ROUTEMATCH DEMAND RESPONSE RM 6 USER'S GUIDES

Trips User's Guide

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RouteMatch Software™

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CHAPTER 1

Trips Module Overview

The Trips module allows your agency's call-takers (or other staff) to create and manage your customers' trips. RouteMatch uses these trip records to create schedules and perform other tasks, so it is important that they are configured correctly. Typically, the customer contacts your agency to book a ride and explains the requirements for their trip. This usually includes their intended destination, what time they want to take the trip, and several other relevant pieces of information. The call-taker then configures a trip record for the customer that best suits their needs.

Be aware that a trip constitutes one pickup and one drop-off only. This means that you must create multiple trips for a customer if they need to return home, or travel to more than one place.

Example

Mr. Smith calls your agency. He needs to visit his doctor, stop off at the pharmacy, and then return home. This requires the scheduling of three separate trips. First, the call-taker would need to create a new trip that takes Mr. Smith from his home to the doctor. Then, there needs to be another trip to take him from the doctor to the pharmacy. Finally, a third trip must be created to take Mr. Smith from the pharmacy back to his home.

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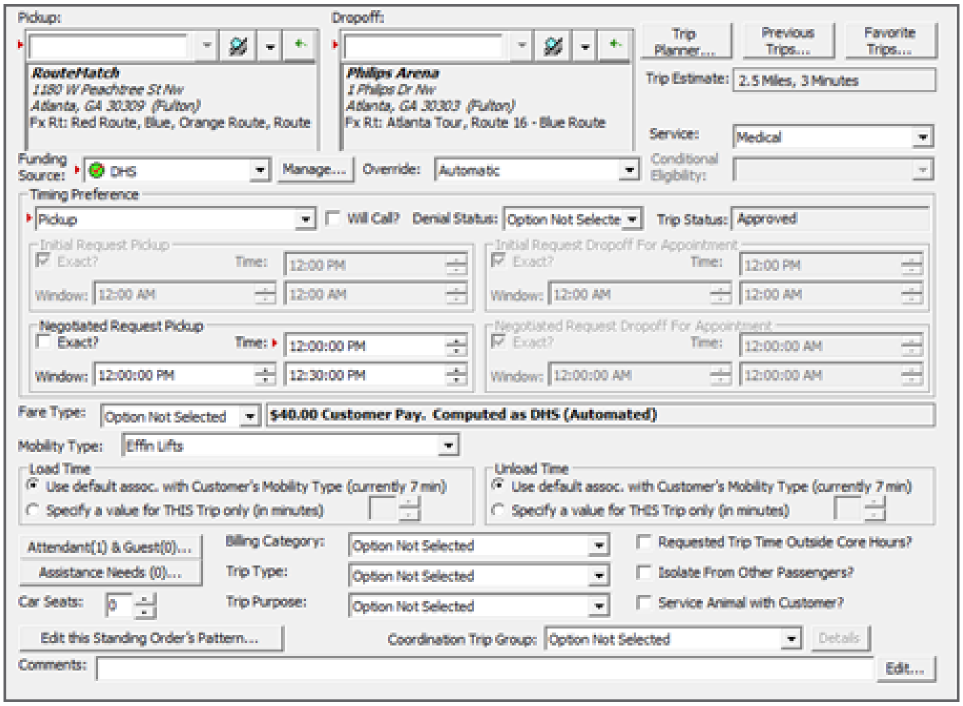
Creating a New Trip

This section fully explains the process of creating a new trip. When the customer requests their trip (typically over the phone), you must determine their transportation needs and enter all of their relevant information in the Trips module. The majority of the fields on the trip creation screen are optional, so what you record here depends on the customer's requirements and your agency's policies.



How to Create a New Trip

1. You first need to locate and select the appropriate customer by browsing the list on the left side of the screen, or by using the search bar at the top. If using the search, you can select which criteria to use from the drop-down menu next to the search bar. For example, if a customer's name is not specific enough to find them (there might be multiple customers with the same name), you may want to use their social security number instead.

2. Select the Date of the customer's trip on the calendar. Please confirm it is correct to avoid creating the customer's trip on the wrong day. The date selected affects the number of trips the customer can take per week (if there is a limit) as well as their billing. The calendar displays the following items:

» The date you select is highlighted in gray.

- Today's date is circled in red.
- Dates that contain existing trips are bold.

3. Click the New button.
4. You should now complete all of the trip's required fields, which are indicated with a red arrow. First, select the addresses for the customer's pickup and drop-off. The customer's home address automatically displays in both fields, but you can change it to any GeoCoded address by completing a search. Notice that the system automatically calculates the trip's potential length (miles and minutes) in the Trip Estimate field.

Note:

If the address you are looking for does not exist in the system, you may need to open the Addresses module and GeoCode it. Refer to the Addresses module's guide for more information.

5. Select a Funding Source for the customer’s trip, which the system uses to calculate the trip's cost. If the funding source you need is not in the list, click the Manage... button and select a funding source in the Customer Eligibility window. A customer's eligible funding sources are determined by your agency in the Customers module. Each funding source in the drop-down box has a symbol next to it:

- A green circle with a red check mark () indicates that the funding source is currently applicable.
- A yellow triangle with a red exclamation mark () indicates that the Standing Order's number of trips will exceed the customer's number of allowed trips, or the funding source will expire on a future date. This applies to Standing Orders only.
- A red circle with a white X () indicates that the funding source has expired.

Note:

Your agency may configure RouteMatch’s settings to not allow you to book a customer’s trip if their funding source is expired.

6. Choose a Timing Preference for the trip depending on whether the pickup or drop-off is more important to the customer. There are five preferences to choose from:

- Drop-off – The customer has a specific time when they need to be dropped off but their pickup time is flexible. For example, the customer needs to be dropped off at work in time to start their shift.

- Pickup – The customer has a specific time when they need to be picked up but their drop-off time is flexible. For example, the customer needs to be picked up at work right when their shift ends.
- Pickup With Drop-off at Appointment Time – The customer has a specific time when they need to be picked up and dropped off in order to make an appointment. For example, the customer needs to be picked up at work right when their shift ends and they need to be dropped off at the doctor in time for their appointment. This option only applies to agencies that utilize the RouteMatch Scheduling Engine because it sets restrictions on the system's automatic scheduling functionality. Use this option only when it is necessary as the extra requirements give RSE fewer options for scheduling the trip.
- Drop-off Computing Pickup Time – Select this preference when negotiating trip times to define the customer's desired drop-off time and have RouteMatch automatically calculate their pickup time. You must save the trip and perform Show Recommendations to fully utilize this functionality. This option provides the customer with more information, but the extra requirements give RSE fewer options for scheduling the trip. It may not be available if it is not configured for the selected service.
- Pickup Computing Drop-off Time – Select this preference when negotiating trip times to define the customer's desired pickup time and have RouteMatch automatically calculate their drop-off time. You must save the trip and perform Show Recommendations to fully utilize this functionality. This option provides the customer with more information, but the extra requirements give RSE fewer options for scheduling the trip. It may not be available if it is not configured for the selected service.

7. Enter the customer's desired pickup and/or drop-off time according to the option you selected in the previous step. The system then automatically calculates a window of time within which the customer can be picked up or dropped off. This window is defined by your agency, so changing its value is not recommended.

> **Note:** Note
>
> If your agency negotiates trip times with customers, please refer to the Negotiating Trip Requests section below (page " Negotiating Trip Requests" on page 18).

8. If the customer requires their pickup or drop-off to occur at an exact time, you can check the Exact? Checkbox to remove the time window option. You should confirm that your agency's operations allow for this kind of trip configuration.

9. Complete all relevant optional fields. Keep in mind that a field may be optional in RouteMatch, but required by your agency. Each of these fields are explained in depth in the next section (page 1).
10. Enter information into the Appointment and Custom Fields tabs according to your agency's requirements and setup. These tabs are explained further below (page " Appointments Tab" on page 15).
11. Click the Save button on the tool bar and select an option from the drop-down menu to save the trip. The available options are defined later in the Trip Saving Options section (page " Trip Saving Options" on page 16).

Example

Jack McCoy calls your agency to request a new trip for Monday morning. In the Trips module, the call-taker locates Mr. McCoy's record, selects the appropriate date on the calendar, and then clicks the New button. Jack needs to be picked up at home and dropped off at his doctor's office so the call-taker enters the corresponding addresses.

The call-taker determines which funding source Jack is using for his trip and then inquires about his timing preference. For this example, Jack needs to arrive at his doctor's office on time so he would favor a drop-off timing preference. The call-taker asks Jack what time he needs to be dropped off and configures the trip accordingly. Jack also has the following requirements, which the call-taker should note for the trip:

Jack is able to walk without aid, so he has the Ambulatory mobility type.

He is bringing a friend with him on the trip and this guest should be noted.

Jack wants a ride back home after his appointment, so the call-taker should also create a return trip for him.

Optional Fields

Address the optional fields below according to your agency's policies and setup. Also, take into account the customer's needs to determine which fields are necessary when creating a trip. For instance, a customer's mobility type is usually important to note as they may require certain vehicle accommodations. Your agency might also require this information for reporting purposes. This section fully defines each of the optional fields and explains their typical use.

