Sign Language	Video	1/4/19 6:49 pm	5 minutes, 46 seconds	$3.00 min	$0.00	$45.00
5157264921 American Sign Language to English	Video	1/12/19 6:49 pm	4 minutes, 46 seconds	$3.00 min	$0.00	$45.00
5463519119 English to American Sign Language	Video	1/24/19 1:06 pm	13 minutes, 49 seconds	$3.00 min	$0.00	$45.00
5524316169 English to American Sign Language	Video	1/26/19 6:52 pm	3 minutes, 35 seconds	$3.00 min	$0.00	$45.00

Calls :	$180.00
TOTAL :	$180.00

8935 N. Meridian St., Ste. 250
Indianapolis, IN 46260

Invoice

Date	Invoice #
9/30/2020	25104

Attn:
Sample Agency (ID 12345)
1111 Sample Address
City, State Zip

P.O. No.	Vendor ID	Due Date	Fed Tax ID
		10/31/2020	35-1111111

Serviced	Description	Rate	Quantity	Amount
	Consumer ID 232 - Job 313874 - 09/17/2020 - 10:25 AM - 10:40 AM -Burmese - Foreign - Terp Khenglawt ID 594 - Medical - 2.0 -100.0	50.00	2	*100.00*
	Consumer ID 221 - 313878 - 09/17/2020 - 1:00 PM -3:00 PM -Burmese - Foreign - Terp Thaung ID 632 - Medical -2.0 - 100.0	50.00	2	*100.00*
	Consumer ID 221 - 314182 - 09/18/2020 -1:00 PM -2:30 PM -Burmese - Foreign - Terp Thaung ID 632 - Medical - 2.0 - 100.0 -0.0	50.00	2	*100.00*
	Consumer ID 221 - 313877 - 09/19/2020 - 12:45 PM - 4:00 PM -Burmese - Foreign - Terp Thaung ID 632 - Medical - 3.25 - 162.5 - 0.0	50.00	3.25	*162.50*
	Consumer ID 221 - 314483 - 09/20/2020 - 8:00 AM - 11:00 AM -Burmese - Foreign - Terp Thaung ID 632 - Medical - 3.0 - 150.0 - 0.0	50.00	3	*150.00*
	Consumer ID 232- 310591 - 09/05/2020 -1:55 PM - 3:58 PM - Kinyarwanda - Foreign - Imanzi ID - medical - 2.25 - 112.5 -0.0	50.00	2.25	*112.50*

Thank you very much for your business!

Total ***$725.00***

Thank you for the opportunity to be of Service!

Phone #	Fax #	E-mail	Web Site
317-341-4137	317-550-2468	accounting@LUNA360.com	www.LUNA360.com

Sample Monthly Utilization Report - Interpreting

Monthly Utilization Report -- September 2020

Average Session Length: 60 mins.

Job ID Number	Status	Date of Service	Scheduled Duration (mins.)	Actual Duration (mins.)	Billable Duration (mins.)	Actual Start Time	Actual End Time	Agency
54343	Billed	9/20/2020	60	41	60	1:19 PM	2:00 PM	DHHS

*No shows will be marked in red font

Location	Language	Requestor	Consumer	Interpreter	Interpreter ID	Interpreter Home City	Interpreter Home State
123 Sample Address, Indianapolis, IN 46260	Burmese	Sally Smith (45)	Jane Doe (3)	Ellie Thang	934	Greenwood	Indiana

Hourly Rate ($)	Mileage Fee	Parking	Total Billed ($)
$35	N/A	N/A	35

LUNA

Sample Monthly Utilization Report – Translation

Sample Agency Projects

A	B	C	D	E
Orders	**Order date**	**Customer**	**Project name**	**Language**
O-00001	12/1/2020	Sample Agency	Sample Project 1-requester and ID-LEP number-reason for project	English (USA)/Spanish
O-00002	12/2/2020	Sample Agency	Sample Project 1-requester-LEP number	English (USA)/Spanish
O-00003	12/3/2020	Sample Agency	Sample Project 1-requester-LEP number	English (USA)/Burmese
O-00004	12/4/2020	Sample Agency	Sample Project 1-requester-LEP number	English (USA)/Spanish
O-00005	12/5/2020	Sample Agency	Sample Project 1-requester-LEP number	English (USA)/Spanish
O-00006	12/6/2020	Sample Agency	Sample Project 1-requester-LEP number	English (USA)/Spanish
O-00007	12/7/2020	Sample Agency	Sample Project 1-requester-LEP number	English (USA)/Spanish
O-00008	12/8/2020	Sample Agency	Sample Project 1-requester-LEP number	English (USA)/Spanish
Total				

