PLEASE DISREGARD THE PREVIOUS VERSION OF THIS DOCUMENT DATED JULY 18

INTRODUCTION

A previous document PROCEDURE - PROCESSING A RIDE REQUEST discusses how requests for Rides are initially entered into the system. However once entered, we must manage those Rides in the system during the initial period of driver assignment and notification to the rider. Once those steps are done, the Ride sits in the system awaiting completion, just as the current paper Transportation Request form remains in the binder.

USING THE "ENTERED" DESIGNATION

There is an entry on the SchedulesPlus Ride entry screen named "Category/Purpose" which the developer intended for the selection of various reasons for the ride – medical appointments, shopping, transport to clubhouse – anything the organization would choose to provide. Of course, we only provide rides for medical appointments. Thus we removed all defined codes there other than MEDICAL.

But as a method of identifying rides in the system while in the initial phase, we will also have one other category/purpose code of ENTERED. All rides should be initially created with ENTERED as that indication. The following instructions will show how the indication is used.

DRIVER ASSIGNMENT

Once entered, a new Ride request awaits assignment to a driver. Under this new process, the office staff will NOT make phone calls to arrange for a driver.

The system provides the drivers with a "Driver Module" – we call it the "Driver Portal"- with full visibility to "unassigned" rides, as well as to any Rides which become assigned to them.

This is an example of what the drivers see for a given Ride:

	Ride#	When	Rider	PickUp	DropOff	~Miles 1-way	Ended	Miles (L/UN)	Odom	Units	Fee	Driver Hrs
1	2516170	11:00am Appt: 12:00pm Unassigned	Jeff Pelletier SIGNUP	15383 W Cheery Lynn Rd Goodyear AZ 85395 MAP NAVIGATE	Abrazo West Campus 13677 W McDowell Rd Goodyear AZ 85395	4		L:4		2		
			(623) 555-1212 **Accom: MOB,WC**		NOTE: O2							

The drivers can also see a calendar of all "unassigned" Rides, which they can accept using the SIGNUP button seen in the example

THIS IS A MAJOR CHANGE TO OUR ASSIGNMENT PROCESS

Our process will now RELY on the drivers to:

- access the Driver Portal on a fixed schedule (perhaps Noon and 3 PM to coincide with the end of the office shifts?)
- use the Portal to "Sign Up" for Rides they agree to handle
- call the rider now to advise them that they are the driver, perhaps also the day before
- when the Ride is done, use the "COMPLETE" function in the Portal to mark it "Complete", and report their mileage to the system

Under the existing method, the resident was advised by the office staff - as soon as a driver was arranged by phone calls. That advice was often made during the same office shift which took the request. That will not be possible now. Rides will await driver sign up, and/or follow up by the next office shift — likely a minimum of 12-24 hours elapsed time since entry of the request.

SUGGESTED METHOD OF MANAGING RIDES

Accessing the RIDES tab provides a listing of rides currently in the system. The display initially defaults to show only Rides scheduled for "today." It will be more helpful to use the JUL 2024 (current month) or "<< MONTH" and MONTH>>" buttons to display a more meaningful list.

This shows how the date range changed after selecting the JUL 2024 button. Of course the list of Rides also displayed changes to reflect the new selection

MONITORING AND MANAGING RIDES INDICATED AS "ENTERED"

At the start of a new office shift, we wish to monitor Rides which have been <u>recently entered</u> in the system, indicated with Category/Purpose = ENTERED

In the selection box labelled Category/Purpose select ENTERED; the display refreshes

There can be two situations with these recently entered Rides:

1. Since the entry of the Ride, some driver has accepted it, as shown in the third and fourth examples. Note that the Status in the Date column has changed to "Assigned"

2. Since the entry of the Ride, NO driver has accepted it, as shown in the first and second examples, showing "-Driver-"

FOR RIDES WHICH NOW HAVE A DRIVER ASSIGNED

1. Click the RIDER name to display the original full Ride entry screen

2. Change the Category/Purpose entry to MEDICAL – which is the real purpose of the Ride

3. Yet to be decided is whether the office volunteer will contact the rider in any manner. Remember that we will now expect the DRIVER to make that contact

FOR RIDES WHICH STILL DO NOT HAVE A DRIVER ASSIGNED:

- These Rides need attention. We will <u>need to establish parameters</u> for staff to decide whether:
  - Leave the indication as ENTERED and wait longer for some driver to accept the Ride - perhaps considering how far out the scheduled date is. By remaining in ENTERED status, this Ride would then continue to be evaluated in each such review cycle,   OR
  - Staff must proactively arrange a driver, likely by reverting to calling drivers directly

Note that these reviews could also be performed throughout a shift, it deemed appropriate

ALTERNATIVE TO VIEWING BY "ENTERED"

It is also possible to view all "unassigned" Rides by using the "Status" selection box with selection set to DRIVER NEEDED, rather than the "Category/Purpose" selection box set to ENTERED.

However all "unassigned "Rides would be then listed by ride schedule date, thus making it a little harder to focus on the Rides which were "recently entered"

The system provides some assistance in selecting drivers to call.

Click the DRIVER dropdown for the Ride entry in question

The system presents a list of AVAILABLE drivers, whose day and time parameters are a match for this Ride's day and time

There are the best drivers to be called

- Realizing though, they may already have evaluated the Ride in their Portal, and determined that they could not accept it

Drivers listed further down as CONFLICTS do NOT match for this Ride's day and time. *However, the system WILL allow them to be selected*

When a driver is identified:

- click their name here to set them as the assigned driver
- change the status on the entry from UNASSIGNED to ASSIGNED
- Click the rider's name, to display the original entry screen
- Change the Category/Purpose to MEDICAL – the true purpose of the Ride

OTHER POSSIBLE REVISIONS WHICH CAN BE MADE TO RIDE ENTRIES

Of course, the rider could call to CANCEL the Ride, or we could even subsequently DENY the Ride. *Note the STATUS CODES available for these and some other events.*

Also, at any time it is actually possible to click on the RIDER NAME to bring up the original entry screen. Virtually ANY specification of the Ride can be changed – but of course that could have substantial effect on preparations already in process! For substantial changes, it may be best to cancel this Ride and re-enter it as new.

COMPLETING THE RIDE

Drivers now have the capability in the Portal to mark the Ride as COMPLETE, and to post their mileage – without needing to call in to the office. We expect them to do so on the Portal.

However the office staff can indeed mark the Ride as COMPLETE and post the mileage, such as if advised by a call from the driver.

UNASSIGNING A DRIVER

We can choose to allow the drivers to "unassign" themselves through the Portal, or we can decide not give them that option. (For current testing, they do have a REMOVE button.)

It would seem better that we always require them to call the office. For if they made the change, although the Ride entry in the system would change to UNASSIGNED, how would staff know to look for that having happened, and to react? It could easily be missed and left unaddressed. *To be determined*

RIDER NOTIFICATION

Earlier we mentioned that we would now expect the drivers to call and advise the rider themselves, rather than coming from the office. We could of course, continue to make that notification from the office instead. If so, this would be done at step 3 of "FOR RIDES WHICH NOW HAVE A DRIVER ASSIGNED" We will be investigating whether an email could be sent.

WEEKLY REMINDER

The system has the capability to send a reminder email (on Saturday night) directly to each rider scheduled for a Ride over the next seven days. *Note that we must explicitly mark each rider's PEOPLE record (one time) to receive such messages when appropriate.*

However this would not be useful for Rides which are both entered and scheduled within a Monday through Friday time span. Again, we will investigate whether there is a way to proactively send a confirming email to the rider by the office.