Field	Description

Service	Select which of your agency's services the customer is using for this trip from the drop-down menu. Agencies generally offer multiple services, which have differing characteristics and settings configured in the Services module. These settings are then applied to the trip when you select its service. If a customer has a default service designated on their record, it is automatically selected when you click the New button.
Conditional Eligibility	Some agencies require their customers to meet certain conditions in order to take demand response trips. For instance, an agency may not offer demand response rides until after dark. These conditions are configured for each customer’s funding sources. This field is greyed out unless the selected funding source requires a conditional eligibility. If this is a requirement, a pop-up alert displays when you click the new trip button.
Override	Select a billing override from the drop-down menu. This allows you to specify a pre-configured trip cost according to the override's associated billing rule. Note that this field may be required for the selected funding source. If you do not select an override when this is the case, the billing rule will not apply to the trip.
Will Call?	Check this box if the customer plans to call your agency when they are ready to take their trip. Will call trips are typically not scheduled ahead of time. Instead, the dispatcher schedules them the day of, once the customer calls and says they are ready. If you deny the customer their trip, use this field to note the reason why. You may need to deny a customer's trip request from time to time for certain reasons. For example, your agency's vehicles could be over capacity on the day the customer wants to take their trip.
Fare Type	Indicate how the customer is going to pay for their trip. The system also uses this fare type to compute how much the customer owes for the trip.
Mobility Type	Record the customer’s maneuverability, including if they use a wheelchair, walker, etc. Each mobility type is also assigned a default load and unload time, which RSE takes into account when scheduling the trip.

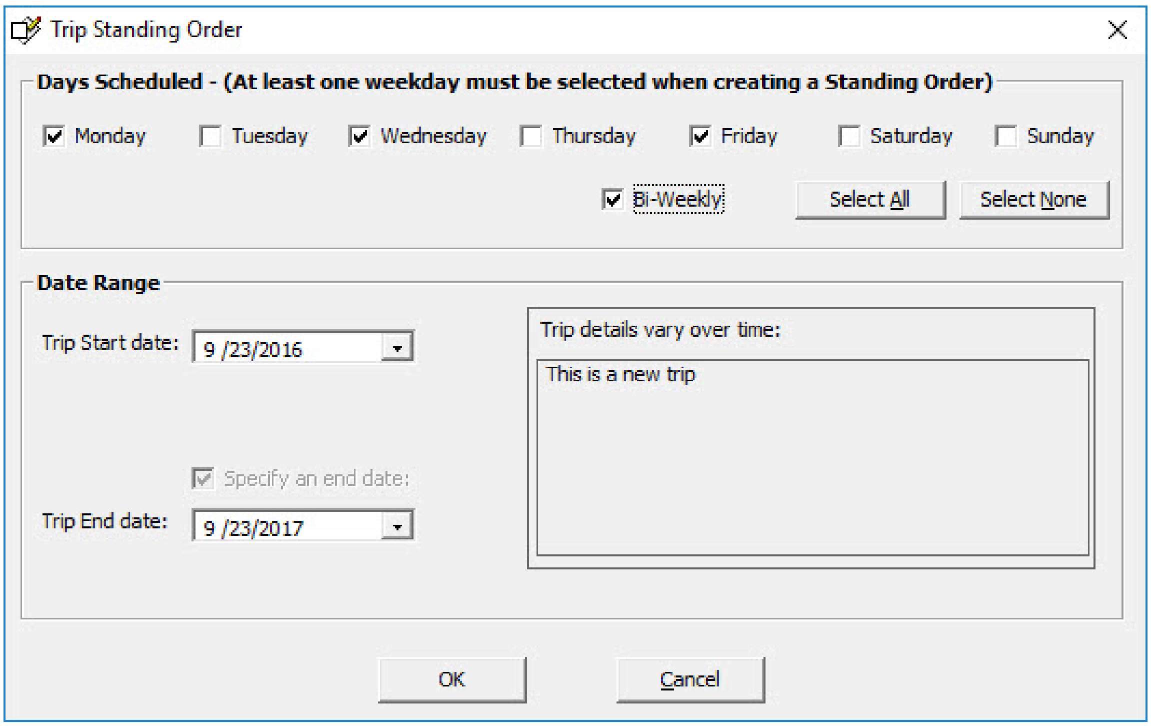
Load and Unload Time	Use these options to define how long it should take the customer to enter and exit the vehicle. You can either use the selected mobility type's default value, or specify a value for this trip only.
Attendant and Guest	Customers commonly bring attendants (such as nurses) and guests (such as family members) with them on their trips. When this is the case, click the Attendant & Guest button and enter the number of those accompanying the customer on their trip. You should also select their mobility types from the drop-down menus.
Assistance Needs	If the customer requires special assistance during their trip, click this button and check the corresponding boxes to designate what they need. You can also include any necessary comments. Drivers in particular require this information so they can properly accommodate the customer. For example, a customer may be hearing impaired, which the driver would need to know before picking them up.
Car Seats	Enter the number of extra seats the customer is going to need for the trip. For example, if a customer has a child, an oxygen tank, etc. they will need more than one seat. Attendant and guest seats are accounted for with the option mentioned above, so their seats should not be included here. The default mobility type for extra car seats is defined in in the Settings module.
Billing Category	If your agency tracks different types of trip billing, you can select an option from this drop-down. This is typically used to filter reports and sort billing rules. Billing Categories are configured in the Settings module under Trip Options.
Trip Type/Trip Purpose	If used, make a selection from the drop-down menus. These two fields allow your agency to sort and organize trip records and can be configured whichever way your agency desires. Commonly, one is a broad category and the other is more specific. For example, an agency may have "Medical" as a broad trip type and "Doctor's Appointment" as a more specific trip purpose.
Requested Trip Time Outside Core Hours?	Check this box if the customer is requesting a trip outside your agency's normal operating hours.

Isolate From Other Passengers?	Check this box if the customer needs to be kept separated from the other passengers on the vehicle.
Service Animal with Customer?	Check this box if the customer is bringing a service animal (such as a guide dog) with them on their trip.
Trip Type/Trip Purpose	If used, make a selection from the drop-down menus. These two fields allow your agency to sort and organize trip records and can be configured whichever way your agency desires. Commonly, one is a broad category and the other is more specific. For example, an agency may have "Medical" as a broad trip type and "Doctor's Appointment" as a more specific trip purpose.
Requested Trip Time Outside Core Hours?	Check this box if the customer is requesting a trip outside your agency's normal operating hours.
Isolate From Other Passengers?	Check this box if the customer needs to be kept separated from the other passengers on the vehicle.
Service Animal with Customer?	Check this box if the customer is bringing a service animal (such as a guide dog) with them on their trip.
Standing Order	A standing order is a recurring set of trips that the customer takes every week. For example, a customer may need a ride to work every weekday at 8:00am. This feature allows you to create all of the trips in RouteMatch at the same time. Click the Make this Trip into a Standing Order button to open a new window and select the days of the week in which this trip occurs. You can also define a date range for when the standing order begins and ends. This may be helpful if the customer requires the standing order for a limited amount of time. Keep in mind that the trips created with this method will all have the exact same characteristics (Pickup/Drop-off address, timing preference, etc.), so make sure this suits the customer's need.
Comments	Enter any other information for this trip not covered by the other fields. You are able to enter up to 400 characters into this field. Click the ellipsis (...) button to display the comments in their entirety.

Bi-Weekly Standing Orders

You can book bi-weekly standing orders, which create a set of trips for a customer that take place every other week. In order to use this feature, you must activate it in the Settings module by configuring the “Show Standing Order Bi-Weekly Option” (found under Trip Options) to True. You can then complete the following steps to create a bi-weekly standing order:

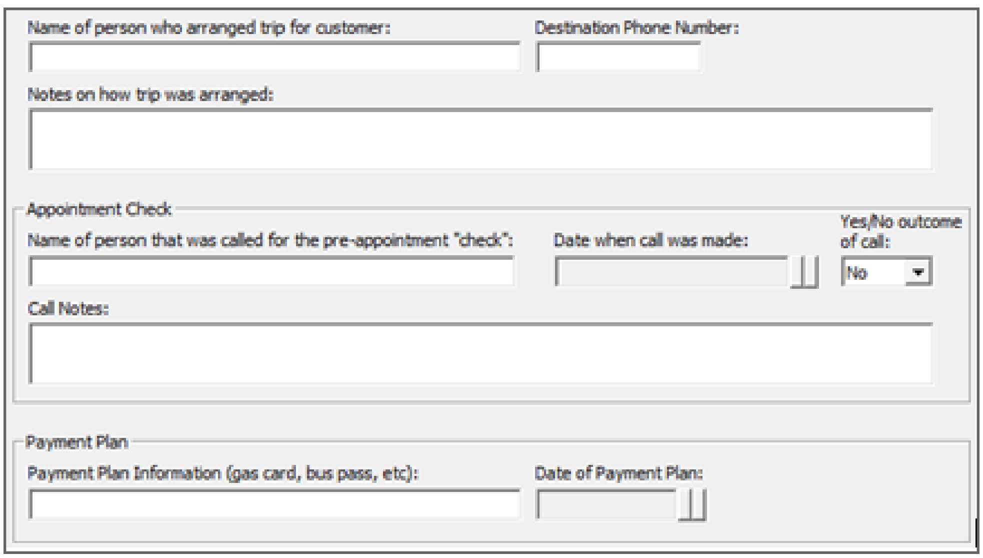
1. In the Trips module, select a customer, open a new trip form, configure the trip as needed, and then click the Make this Trip into a Standing Order button.



2. In the Trip Standing Order pop-up that appears, select which days of the week this trip occurs on and then click the Make Bi-Weekly checkbox.
3. You can then specify the date range of the standing order. The maximum limit is one year to help save on processing time.
4. Click the OK button to create the bi-weekly standing order. An alert displays detailing the trips you have now created. Click OK to close the pop-up.

Appointments Tab

Customers regularly use demand response services for rides to their appointments. Your agency may require you to document the following relevant information with the fields found in the Appointment tab:



- The name of the person who arranged the customer's trip. If a customer lives in a nursing home, for example, the home's staff may be responsible for scheduling all appointments.
- The phone number of the customer's destination. For a medical appointment, this is the number of the doctor's office the customer is visiting.
- Any notes related to how the trip was arranged.
- If your agency performs a pre-appointment call to confirm a customer's trip, you can document the following information:
  - The name of the person who was called.

