

Click the RIDES tab

Click on ADD RIDE

SEARCH FOR THE RIDER

The screenshot shows the top navigation menu with tabs: Account, Home, People, Groups, Resources, Calendar, Financials, Reporting, POS, Rides, and More.. The 'Rides' tab is selected. Below the navigation menu are several sub-menus: 'Assign by Driver' (with sub-items: Assign by Vehicle, Rides List by Driver, Drivers, Log Payments, Reports, Setup), 'Rides by Date' (with sub-items: Working, Rides Calendar, Vehicle Calendar, Vehicles, Ride Notes), and 'Add Rider'. A search bar is visible with the text 'roh|' entered. To the right of the search bar are 'Search' and 'Cancel' buttons, followed by the text '-- SEARCH FOR A PERSON TO ADD --'.

IF THE PERSON IS NOT IN OUR FILE

- Click the ADD NEW CONTACT button on the fare right of the screen
- Follow the process to add a new contact
- Then that person is available to select in the yellow SEARCH box

SPECIFY ADD ONE RIDE FOR THE SELECTED RIDER

The screenshot shows the same navigation menu as above. The search bar now contains 'roh|' and the 'Search' button is highlighted. Below the search bar, a table displays the search results for the rider. The table has columns for Last Name, First, and Telephone. The results show a rider named Rohleder, Otto, with the telephone number (623) 536-1590. To the left of the table are two buttons: 'Add One Ride' and 'Add Multiple Rides'.

Last Name	First	Telephone
Rohleder	Otto	(623) 536-1590

*Note: Repeating rides are not discussed in this document*

REVIEW THE RIDER'S ACCOMMODATION SETTINGS

Check the Accommodations listed next to the phone number. These are brought in from the person's master record. Confirm any accommodations with the rider and click their name to access their master record if needed to add or change accommodations there.

## ENTER DATE, PICKUP TIME, APPOINTMENT TIME, DURATION

**SAVE** **CANCEL** **ADD A NEW RIDE** **VIEW FINANCIALS** **HELP/INFO**

Name: **Otto Rohleder** (623) 536-1590 (Accom: C,HOH)  
Address: 14973 W Robson Cir N, Goodyear, AZ 85395-8864 alba2001@cox.net

Date/Time: 06/03/20: 10:00 am Duration: 1.0 (hrs) Repeats: Does not repeat ▾

Appt Time: 11:00 am

Starting Location: 14973 W Robson Cir N Goodyear AZ 85395-8864 ▾

Destination: 14541 W Indian School Rd Goodyear AZ 85395 (✓) × ▾

Add Return Leg?  WILL CALL for return ride? No ▾

## IGNORE THE "DOES NOT REPEAT" SETTING

## PICKUP LOCATION DEFAULTS TO RESIDENT'S HOME ADDRESS

## BEGIN TO ENTER A DESTINATION

The system first lists the most recent destination used for this person (if any have previously occurred) as well as all other previous destinations for this person (shown when you click the "down" arrow on the destinations box). If any of those are to be used for this ride, click the appropriate entry.

Otherwise, start typing of any value – a facility/practice name, the beginning of a street address (number) and the system will begin suggesting locations already existing in the system. (All previous destinations for any person are retained in this listing). For example, typing "abrazo" the system finds an on-file address for Abrazo West Campus. If the desired destination is found in this manner, click that entry.

**SAVE** **CANCEL** **ADD A NEW RIDE**

Name: **Otto Rohleder** (623) 536-1590 (Accom: C,HOH)  
Address: 14973 W Robson Cir N, Goodyear, AZ 85395-8864 alba2001@cox.net

Date/Time: 06/03/20: 10:00 am Duration: 1.0 (hrs) Repeats: Does not repeat  
Appt Time: 11:00 am

Starting Location: Type in any part of the address to search existing locations...  
-----> ADD THIS NEW STARTING LOCATION:  
14973 W Robson Cir N, Goodyear, AZ 85395-8864 **Clear**

Destination: Type in any part of the address to search existing locations...  
Add Return Leg? abrazo

Category/Purpose: -- ALL OTHER DESTINATIONS --  
**Abrazo West Campus 13677 W McDowell Rd Goodyear AZ 85395 (✓)**

Driver: --FIRST DRIVERS TO CONSIDER--

The selected destination is placed in the current Destination box.

