

## SCRIPT FOR BOOKING A RIDE

Note: Revisions in **RED** as of April 2025

1. Click RIDES tab, to open ASSIGN BY DRIVER, RIDES BY DATE 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
5. View the person's Accommodations entry at right (Note 3)
6. Review all accommodations with rider
7. If any accommodations are to be added for the person, click the rider's name
  - a. On the person's record. Click EDIT - **then click the DEMOGRAPHICS tab**
  - b. Specify any appropriate accommodations – **then click SAVE**
  - c. Return to ADD A RIDE (use the browser BACK button)
8. Enter the Pickup Date (Click there to bring up a calendar for selection)
9. Enter the Pickup Time (click there for list of times, or you can type in such as "9a")
10. Review appointment Duration, change default of 1 hour as needed
11. **Enter the Appointment time (click there for list of times, or you can type in such as "9a")**
  - a. **Note that the entry field still shows "optional" in gray. This wording cannot be removed.**
  - b. **However, for Kare Bears, an Appointment Date is now required by the software !**
  - c. **Clicking SAVE without an Appointment date entered will show an error message ("ACTION: APPT TIME is required") and the Ride cannot be saved [completed]**
12. Ignore DOES NOT REPEAT
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 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 new ride destination information (address only)
  - d. To check from the system list of all known locations (note 2)
    - 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 MEDICAL as the category/purpose
17. Ignore DRIVER and PASSENGER TYPE fields
18. Enter Doctor/Provider name and/or phone number in NOTES
19. Leave Units as 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:** the system retains EVERY location ever used for ANY rider

**Note 3:** the accommodations listed in the person's record are copied into every Ride

### **SUB-SCRIPT FOR "ADD A NEW CONTACT" FROM THE PEOPLE TAB**

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