- » The date when this call was made.
- » Whether or not the trip is confirmed.
- » Any further notes.

» The customer's payment plan information along with any dates.

Custom Fields Tab

The Custom Fields tab allows your agency to record any extra trip data that is not already covered by the other fields. For example, your agency could use this feature to record any of the customer's applicable health insurance numbers. In most cases, if your agency has taken the time to define these fields in the Settings module, you should pay close attention to ensure they are completed correctly.

Trip Saving Options

You have the following options when saving a trip. However, the available options that display in the drop-down depend on the trip you are creating, so you may notice some of the options below are unavailable on your screen. Be sure you select the correct options because each one has a different effect in the system.

> **Note:** Note
>
> The save options that limit the trip to the Trips module prevent it from displaying anywhere else in the application (e.g. Scheduling, Dispatching, Verification). Use this feature to save an incomplete trip and come back to it later, which is necessary when negotiating trip requests. Notice that trips saved this way are accompanied with warning text at the top of the screen. These options must be activated in the Settings module in order for you to use them.

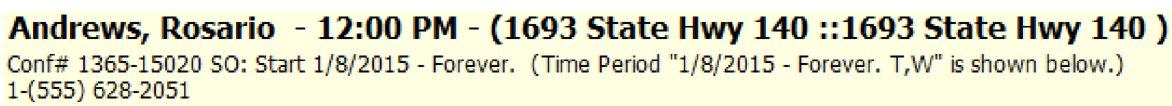
» Save trip for - [mm/dd/yyyy only] (LIMITED To Trips Module): Save the trip for the currently selected date only and restrict it to the Trips module.

» Save trip for - [mm/dd/yyyy only]: Save the trip for the currently selected date only.

» Save trip for - [mm/dd/yyyy only] And Post: Save the trip for the currently selected date and post it to Dispatching. Use this option when you are creating a day-of trip to make it available in the Dispatching module immediately. If you are not creating a day-of trip, this option is not available.

- Save trip for - [mm/dd/yyyy only] and selected days forward (LIMITED To Trips Module): Save the trip for the currently selected date and for a number of other dates in the future. This option also restricts the trip to the Trips module.
- Save trip for - [mm/dd/yyyy only] and selected days forward: Save the trip for the currently selected date and for a number of other dates in the future. This option also allows the trip to be visible in other parts of the software (e.g. Scheduling), instead of just in Trips. Refer to the next section for more information on saving for selected days forward.
- Save trip for this day forward - [All applicable days] (LIMITED To Trips Module): Save a standing order and have its trips visible in the Trips module only.
- Save trip for this day forward - [All applicable days]: Save a standing order and have its trips visible in other parts of the software (e.g. Scheduling), instead of just in Trips.
- Save trip for this day forward - [All applicable days] And Post for [mm/dd/yyyy] only: Save a standing order trip and post the selected day’s trip to Dispatching. Use this option when you are creating a day-of trip to make it available in the Dispatching module immediately. If you are not creating a day-of trip, this option is not available.

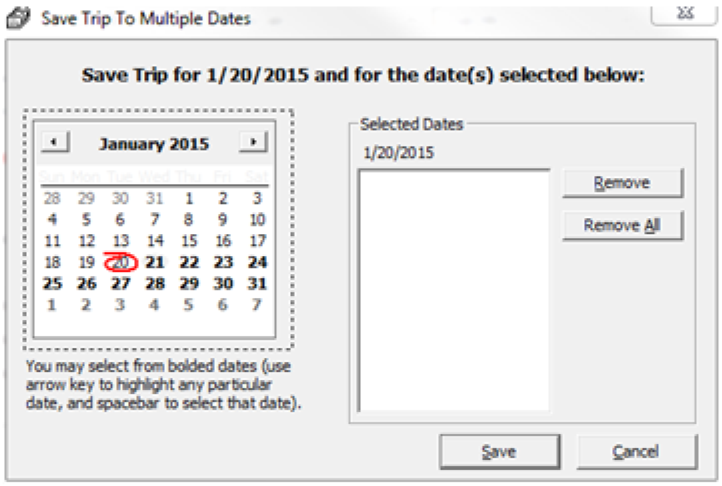
After you save, the system automatically generates a confirmation number for the trip, which displays underneath the customer’s name at the top of the screen. The software also calculates the amount of money the customer owes for the trip based on the applicable billing rules.



How to Save for Selected Days Forward

If you select the Save trip for - [mm/dd/yyyy only] and selected days forward option when saving, you must also assign the appropriate dates to the trip.

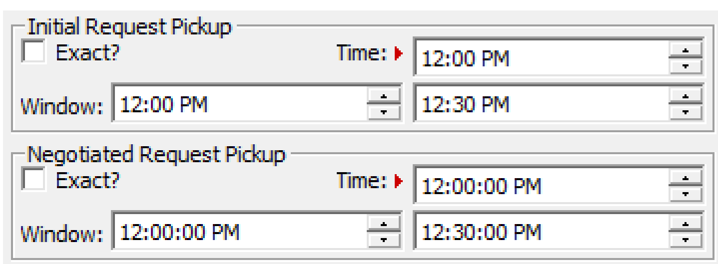
1. When you select this option, the Save Trip To Multiple Dates screen appears.



2. On this screen, click the trip's applicable dates on the calendar to add it to the Selected Dates column (the limit is thirteen). If you make a mistake, it is possible to remove a single selected trip, or all of them at once with the corresponding buttons.
3. When you have all of the correct dates selected, click Save.

Negotiating Trip Requests

Under certain conditions, it may not be possible to accommodate a trip during the time originally requested, so the agency can allow their call-takers to negotiate with the customer. You can manage and track this negotiation with RouteMatch's Trip Negotiation functionality. Trip Negotiation allows you to record both the initial time the customer requested as well as their final negotiated time. The following steps describe how to complete a typical trip negotiation:



1. Enter the customer's requested time in the Initial Request Pickup/Dropoff section.
2. Click Save on the menu bar and select the appropriate (LIMITED To Trips Module) option. You must save the trip before you can continue.
3. Click the Show Recommendations button on the menu bar.

4. Choose Negotiate trip times from the drop-down menu, which opens the Show Recommendations screen.
5. Select a vehicle from the list in the bottom half of the screen. These are the vehicles that fall within the initial request's time window, with the best recommendations appearing at the top of the list.
6. Confirm with the customer that the pickup/dropoff times, listed to the right of the vehicle, are acceptable. If the times are not acceptable, select a different vehicle.
7. Click the Schedule Trip button to fully save the trip.

Example

An agency permits their call-takers to negotiate trip requests due to capacity constraints. A customer calls in and requests a trip pickup for tomorrow at 2:00 p.m. However, when the call-taker enters the initial request into the system, they realize there are no vehicles available at that specific time. The call-taker saves the trip limited to the Trips module and then runs Show Recommendations to find the customer's other options.

The best result has the customer being picked up at 2:30 p.m. When the call-taker presents this option to the customer, they are happy with it despite the late pickup. The call-taker can then enter the trip's negotiated time and fully save it.

How to Create a Return Trip

In order for a customer to take a round trip to a location and back, you must create two separate trips. As stated previously, this is because a trip constitutes one pick-up and one drop-off only. The Trips module contains an option that allows you to book a return trip by completing the following steps:

1. You must first create the customer's initial trip according to the directions above.
2. Select this trip from the bottom left of the screen and notice that the Return Trip button on the tool bar becomes active.
3. Click the Return Trip button and a new trip loads with the previous pickup and drop-off addresses switched. The rest of the trip’s information (funding source, service, etc.) remains the same.
4. Make any necessary changes needed for the new trip. For example, the customer’s timing preference might need to be changed along with their pickup/drop-off times. You can also make this return trip into a standing order, if needed.

5. Click Save on the tool bar and select a save option.

Editing, Canceling, and Deleting Trips

A trip may require changes at some point between the customer's first request and when they actually take the trip. These changes may require a simple update to the trip's record or even the removal of the record completely.

You can edit an existing trip and update its information, provided you are doing so for a future date. Usually, agencies do not allow edits for trips in the past because any discrepancies between the original trip record and what actually occurred in the field are accounted for in the Verification Module.

Many agencies make a distinction when it comes to canceled and deleted trips. Typically, a customer causes a trip to be canceled, while the agency itself deletes a trip. For example, if a customer calls to inform your agency that they will be missing a trip, it is canceled. If, however; the agency needs to remove an unneeded trip, it is deleted. Just be sure to follow your agency's policy concerning cancelations and deletions.

How to Edit a Trip

1. Navigate to the correct customer, select a date on the calendar (must be in the future), and locate the trip you wish to edit.
2. Select the appropriate tab that contains the field(s) you want to change.
3. Enter the needed changes.
4. Click Save on the tool bar and select a save option.

How to Cancel or Delete a Trip

1. Navigate to the correct customer, select a date on the calendar (must be in the future), and locate the trip you wish to delete.
2. Click the trash can icon on the tool bar and select an option from the drop-down window:

» Cancel trip for – [mm/dd/yyyy only]: Cancel the trip for the selected date only.

» Delete trip for – [mm/dd/yyyy only]: Delete the trip for the selected date only.

» Delete trip for this day forward - [All applicable days]: Use this option to delete a standing order.

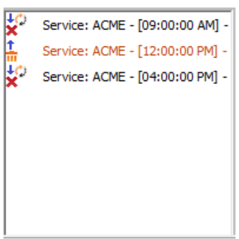
3. A warning now displays to confirm your decision to cancel or delete the trip. Click Yes to proceed.