F	G	H	I
Translator name and ID	**Rate per word**	**Status**	**Cost**
First Last 001	$ 0.50	Completed	$ 20.68
First Last 002	$ 0.50	Completed	$ 48.18
First Last 003	$ 0.50	Completed	$ 48.88
First Last 004	$ 0.50	Completed	$ 52.25
First Last 005	$ 0.50	Completed	$ 60.28
First Last 006	$ 0.50	Completed	$ 67.47
First Last 007	$ 0.50	Completed	$ 90.00
First Last 008	$ 0.50	Completed	$ 106.50
			$ 494.24

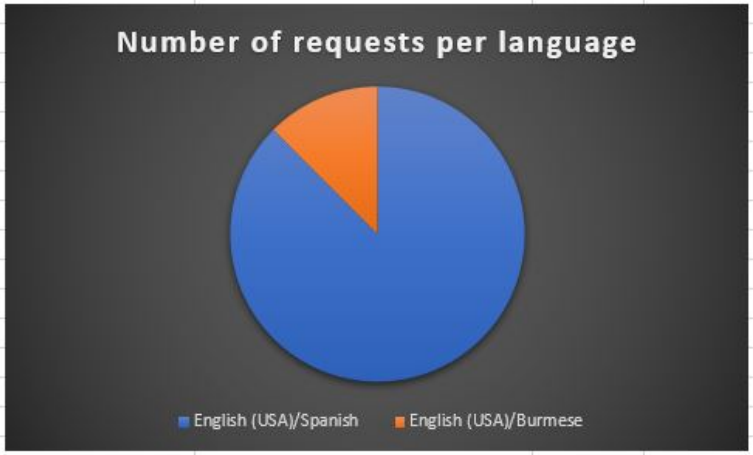
Sample Agency On-Time Delivery

A	B	C	D
Customer	**Delivered on time**	**% Share**	**Quantity**
Sample Agency	8	100.00%	8
Total	**8**	**100.00%**	**8**

LUNA

Sample Agency Languages

Language	Number of requests per language
English (USA)/Spanish	7
English (USA)/Burmese	1



Sample Agency Word Counts

A	B	C
O-00006	1	846
O-00007	3	3,674
O-00008	4	9,425
Total	16	25,855
Average word count per document	1,616	

Sample KPI Report

A	B	C	D	E	F	G	H	I	J	K	L	M
LUNA KPI Dashboard						All Special Conditions	All Language Groups	All Clients				
Year	Month	Week	From Date	To Date	X Actls	Late | All Lates | Early	ASAP | All ASAP | Same Day	Assign | ASAP Turn Arnd		Unfilled | All Unassigned		
2020	June	25	6/20/2020	6/26/2020	25	2 | 2 | 287	22 | 22 | 291	10 | 8		9 | 9		
					2.6%	0% | 0% | 29%	0% | 2% | 30%	Minutes		0% | 0%		
Total Jobs		Spanish	Foreign	ASL	>2hrs	Span | Burm | Other	ASL State | Reg | VRI	LUNA Miss		LUNA Save		Feedback
976		326	463	187	141	326 | 270 | 193	14 | 135 | 1	2		11		4
		33%	47%	19%	14%	33% | 28% | 20%	1% | 14% | 0%	0%		1%		0%

N	O	P	Q	R	S	T	U
	Double Book | Mileage | Travel	Model	Late	Unassigne	ASAP	No Actual	Travel
	1 | 94 | 30	976	2	0	22	25	30
	0% | 10% | 3%						
	CANCEL Early | Late | Cost						
	0 | 0 | 0						
	0% | 0% | 0%						

LUNA

SEPTEMBER 2020

Language Access Statistics

Sample Client

Types of Service Requests

Phone: 0
VRI/VI: 13
On-site: 26

39
total requests

LUNA Saves - $4,098 YTD

Your budget is on our mind! Creative coordinating strategies allow us to save you money.

