



## Neutral Observer Scheduling System Instructions

Below are instructions for using MWI's Neutral Observer Scheduling system. Please read this document in its entirety before using the system for the first time. Should future questions arise, you may also refer back to this document or the copy posted in the Neutral Resource Center online at:

<http://www.mwi.org/about/neutral-login>

### Instructions to access the calendar:

1. Go to <https://calendar.mwi.org/apex/FulfillmentCalendarN> and create a username and password. Retain both for your information and save this link for future access. If you ever forget your login information, you can reset them by clicking the blue "Forget Your Password?" link.
2. Log in using your new username password.
3. After logging in, you will be directed to MWI Neutral Observer Calendar.

### To view and request meeting dates:

1. When meeting dates, times and locations are received from the clients, Marcus Stergio at MWI ([mstergio@mwi.org](mailto:mstergio@mwi.org)) will notify you via email that they have been posted and provide you with a deadline by which to submit your requests.
2. To request registration, you may use either the list view or calendar view.
3. For use of the list view, click on the arrow located on the far left of the colored bar that matches your desired session. Registration options will then appear below that colored bar. Please click one of the blue "Sign Up" links that appear in the Register column on the far right of the page.
4. For use of the calendar view, click on the colored button that represents your desired session. Registration options will then appear on a new page. To complete your registration, click one of the blue "Sign Up" links that appear in the Register column on the far right of the page.
5. After registering for a session, the box/button will change from blue to black, confirming that your request has been received by Marcus Stergio. You will also receive the following message in a dialogue box: ""Thank you for submitting your request through the MWI neutral scheduling system. MWI will review this request shortly and, if accepted, you will receive a confirmation email. Have a great day!"

### Confirmation of requests:

1. Marcus will review requests within five business days of the request deadline and authorize neutrals based on a combination of criteria from the clients and MWI (who provides the most availability, evenly distributing the opportunities among all of our panellists, who is next in line for a meeting acceptance, etc.).
2. If your request has been approved, you will receive a confirmation email. Please do not reply to that email.
3. Approved neutrals' names will be posted in the Neutral column of the list view section of the scheduling system.

4. If you do not receive a confirmation email, it is because your request was not approved and has been deleted.
5. On the morning prior to your scheduled observation session, you will receive a reminder email confirming your scheduled attendance for the next day. Please do not reply to this email.

**To cancel a session due to an emergency:**

If, on the day of your session, you are unable to make the session due to an event beyond your control, please contact Marcus Stergio at 617-895-4029. If you are unable to reach him at that number or if your call is after 5:00PM ET, please reach out to him again by calling his cell phone at 617-800-6245. Marcus needs to be notified of any and all cancelations as soon as possible so that he can schedule a replacement Neutral Observer and remove you from the calendar. If your cancelation is more than 48 hours in advance, you may at that point still notify Marcus via email at [mstergio@mwi.org](mailto:mstergio@mwi.org).

**Invoicing for confirmed sessions:**

Invoices should be emailed to MWI's Operations Manager, Allison McBratney ([amcbratney@mwi.org](mailto:amcbratney@mwi.org)), within five days of the completed session and include your name, address, SS or EIN number, as well as to whom the check should be written and mailed. The invoice should also make reference to the actual number of meeting hours you participated in that day, along with the actual number of miles traveled and the amount to be billed for mileage. If you have questions about the current IRS standard mileage rate, please inquire with Marcus before submitting your invoice.

With any questions or difficulty with the system, please contact Marcus Stergio at 617-895-4029 or [mstergio@mwi.org](mailto:mstergio@mwi.org). Thank you for being a part of MWI's Neutral Observer Panel.