4. If the trip is chained to other trips, a pop-up will display. Select the trips in this pop-up you would like to cancel along with the original trip by checking the boxes in the Select column. Click Save and Return to compete the cancelation/deletion.

How to Display Canceled and Deleted Trips

When you delete or cancel a trip, it no longer appears on the screen. However, if you need to refer to a trip's record after it has been removed, you can do so by completing the following steps:

1. Navigate to the correct customer and select the date for which you would like to view canceled/deleted trips.
2. Click the Include Deleted/Canceled Trips button on the right side of the tool bar.
3. Canceled and deleted trips now appear on the screen. A trip with a red X has been canceled and a trip with a trash can symbol has been deleted.



CHAPTER 2

Helpful Features for Creating Trips

RouteMatch offers a number of features that can help simplify and speed up the trip creation process. You should familiarize yourself with these features to improve your productivity and avoid redundant work. Most of the features detailed in this section have similar functionality, but they are intended for use in different scenarios.

Example

Amy Medina calls in and requests her weekly trip to the grocery store. The call-taker could navigate to the last date Mrs. Medina took the trip and use the Copy Existing feature to apply the trip to a new date. However, it would probably be faster to find the old trip with the Previous Trips feature. Also, if the Amy really does take this trip every single week, then it could be a good candidate for one of her favorite trips. This would help the call-taker save even more time.

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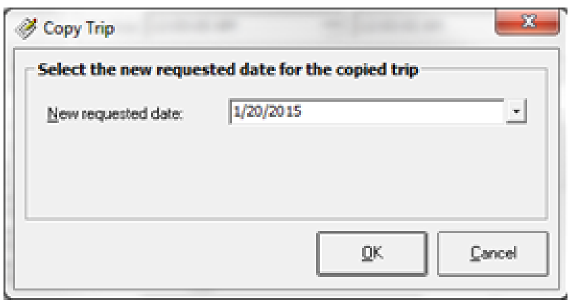
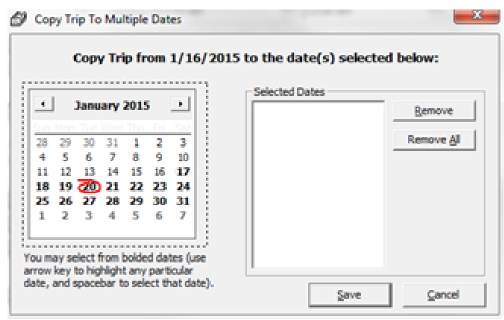
Copy an Existing Trip

The Copy Existing feature allows you to make a copy of any already-existing trip and apply it to a new date. Again, this functionality can be helpful for general use, but one of the other features explained in this section might be a better option, depending on the situation.

1. Navigate to the correct customer, select a date on the calendar, and find the trip you wish to copy.
2. Click the Copy Existing button on the tool bar.
3. From the drop-down menu, choose whether you want to copy the trip for a single date or multiple dates.
4. In the screen that appears, select the applicable date or dates.



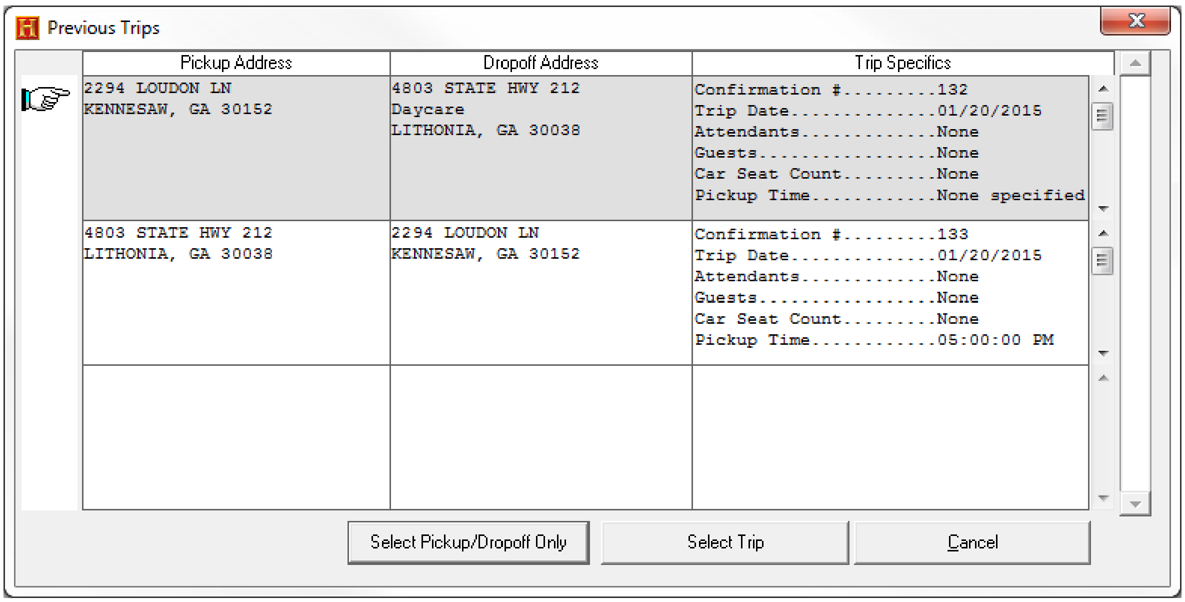


5. Make any necessary changes to the newly created trip(s). If you do copy the trip to multiple dates, the trips save but you can go back and edit them.
6. Click Save on the tool bar and select an option from the drop-down.

Previous Trips

This feature allows you to locate a trip the customer took in the past and create a new trip using the previous one's details.

1. Navigate to the correct customer and click New.
2. Click the Previous Trips… button located next to the drop-off address field. The screen that appears displays a history of all the previous trips taken by the customer sorted by the number of times and how often the trips were taken.

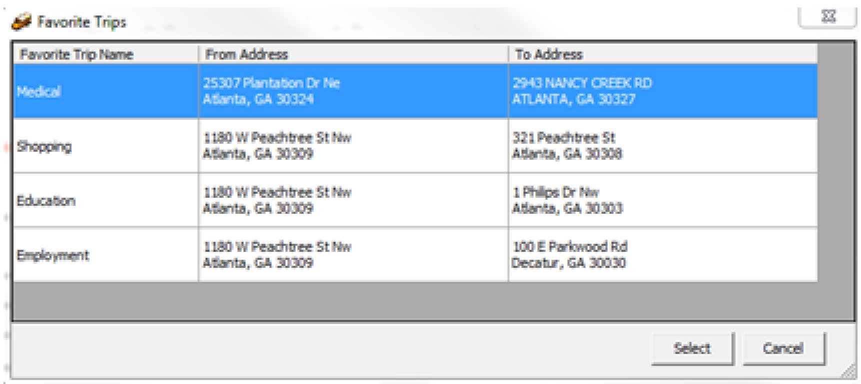


3. Select one of the customer's previous trips.
4. You can either transfer all of the trip's information to the new trip (Select Trip) or just have the pickup and drop-off addresses transfer (Select Pickup/Drop-off Only).
5. The Trips screen is then populated with the previous trip's information. You can now proceed with the trip creation process.

Favorite Trips

This feature allows you to use a customer's previously-configured favorite trip as the basis for a new trip. Favorite trips are typically those that a customer takes often, so this feature can save you the redundancy of creating the same trip from scratch every time the customer needs to take it. A customer's favorite trips are assigned in the Customers module; please refer to the Customer's guide for more information.

1. Navigate to the correct customer and click New.
2. Click on the Favorite Trips… button located next to the Previous Trips button. The Favorite Trips screen then appears.



3. Select one of the customer’s favorite trips.
4. Click Select to populate the Trips screen with the favorite trip's information. You can now proceed with the trip creation process.

Group Trips

If your agency utilized RouteMatch's Group Trip functionality, you must add customers to groups in the Customers module. Once your customers are sorted into their groups, you can book a group trip in the Trips module. This effectively allows you to create a trip and apply it to multiple customers at the same time.

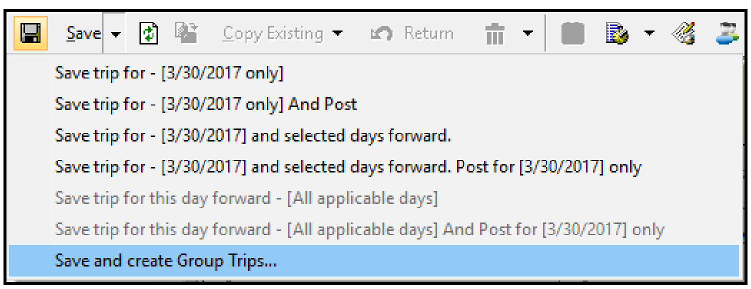
Note: Refer to the Customers Module User Guide for more information on creating customer groups.

How to Create a Group Trip

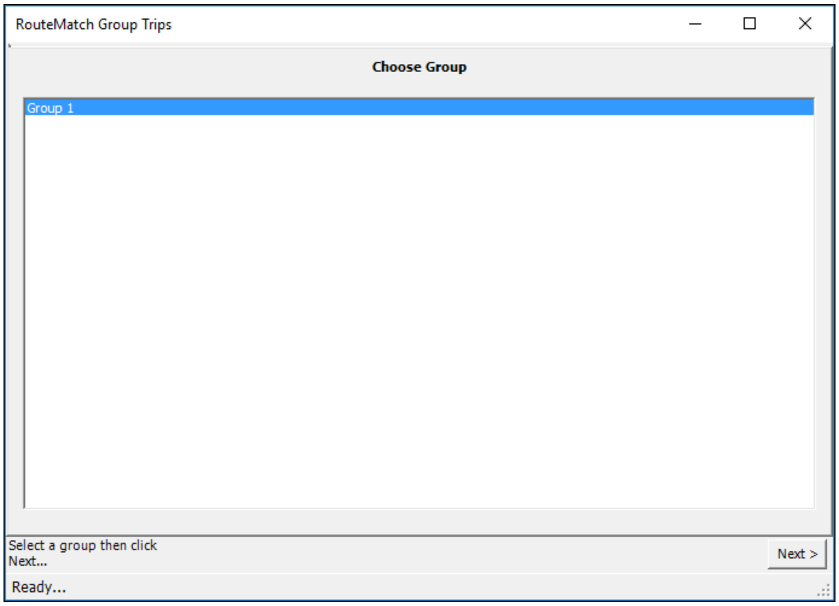
1. In the Customers module, select a customer who is a member of the intended group.
2. Click the **New** button on the toolbar and then configure the trip as needed.

