IMPORTANT NOTE ABOUT DRIVERS

There is a distinct and separate file as part of the RIDES module of SchedulesPlus, which identifies persons who are DRIVERS, and contains additional information for those persons. The person MUST already exist in the overall PEOPLE file to be added as a DRIVER.

ADDING / EDITING A PERSON AS A DRIVER

Click the RIDES tab, then the sub-tab DRIVERS to display a list of current drivers. *Note that this is a busy screen, and you may need to press CTRL + Minus see the full width of the panel.*

The various "date" selections are available since drivers can be active only for certain periods – but no selections are needed now. You can type into the top "Driver" entry box to select a specific person.

The Status selection defaults to "ACTIVE". Change it to "ALL" and any INACTIVE drivers will show at the bottom of the list.

There are options at the right to:

- add a new driver
- export the list to Excel
- send an email to everyone on the list

First, look at the upper left side of the panel. This shows the information from the PEOPLE database. You can click the person's highlighted name to go that person's full main file entry.

When adding a new driver, you DO need to go to that record, click EDIT and then enter the person's BIRTHDATE at the far right. *Again, you may need to press CTRL + Minus to see the full width of the panel.* This is the only place where the birth date is stored or available to edit!

Change the status to INACTIVE if the driver is unavailable for an extended time – such as "away for the summer" and they will not be suggested for rides. Make them ACTIVE again when appropriate.

Open the secondary tab "Days Off" next to "Update Driver" to enter any individual dates when the driver is unavailable, instead of making them INACTIVE then ACTIVE for short time periods.

Three is a NOTES entry section for placement of what are termed "Comments" on the current Driver Master Sheet.

The base software allows for the definition of multiple RIDE categories, but we only take rides for medically related, trips - thus we only use the MED code. If there were multiple categories defined in our system, you could select on only those category(s) this driver would take. Just leave it at "No restrictions".

It also possible to "block' certain rider(s) from using this driver. Click "Add a blocked rider" to select a person form the PEOPLE file to be blocked her. You can add multiple persons, or delete indicated persons already blocked.

Under KEY DATES, we enter Driver's License Expiration Date and Insurance Expiration Date.

> Note that back on the main listing of all drivers, expired License or Insurance date are highlighted in RED. When we create a ride and manually assign the driver, such drivers are shown as "not eligible".

Enter our coded indication of Insurance Limits in the Policy Number field.

DRIVER AVAILABLE DATES/TIMES

The panel at the right controls when the driver IS AVAILABLE for a ride.

A black box indicates "available" to drive

In this example, we clicked the "Check Day" box for Monday, forcing all times "on" for the day. *The "Check Day" box toggles all times on or off for that day*

Tuesday this driver works 9 am to 4 pm
Wednesday, some afternoon times
Thursday, some morning times
Friday, an unlikely mix of "early" and "late"

Saturday and Sunday, not at all

AVAILABILITY

Time	M	T	W	R	F	Sa	Su
Check Day	■	☐	☐	☐	☐	☐	☐
7–8am	■	☐	☐	☐	■	☐	☐
8–9am	■	☐	☐	■	■	☐	☐
9–10am	■	■	☐	■	■	☐	☐
10–11am	■	■	☐	■	☐	☐	☐
11–Noon	■	■	☐	■	☐	☐	☐
12–1pm	■	■	■	☐	☐	☐	☐
1–2pm	■	■	■	☐	☐	☐	☐
2–3pm	■	■	■	☐	☐	☐	☐
3–4pm	■	■	■	☐	■	☐	☐
4–5pm	■	☐	■	☐	■	☐	☐
5–6pm	■	☐	☐	☐	■	☐	☐

DRIVER MODULE OPTIONS

SchedulesPlus has a "Driver Module" available for use by authorized drivers (some may choose not to make use). Using a computer , tablet or smart phone, the driver can see their own scheduled rides (with mapping options). We may also allow them to see a calendar of ALL rides, and ultimately the ability to accept rides that have not yet been assigned a driver.

We have every many decisions to make with regard to how rides are assigned to drivers. This merely indicates a possible scenario.

The bottom of the main panel indicates the URL (web address) for the driver to access the module. http://schedulesplus.com/karebears/driver If they are authorized, they would sign in with their phone number and a password. *NOTE: They are NOT signing in to full access to SchedulesPlus, only to the limited Driver Module!*

The "Driver Logon" entry will show the "… is Authorized …" indication if that is the case, otherwise it will show "—No Access—". This setting can only be done (the UDATE button) by the SchedulesPlus software "owner" (Mark). Thus when adding a new driver, a request must be made to Mark.

Two further options can be set, affecting drivers authorized to the module:

- Can the driver "Sign Up" (accept) an unassigned ride (from the calendar)?
- Can the driver remove themselves from a ride (making it "Unassigned")?

Our further planning will determine how/who we authorize and set these options.

Somewhat misplaced, it is possible to indicate the maximum mileage for acceptance.

The last two entries affect how the driver's volunteering time is recorded. **To be determined**.

SOME ITEMS FOR INVESTIGATION

- How do we create the "Call Log" information currently entered on the Driver Master sheet? I believe there is a method, but perhaps not as straightforward as would be ideal
- Create a separate document describing the Driver Module appearance and functionality
- How to display the "Notice Required" specification for a driver