

SCRIPT FOR BOOKING A RIDE

1. Click RIDES tab, to open RIDES BY DRIVER display
2. Click ADD A RIDE (yellow button at right)
3. Enter rider name in yellow SEARCH, click SEARCH (note 1)
 - a. If the person is not found, click ADD NEW CONTACT button
 - b. See script below for that process
4. Click ADD ONE RIDE for the person from search matches (note 2)
5. View the person's Accommodations entry at right
6. Review all accommodations with rider
7. If any are to be added for the person, click the rider's name
 - a. On the person's record. Click EDIT
 - b. Specify any appropriate accommodations (note 5)
 - c. Return to ADD A RIDE (browser BACK button)
8. Enter appointment date (click field for a calendar)
9. Enter the Pickup time (click field for list or type such as "9a" to position)
10. Enter the Appointment time (same method as for Pickup)
11. Review appointment length, change default of 1 hour as needed
12. Ignore DOES NOT REPEAT (note 2)
13. Confirm starting location (defaults to the person's home)
 - a. Click the down arrow at right to see person's start locations
 - b. Can be changed if needed, same as in step 14 for destination)
14. Begin to enter destination
 - a. Person's most recent destination is shown
 - b. Click down arrow to see all the person's common destinations
 - i. Click on an appropriate destination if shown
 - c. Or begin to type a anew ride destination information (address, practice name or doctor name (note 3) (this is from the systems list of all known locations)
 - i. If the appropriate destination is found, click it
 - ii. Otherwise, type "create" in the destination field
 1. Click CREATE NEW DESTINATION from a Google search
 2. Begin typing the address, business or doctor name
 3. Click on appropriate destination when found - which will show as
NEW DESTINATION TO ADD
15. Ignore "Add Return Leg" and "Will Call"
16. Select ENTERED as the category/purpose
17. Ignore DRIVER field for now
18. Enter Doctor/Provider name and/or phone number in NOTES (note 6)
19. Lease Units a 1
20. Review, then click SAVE

Note 1: the more of the rider's name you type, the more it will narrow in on a single person

Note 2: see separate SUB-SCRIPT for Repeating rides (not yet created)

Note 3: we will need to develop a policy on how we create locations – how do we incorporate the doctor/provider name, the business/practice name. the address. It might be acceptable to list a given location in multiple ways. The system will look for a match in the location records based on any information keyed in the search box

Note 4: the system retains EVERY location ever used for ANY rider

Note 5: the accommodations listed in the person's record are copied into every Ride

Note 6: the doctor/provider name and/or phone number are displayed to the driver

SUB-SCRIPT FOR "ADD A NEW CONTACT"

1. Enter required First name, Last name, phone number
 - a. Ask if the number is for a Cell phone
 - b. if so, select type "CELL", otherwise select type "HOME"
2. Begin to enter their address
 - a. Use the shaded "Look Up Address using Google" line
 - i. Google will suggest addresses as you type more information
 - ii. Google formats the addresses in a standardized way
 - iii. Click on the suggestion, which will fill in the address, city state and ZIP fields
 - b. Otherwise, key in the address, city state and ZIP
3. Enter an email address – required!

Ignore the Birthdate entry – we do not capture this information