Note: If you select a funding source for a group trip, all customers in the group must have that funding source.

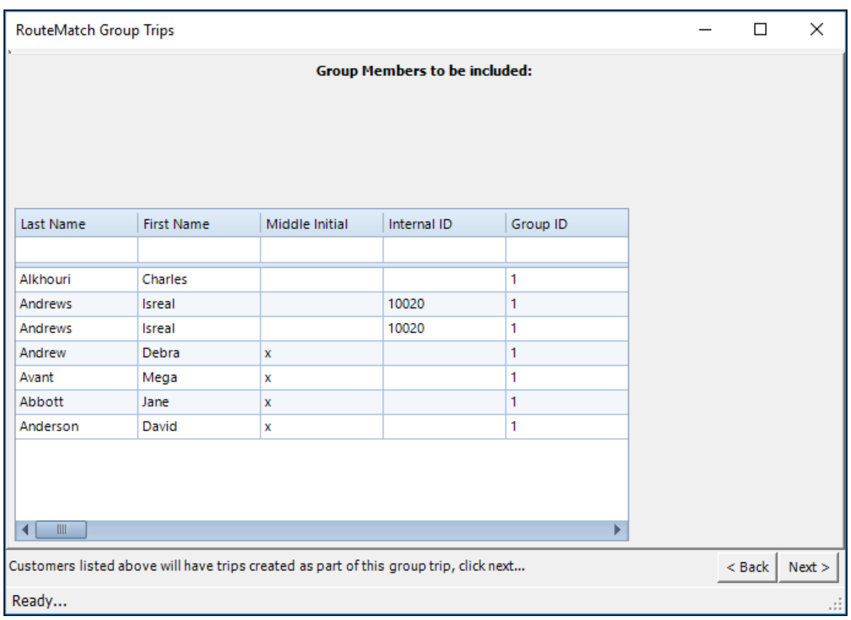
3. Once the trip is set up, click the Save button on the toolbar and select the **Save and create Group Trips** option.



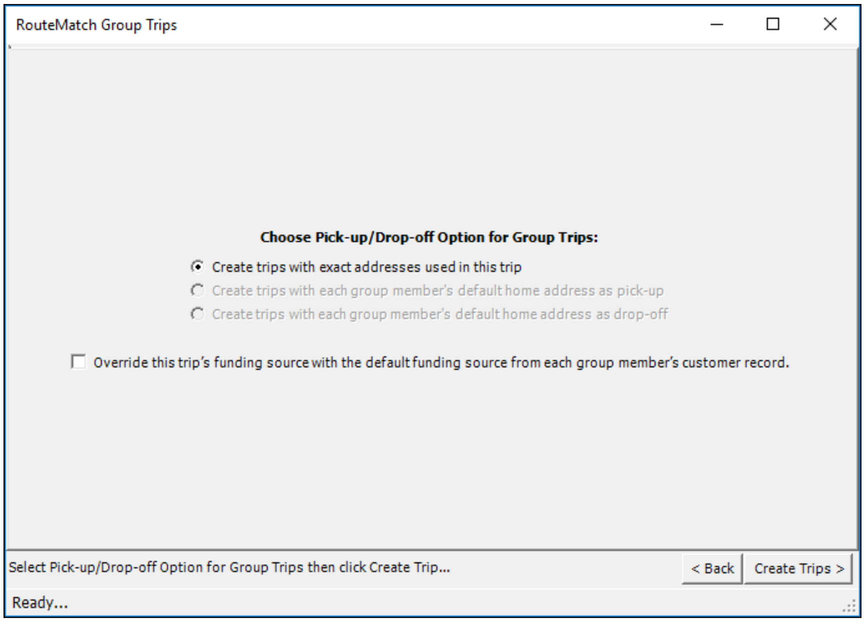
4. Select one of the customer's groups on the screen that appears. Then, click the **Next** button.



5. The screen then displays the group's members so you know who is going to be assigned the trip. If this list is correct, click the **Next** button.



6. You then need to select a pickup/drop-off option for the trip. You have three options:



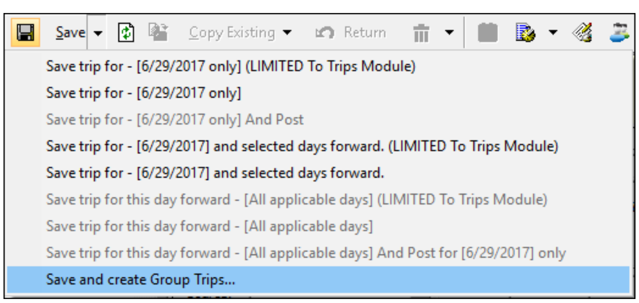
- Use the pickup/drop-off addresses selected for the initial trip (from step 2)
- Use each group member's default home address as the pickup address
- Use each group member's default home address as the drop-off address

7. You also have the option to override the trip's funding source with each group member's default funding source. Do this by clicking the checkbox.
8. Once the group trip is configured correctly, click the **Create Trips** button at the bottom of the screen. The system then creates individual trip records for each customer in the group.

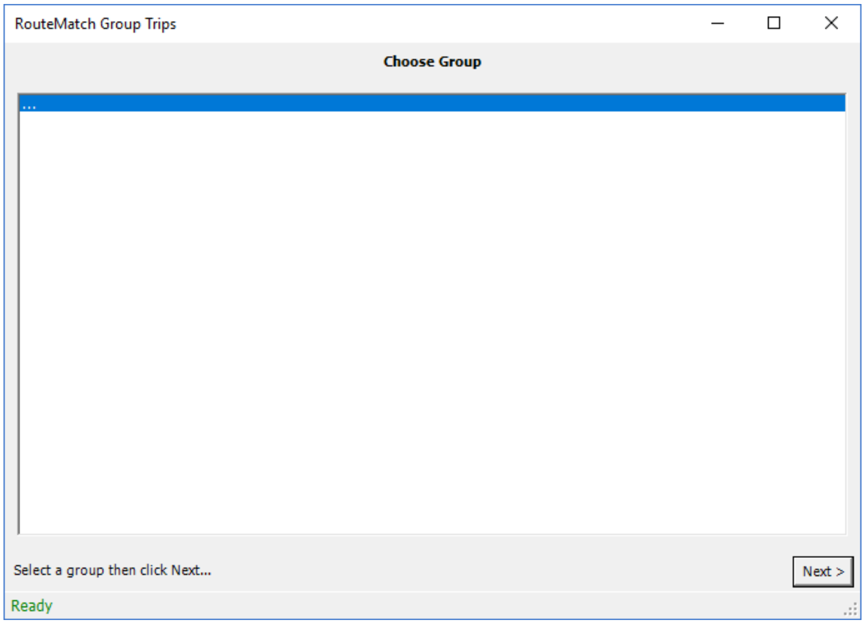
On the Fly Group Trips

The Group Trip Booking feature also allows you to create an impromptu group when booking a new trip. Do this by completing the following steps:

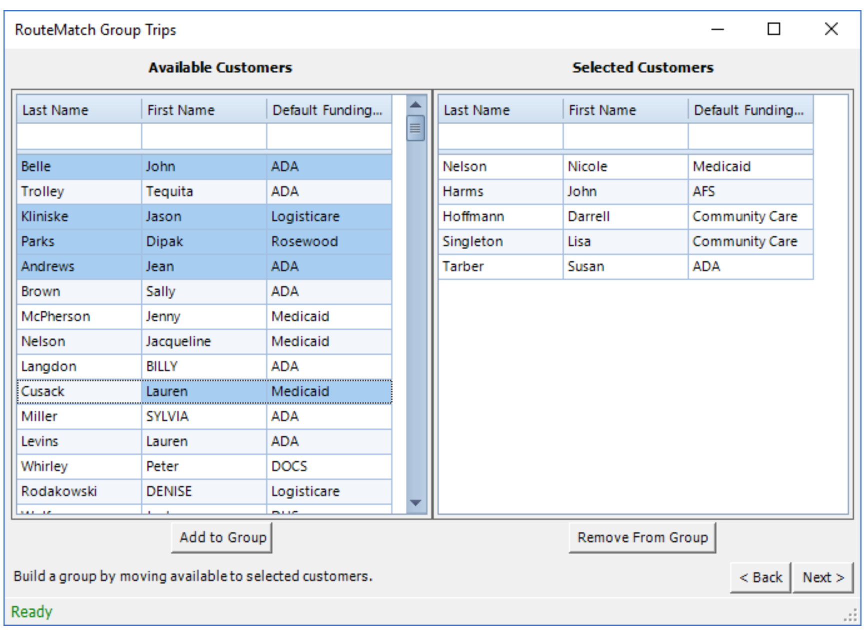
1. Once you have configured the customer's trip correctly, click the Save button on the toolbar and select the **Save and create Group Trips** option.