Request Timing

Less than 1 hour: 12 (31%)
Less than 24 hours: 21 (54%)
Pre-scheduled: 6 (15%)

Fill Rate

Percentage of requests filled by LUNA's coordinating team

100%

Punctuality

Percent of interpreters who arrived early or on-time to an appointment

93%

13 Languages Requested

Top 5

- **ASL Virtual:** 26%
- **Spanish:** 21%
- **Burmese Falam Chin:** 15%
- **Creole:** 8%
- **Chinese Mandarin Virtual:** 8%

00:35:00

Average Turnaround Time

The average turnaround time in minutes from the time a last-minute request was called in to the time the on-site interpreter arrived

Provision and Invoicing of OPI Services

Below is a narrative of LUNA's provision and invoicing of OPI services.

1. A LUNA client expresses interest in LU37NA's OPI services.

2. LUNA's Language Services Manager sets up a CLI customer code for the new OPI client in CLI's online portal. CLI's online portal allows LUNA to configure up to four customizable columns for each client. These customizable columns instruct the CLI operators on what information to capture when a LUNA OPI client calls. LUNA's Language Services Manager customizes these four columns based upon each OPI client's specific invoicing needs.

3. A LUNA OPI client calls LUNA at 317-341-4317 or 844-777-5862.

4. A LUNA coordinator will enter into LSP Ware Atrium the OPI client's: name, date of OPI session, LEP name, and language.

5. Upon entry of the above details, LSP Ware Atrium generates a 6-digit Request Number. The LUNA coordinator assigns CLI as the interpreter for the OPI session.

6. The LUNA coordinator then connects to a CLI operator while the LUNA OPI client is on a brief hold. The CLI operator first asks for the customer code and then asks the LUNA coordinator questions in order to capture all the required for the LUNA OPI client in question.

7. The LUNA coordinator transfers the LUNA OPI client to the CLI operator who has the appropriate telephonic interpreter on the line. The CLI telephonic interpreter interprets for the LUNA client.

8. Upon completion of the OPI session, CLI's computer system automatically uploads to the CLI online portal all the session's relevant details such as: client name, LEP name, language, session start and end time, and duration in minutes.

9. LUNA invoices its OPI clients on a monthly basis. Prior to invoicing, LUNA's Accounting Department accesses CLI's online portal, enters a specific customer code, and can see the month's OPI calls for a given client.

10. LUNA's Accounting Department references CLI's online portal in order to manually update, in LSP Ware Atrium, the session start and end time for each OPI call. LSP Ware Atrium then calculates the duration and client invoice total for each OPI call. LUNA's Accounting Department uses LSP Ware Atrium to generate the OPI client's monthly invoice. Through LSP Ware Atrium, LUNA can customize OPI invoicing based upon the client's preferences. If the client so desires, a LUNA OPI invoice could include: date of OPI session, session start and end time, duration, language and LEP name. Clients can also specify that their charges for OPI services be invoiced separately from charges for onsite interpreting services.

Video Remote Interpreting vs. Virtual Interpreting

The most important distinguishing factor between Video Remote Interpreting and Virtual Interpreting comes down to one question: *Are any of the interpreting participants in the same room together?*

If yes, then Video Remote Interpreting (VRI) is the more appropriate service to request. If, however, all participants are remote, then Virtual Interpreting is the optimal solution.

VRI (when Deaf and Hearing consumers are in the same physical space):

LUNA provides reliable ASL *Video Remote Interpreting* services through a well-established web and app-based platform that offers:

- LUNA's VRI platform
- On demand services (30 second response time)
- User-friendly interfaces for requesting interpreting services
- HIPAA compliance
- By-the-minute pricing
- Transparent and streamlined tracking and invoicing of billable time
- Ideal for needs outside of business hours
- National pool of interpreters

Virtual Interpreting (when Deaf and Hearing consumers are in different remote locations):

LUNA provides virtual interpreting solutions that include the following:

- Accommodation of client's choice in video conferencing platform (Ex. Zoom, WebEx, GoToMeeting)
- Pre-scheduled appointments
- Local in-state interpreting pool (including "preferred interpreter" requests)
- Quick set-up (within 5 minutes)
- Pricing same as on-site interpreting
- Transparent and streamlined tracking and invoicing
- HIPAA compliance
- "Pin-ability" of interpreter inside platform allows easier tracking for LEP participants
- Interpreter teaming capabilities (for ASL appointments that require more than one)

LUNA's coordinating team will be able to help requestors discern which remote option is best suited for the needs of the assignment.