**SAVE** **CANCEL** **ADD A NEW RIDE**

Name: **Otto Rohleder** (623) 536-1590 (Accom: C,HOH)  
Address: 14973 W Robson Cir N, Goodyear, AZ 85395-8864 alba2001@cox.net

Date/Time: 06/03/20: 10:00 am Duration: 1.0 (hrs) Repeats: Does not repeat  
Appt Time: 11:00 am

Starting Location: Type in any part of the address to search existing locations...  
-----> ADD THIS NEW STARTING LOCATION:  
14973 W Robson Cir N, Goodyear, AZ 85395-8864 **Clear**

Destination: **Abrazo West Campus 13677 W McDowell Rd Goodyear AZ 85395 (✓)**

Add Return Leg? **WILL CALL for return ride? No**

TO CREATE A NEW DESTINATION, (NOT CURRENTLY IN THE SYSTEM)

**SAVE** **CANCEL** **ADD A NEW RIDE** **VIEW FINANCIALS** **HELP/INFO**

Name: **Otto Rohleder** (623) 536-1590 (Accom: C,HOH)  
Address: 14973 W Robson Cir N, Goodyear, AZ 85395-8864 alba2001@cox.net

Date/Time: 06/03/20: 10:00 am Duration: 1.0 (hrs) Repeats: Does not repeat  
Appt Time: 11:00 am

Starting Location: 14973 W Robson Cir N Goodyear AZ 85395-8864

Destination: Type in any part of the address to search existing locations...  
Add Return Leg? Create

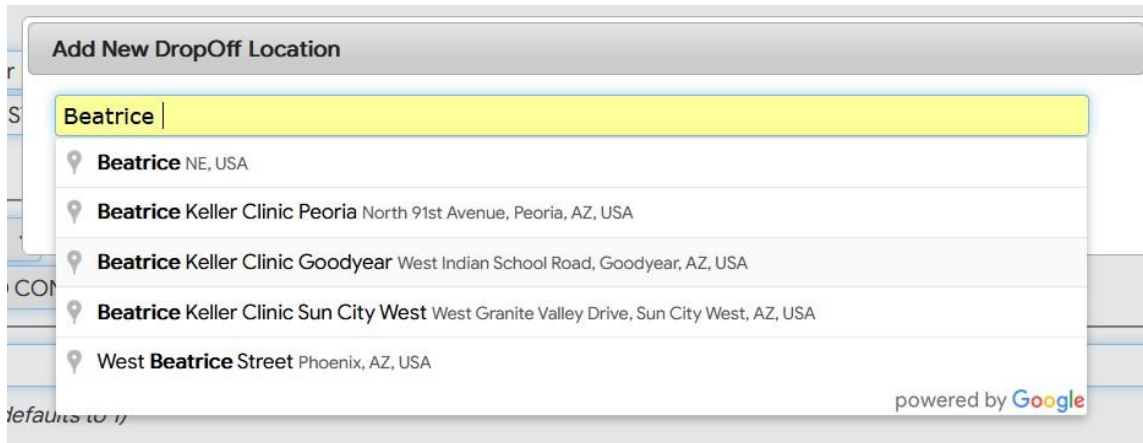
Category/Purpose: -- **CREATE NEW DESTINATION** --

Driver: --FIRST DRIVERS TO CONSIDER--

Clear any existing destination information and type "Create" to get the "Create" button

Click the long CREATE NEW DESTINATION button

In the resulting "Add New Drop Off Location" box, begin to type information and Google will start to make suggestions. This NOT from the system list of previous destinations. It is Google doing a full internet search based on your entry.



Google will most likely find a "business" name, such as "Beatice" as shown, or also find a street address if you begin with a an address number.