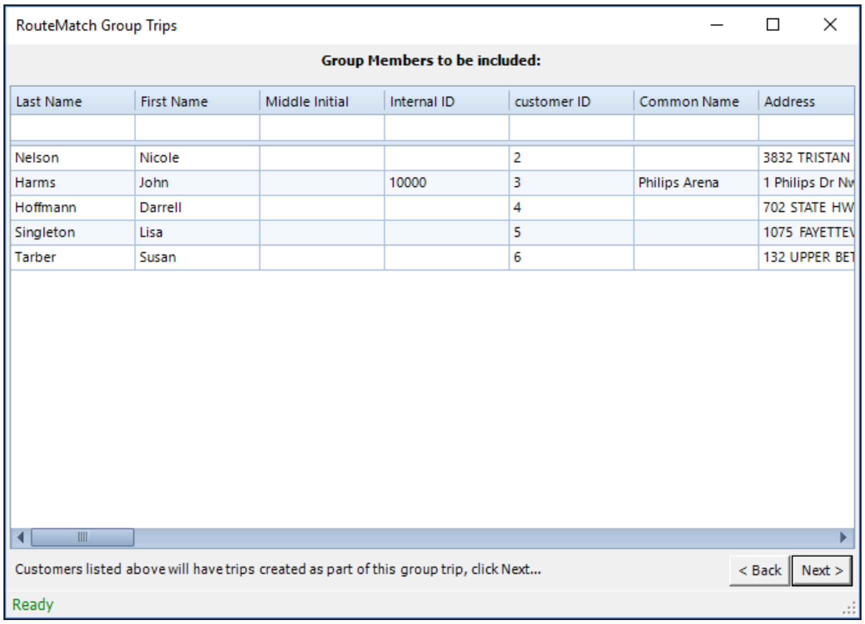
2. Select the ellipsis (...) option on the screen that appears and then click the **Next** button at the bottom of the screen.



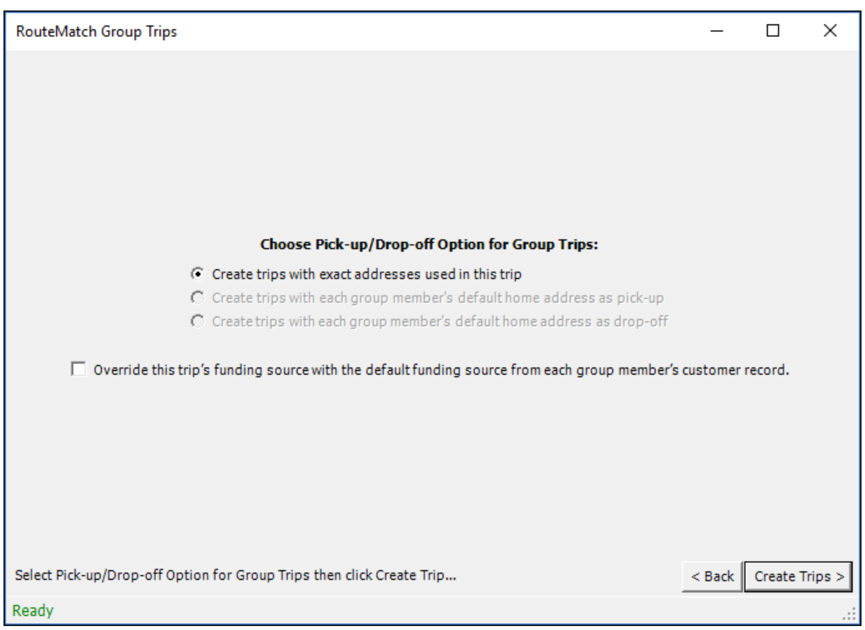
3. Select which customers to add to the group. You can use the "control" or "shift" buttons on your keyboard to select multiple customers. Then, click the **Add to Group** button to move the customers to the right side of the screen and include them in the group.



4. Click the **Next** button at the bottom of the screen once you have added all needed customers.
5. The next screen displays all of the customers you have selected for the group. If this list is correct, click the **Next** button at the bottom of the screen.



6. You then need to select a pickup/drop-off option for the trip. You have three options:



- Use the pickup/drop-off addresses selected for the initial trip
- Use each group member's default home address as the pickup address
- Use each group member's default home address as the drop-off address

7. You also have the option to override the trip's funding source with each group member's default funding source. Do this by clicking the checkbox.
8. Once the group trip is configured correctly, click the **Create Trips** button at the bottom of the screen. The system then creates individual trip records for each customer in the group.

Trip Planner

The Trip Planner enhancement provides you with an easy way to book trips that combine demand response and fixed route solutions. This creates a fixed route trip itinerary for the customer. Essentially, when a person needs to take a trip, the Trip Planner can be used to determine if there is a fixed route ride (possibly involving transfers on the fixed route system, since both stops might not be on the same route) that can handle this request.

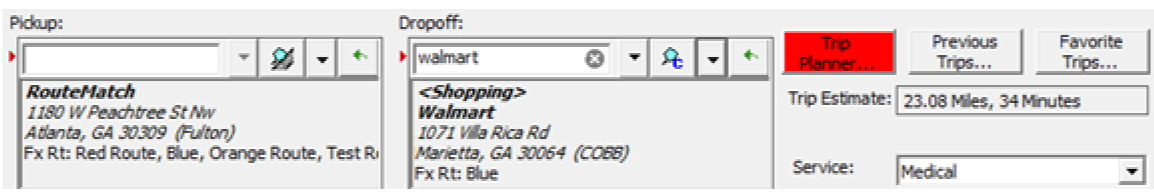
This gives you the option of offering the customer a fixed route trip as a less expensive alternative to an A to B demand response trip. It is also possible to combine the two and, for example, offer the customer a ride to the fixed route stop and do the same for the trip back.

Note:

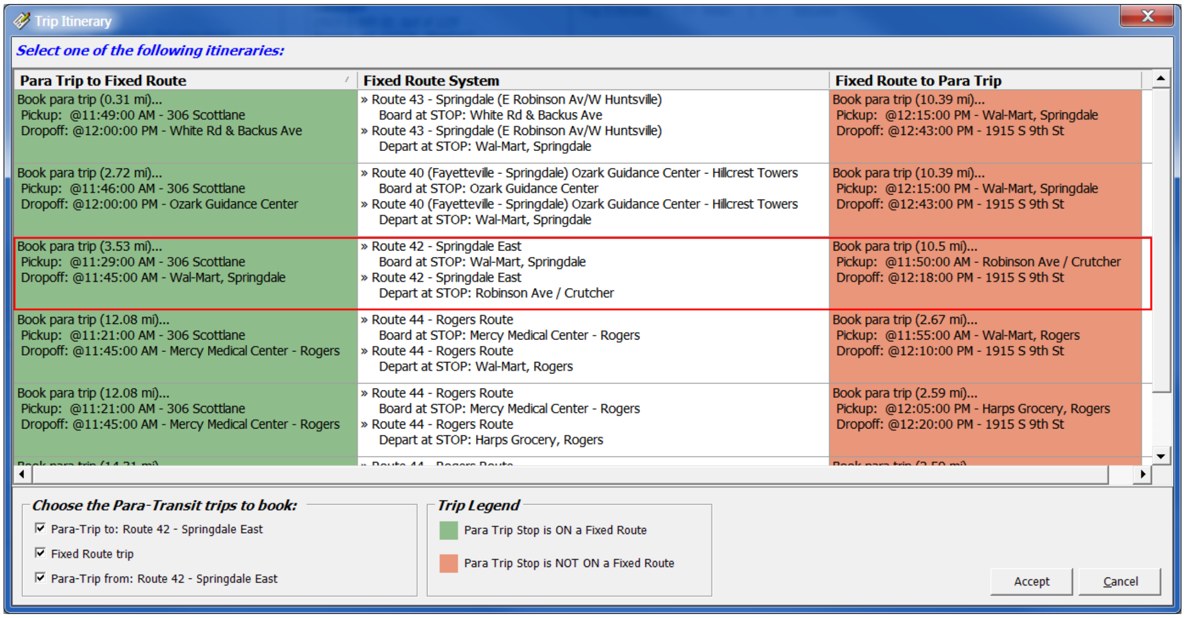
If you do not see the Trip Planner button, it may not be activated in the Settings module. The "Trip Planner Button Is Visible In New Mode?" setting found under Trip Options must be set to True in order for the feature to be used.

How to Use the Trip Planner

1. Click New on the tool bar to begin creating a new trip.
2. Enter the addresses for the trip's pickup and drop-off. If either address lies within the designated service area of a Fixed Route, the Trip Planner button turns red.



3. Click the button to display the Trip Itinerary window which shows all the options you have for assigning fixed routes to this trip.



4. From this screen, select the itinerary that best suits your customer's needs. This screen has three colored columns:

   A. Green – The demand response trip that takes the customer to the fixed route stop.

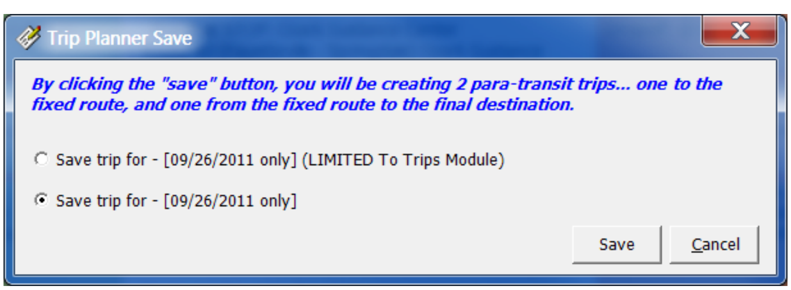
   B. White – The fixed route system the customer can then use for the bulk of their trip.

   C. Red – The final demand response trip that takes the customer from the fixed route stop to their intended destination.

At the bottom of the screen there are a series of check boxes. From here, select the parts of the itinerary you wish to schedule.