Chart for Onsite, Virtual Interpreting, and VRI

	On-Site	Virtual	VRI
On-demand	Yes	Yes	Yes
Pre-scheduled	Yes	Yes	No
How invoice/pay	Hourly	Hourly	Per minute
Minimum	2 hours	2 hours	No minimum
Tech requirements	No	Yes	Yes
Interpreter attire	Business casual/entity dress code	Waist-up business casual	Waist-up business casual
Confidentiality	Yes	Yes	Yes
Platform	No	Client choice	Boostlingo
Location info needed	Yes	No	No
Prep time	Yes	Yes	No
All parties in same physical room?	Yes	No	LEP and English speakers
ASL Team?	2 hr or heavy content	1.5 or heavy content	No

STANDARD PRACTICE PAPER

USE OF A CERTIFIED DEAF INTERPRETER

RID encourages use of these papers for public distribution and advocacy.

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USE OF A CERTIFIED DEAF INTERPRETER

About the CDI
A Certified Deaf Interpreter (CDI) is an individual who is deaf or hard of hearing and has been certified by the Registry of Interpreters for the Deaf as an interpreter.

Specialized training and/or experience
In addition to excellent general communication skills and general interpreter training, the CDI may also have specialized training and/or experience in use of gesture, mime, props, drawings and other tools to enhance communication.The CDI has an extensive knowledge and understanding of deafness, the deaf community, and/or Deaf culture which combined with excellent communication skills, can bring added expertise into both routine and uniquely difficult interpreting situations.

Meeting special communication challenges
A Certified Deaf Interpreter may be needed when the communication mode of a deaf consumer is so unique that it cannot be adequately accessed by interpreters who are hearing. Some such situations may involve individuals who:

- use idiosyncratic non-standard signs or gestures such as those commonly referred to as “home signs” which are unique to a family
- use a foreign sign language
- have minimal or limited communication skills
- are deaf-blind or deaf with limited vision
- use signs particular to a given region, ethnic or age group
- have characteristics reflective of Deaf Culture not familiar to hearing interpreters.

The CDI at Work

As a team member
Often a Certified Deaf Interpreter works as a team member with a certified interpreter who is hearing. In some situations, a CDI/hearing interpreter team can communicate more effectively than a hearing interpreter alone or a team of two hearing interpreters or a CDI alone. In the CDI/hearing interpreter team situation, the CDI transmits message content between a deaf consumer and a hearing interpreter; the hearing interpreter transmits message content between the CDI and a hearing consumer. While this process resembles a message relay, it is more than that. Each interpreter receives the message in one communication mode (or language), processes it linguistically and culturally, then passes it on in the appropriate communication mode. In even more challenging situations, the CDI and hearing interpreter may work together to understand a deaf individual's message, confer with each other to arrive at their best interpretation, then convey that interpretation to the hearing party.

For Deaf-Blind individuals
When a consumer who is deaf-blind is involved, the CDI may receive a speaker’s message visually, then relay it to the deaf-blind individual through the sense of touch or at close visual range. This process is not a simple relay in which the CDI sees the signs and copies them for the person who is deaf-blind. The CDI processes the message, then transmits it in the mode most easily understood by the individual who is deaf-blind.

Solo
The CDI sometimes works as the sole interpreter in a situation. In these instances, the CDI may use sign language or other communication modes that are effective with a particular deaf individual; and may use, with the hearing consumer, a combination of speech, speech reading, residual hearing, and written communication.

On the platform
The CDI sometimes functions as interpreter before an audience. This may involve the CDI watching a hearing interpreter and restating the message to the audience in a different sign mode. At

other times, the CDI may be in front of the audience to "mirror" comments or questions from a signing member of the audience so that the rest of the audience can see them.

Benefits of using a Certified Deaf Interpreter are:

- optimal understanding by all parties
- efficient use of time and resources
- clarification of linguistic and/or cultural confusion and misunderstanding(s)
- arrival at a clear conclusion in the interpreting situation.

The Association believes that when use of a Certified Deaf Interpreter (CDI) is appropriate, the CDI and a certified interpreter who is hearing can function as a highly effective team to provide quality communication access for everyone involved.

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