CLICK ON THE DESIRED LOCATION TO ACCEPTS

Ignore "ADD RETURN LEG"

Change "WILL CALL FOR RETURN RIDE" to "YES" only if the rider is to call the driver by phone when they are ready for the return trip

In the CATEGORY/PURPOSE box  
Select "ENTERED"

This usage will be explained later

## DRIVER SELECTION

Do NOT make any selection in the "Driver" selection box.

We will NOT be calling drivers to arrange their Rides

Drivers have a separate DRIVER MODULE APP.

Using that APP they can view all available Rides, and "sign up" to accept and handle that Ride.

Ignore PASSENGER TYPE, if present. This capability is being reviewed for usefulness.

If provided by the rider, enter the doctor/practice name and phone number in the NOTES field. This information will be presented to the driver in the Driver Module.

Notes:	<input type="text" value="Dr. Pepper 623-555-1212"/>
Units:	<input type="text" value="2"/> (If left blank, defaults to 1)
Fee for this ride:	<input type="text"/>

Leave UNITS as "1"

## SAVE THE RIDE TO FINALIZE IT AS "ENTERED"

<input type="button" value="SAVE"/>	<input type="button" value="CANCEL"/>	<input type="button" value="ADD A NEW RIDE"/>
Name:	<input type="text" value="Otto Rohleder"/>	(623) 536-1590 (Accom: C.HOH)
Address:	<input type="text" value="14973 W Robson Cir N, Goodyear, AZ 85395-8864"/>	<input type="text" value="alba2001@cox.net"/>
Date/Time:	<input type="text" value="06/03/20"/> <input type="text" value="10:00 am"/> Duration: 1.0 (hrs)	Repeats: <input type="text" value="Does not repeat"/>
Appt Time:	<input type="text" value="11:00 am"/>	
Starting Location:	<input type="text" value="Type in any part of the address to search existing locations..."/> -----> ADD THIS NEW STARTING LOCATION: <input type="text" value="14973 W Robson Cir N, Goodyear, AZ 85395-8864"/> <input type="button" value="Clear"/>	
Destination:	<input type="text" value="Abrazo West Campus 13677 W McDowell Rd Goodyear AZ 85395 (✓)"/>	
Add Return Leg?	<input type="text"/>	WILL CALL for return ride? <input type="text" value="No"/>
Category/Purpose:	<input type="text" value="MED - Medical Ride"/>	
Driver:	<input type="text" value="--FIRST DRIVERS TO CONSIDER--"/>	

Notes:	Dr. Pepper 623-555-1212
Units:	2 (If left blank, defaults to 1)
Fee for this ride:	

*Note: this graphic shows the Category/Purpose as "MED" but we will use "ENTERED"*

## RIDE AS THEN SHOWN IN THE ADMIN SYSTEM

Rides by Date | Working | Rides Calendar | Vehicle Calendar | Vehicles | Ride Notes | # Rides shown: 1

Specific Ride Id: 2545968

Return Leg: All Rides - no filter

Accommodation(s): All Rides - no filter

Group: --Not applicable--

Rider: --RIDERS IN RANGE (2)

Driver: ALL DRIVERS IN RANGE

ADD RIDE

SAVE CHANGES | EXPORT | PRINT | EMAIL | RideMAPPER | ROUTE SHEETS | REFRESH

(\*\*) by rider name/ride has internal notes

AI? <input checked="" type="checkbox"/>	Date	Time	SEQ	RIDER EMAIL	DRIVER EMAIL	PickUp Location	DropOff	Est Miles	Actual Miles	Odom	ApprTime ActualEnd	Units	Driver Hrs	
1	#2545968	9:00am	1	Pelletier, Tim	..Driver..	HOME 15744 W Fairmount Ave Goodyear AZ 85395-8769	Banner Estrella Medical Center 9201 W Thomas Rd Phoenix AZ 85037	11	11	0	start end	10:00am End	2	

Purpose: MED C:847,251-2864 Account: Q2:WC Note: Dr. Pepper 623-555-1212

## SUBSEQUENT PROCESSING

**A separate document "MANAGING RIDES IN THE ADMIN SYSTEM" will discuss how the office reviews and manages Rides after this initial entry.**