5. Click the Accept button. If you choose to schedule the para-transit trips only, an alert will display to make sure you have made the correct decision.

6. In the Trip Planner Save window, select an option and click the Save button:



- Save trip for – [mm/dd/yyyy only] (LIMITED To Trips Module) - Save this itinerary for today and have it show in the Trips module only. You may need to select this option if you want to confirm the trip with the customer before it is scheduled.
- Save trip for – [mm/dd/yyyy only] - Save this itinerary for the selected date only.

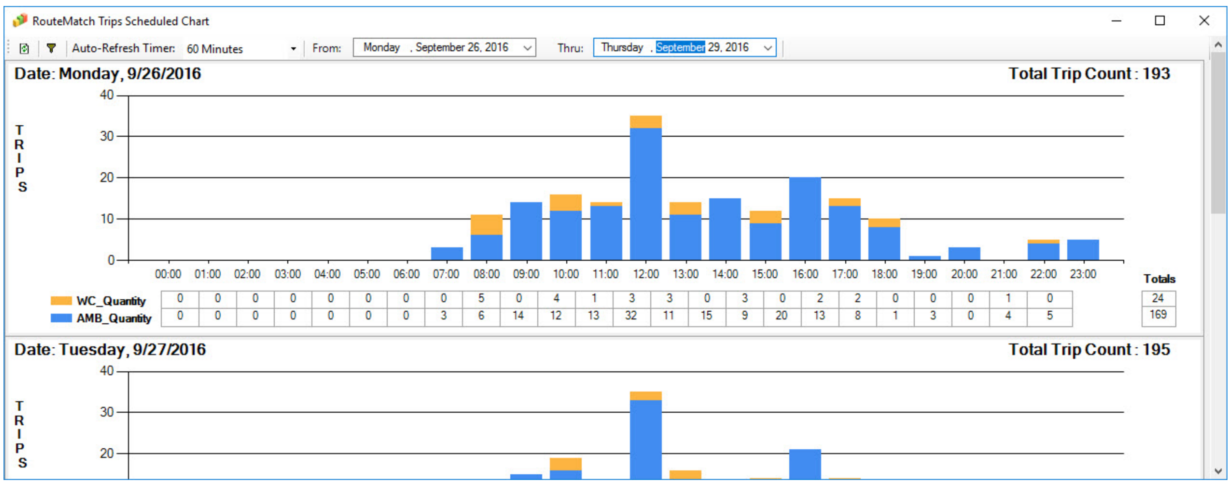
7. After saving, these trips are displayed in the Trips module under the name of the corresponding Fixed Route (as selected on the itinerary). Also, the trip comment field is updated to include the travel instructions from the itinerary. Be aware that if you edit the pick-up location of this trip after saving, it will no longer be a "Trip Planner" trip unless you complete the steps above again.

Requested Trip Data Summary

There is a pop-up window that allows you to view a chart of requested trips organized by hour. This should give you a good idea of which times of day are going to be busy, so you can plan accordingly. On the toolbar, you can make the following changes to the data displayed in the chart:

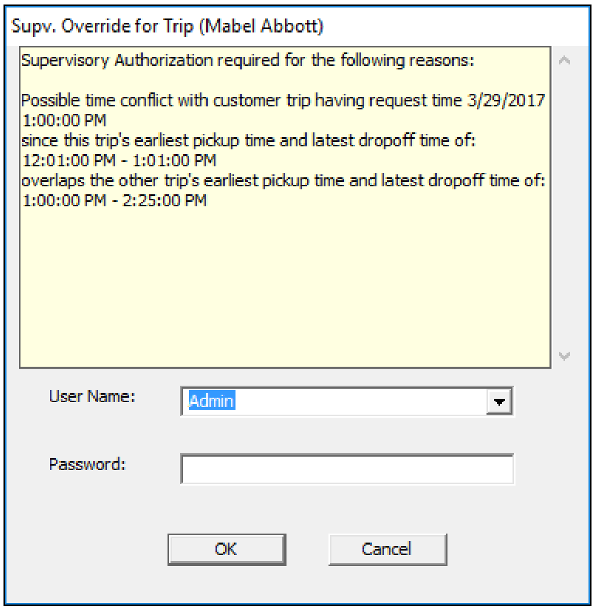
- Filter which services and funding sources to include in the chart
- Set the auto-refresh timer
- Select which dates you want to view

Notice that the bar graph breaks up the trips by their wheelchair and ambulatory mobility types, and provides the totals of each in the bottom right.



Trip Time Conflict Checking

RouteMatch can inform a user that the trip they are creating conflicts with one of the customer's existing trips. For example, say a customer already has a trip booked for 9:00am-10:00am on Thursday. If you attempt to create another trip for 9:30am, then an alert displays informing you that the new trip conflicts with the existing trip. This alert requires a supervisor's override in order to complete the trip booking.



How to Activate Trip Time Conflict Checking.

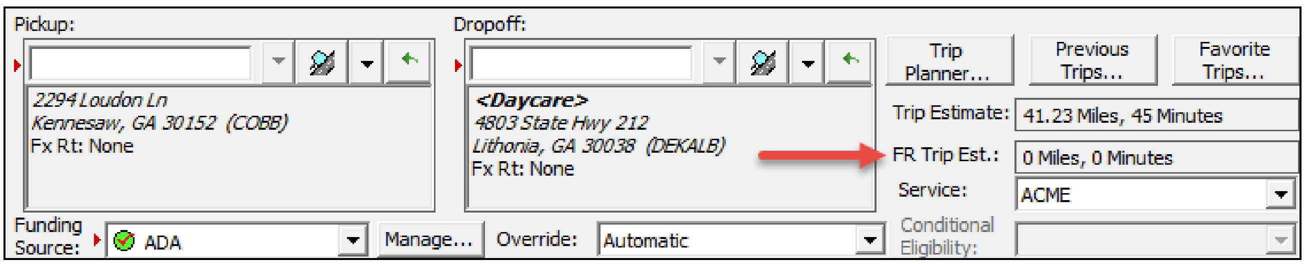
1. Open the Settings module and locate the **Enable Trip Time Conflict Checking** setting found under Trip Options.
2. Change the setting to **True**.
3. Click the **Save** button at the top of the screen. You may need to close RouteMatch and restart it in order for this change to take effect.

Comparable Fixed Route Ride Time

Many agencies are required by ADA regulations to avoid booking excessively long paratransit trips for their customers. This is done by comparing the trip's travel time to a similar fixed route trip. For example, a 1-hour travel time for a 5-mile paratransit trip may seem excessive. However, if the same trip takes an hour using the fixed route system, it is comparable, not excessive.

In order to support this requirement, RouteMatch displays the comparable estimated fixed route trip distance and time in the Trips module when booking a new trip. Your staff can then compare these values with the Trip Estimate field to determine whether or not the paratransit trip's time or distance are unreasonably long.

Note: If your agency would like to utilize this feature, please contact RouteMatch staff.



CHAPTER 3

Other Key Features

The Trips module offers a number of other features which can assist you with various tasks. Acquaint yourself with the items in this chapter to use the module to its full potential.

This chapter discusses the following:

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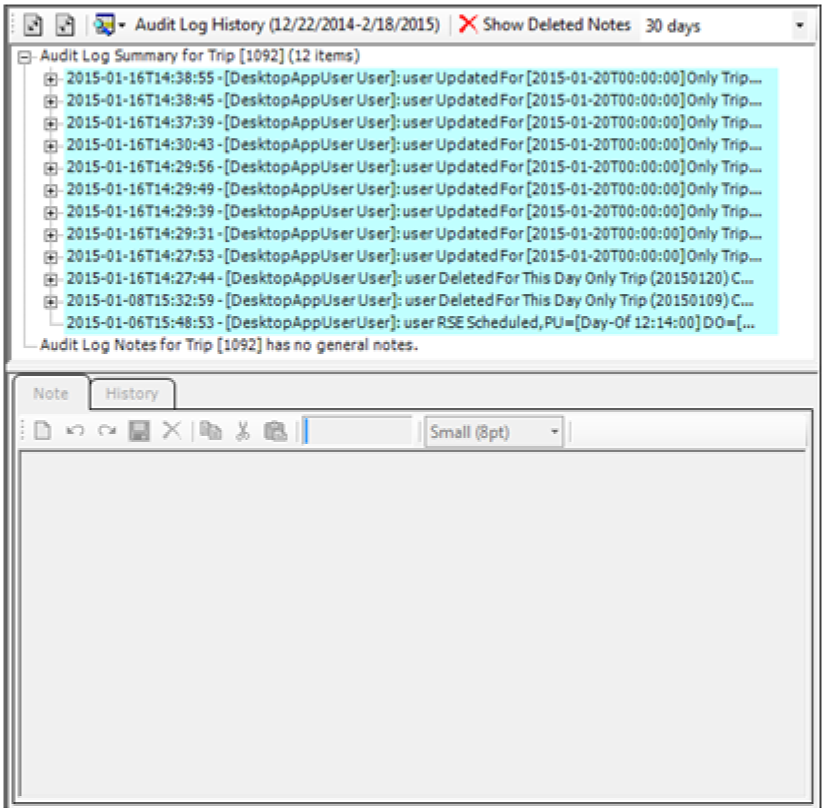
Audit Log

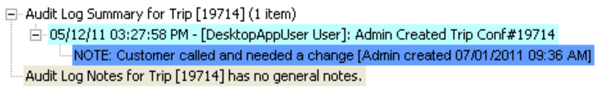
The Audit Log automatically keeps track of all changes made to a trip. You can view these changes by expanding the lists in the main section of the window.



You can also add notes to any of these changes by completing the following steps. This may be necessary if you want to explain the reason you made a certain change to the trip.

1. Expand the lists in the trip's Audit Log Summary to display all of the changes.
2. Select a specific change that was made to the trip. You can also add a general note for the whole Audit Log.
3. In the bottom half of the window, click the New Note button.
4. Enter text for the note (e.g. describing the nature of the change, why the change was made, etc). The blue bar that fills as you type keeps track of the amount of text you are allowed to enter on the note. When the blue bar is full, text can no longer be entered in the window.
5. When all appropriate notes have been entered, click the Save icon.

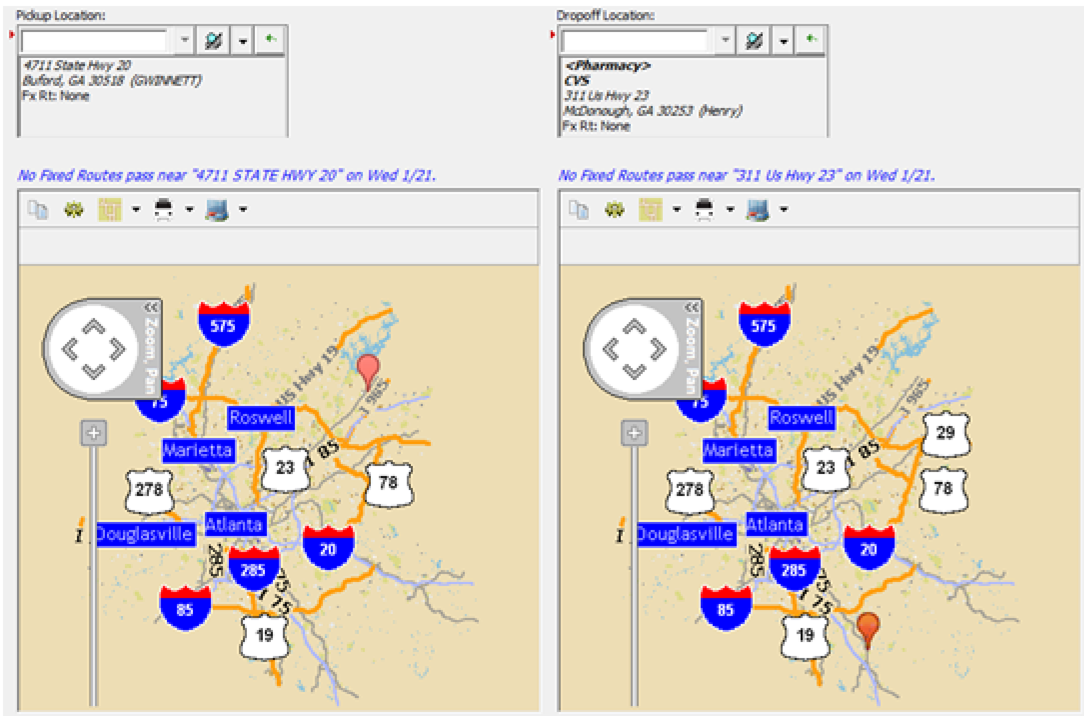
6. Notice the note is saved underneath its corresponding change in the upper half of the screen. Click the plus sign next to the change to expand the list of all notes related to that change.



Map Tab

You can use the Map tab to view a trip's pickup and drop-off locations side-by-side on two integrated RouteMatch maps. The maps on this screen have the same controls as the maps located in other parts of the software (refer to the Map Controls User's Guide for more information).

Notice that each map has a teardrop icon placed on it, which indicates the location of the pickup (on the left) or the drop-off (on the right). You can use this feature to gain a general understanding of how far the two locations are from each other.



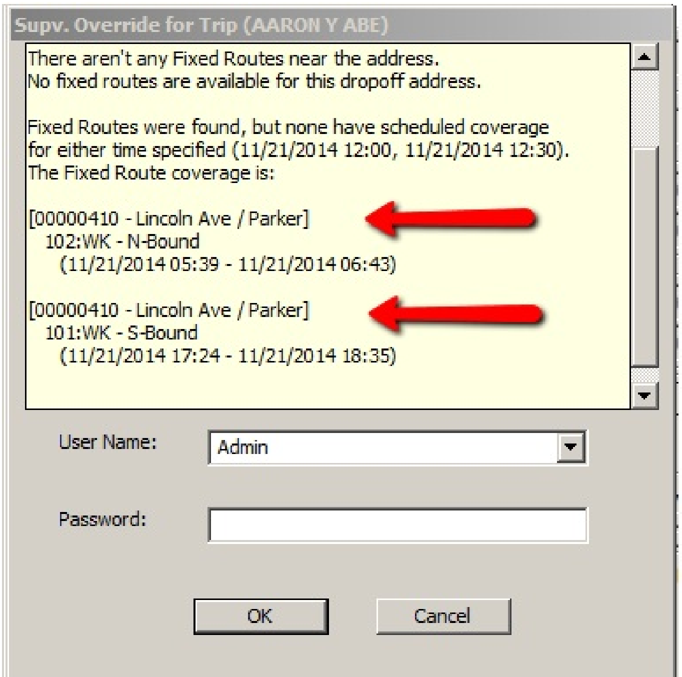
Trip Status Icons

You will notice that as trips are created and scheduled, icons appear next to them. A trip may have multiple icons depending on which of the below criteria apply to it:

- Arrow ↑↓ - Indicates whether this trip has a pickup or drop-off timing preference. An up arrow means it has a pick-up preference while a down arrow means it has a drop-off preference.
- Lock - The trip is for a date in the past and it is currently available for review in the Verification module. You may not be able to edit these types of trips according to your agency's policies.
- Wheelchair - The customer taking this trip is in a wheelchair.
- Arrow Circle - This trip is a standing order.
- Route - Indicates that this trip has demand response and fixed route solutions combined with the Trip Planner feature.
- Red X - The trip has been canceled.
- Trash Can - The trip has been deleted.

ADA Corridor Alert

An alert appears if you attempt to book a trip outside your agency's ADA corridor to inform you that there aren't any fixed routes near the customer's address. This alert also informs you of any master routes that may qualify, but do not have scheduled covered for the specified time.



Show Trip in Scheduling

You can quickly view a trip in the Scheduling module by completing the following steps. This feature is a helpful time saver and can assist you when searching for a specific trip to schedule.

1. Navigate to the correct customer and select a trip.
2. Click the Show Trip in Scheduling button.
3. The screen switches to the Scheduling module with the trip already selected.
4. From here you can schedule the trip to a vehicle or run.

Show Recommendations

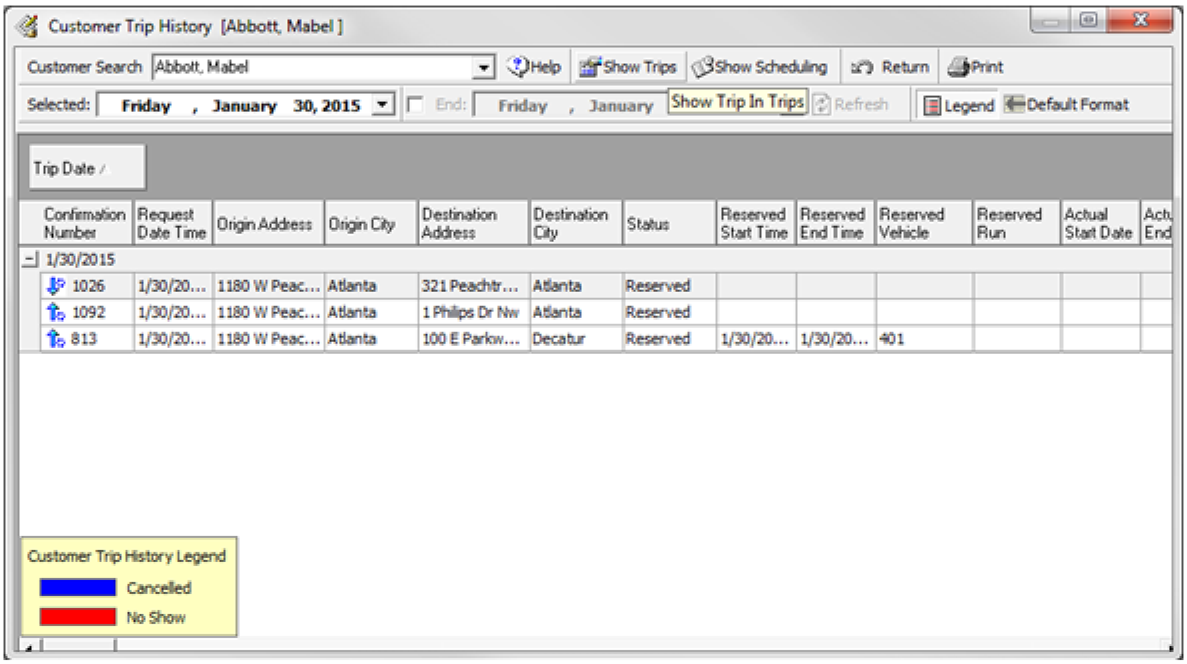
The Show Recommendations feature found in the Scheduling module can also be accessed from the Trips module. This allows you to schedule the currently selected trip with the assistance of RSE, which is necessary when negotiating trip times (explained above).

1. Navigate to the correct customer and select a trip.

2. Click the Show Recommendations button.
3. This option displays all possible vehicles that can apply to the trip. From this screen, select a vehicle and schedule the trip to it.
4. For further instructions on scheduling trips, refer to the Scheduling User's Guide.

Customer Trip History

The Customer Trip History screen allows you to view a customer’s verified, scheduled, and unscheduled trips for a selected date or date range. In order to access the customer’s trip history in the Trips module, click the corresponding button on the tool bar.



View a Customer's Record

When working in the Trips module, you can navigate to the currently-selected customer's record in the Customers module by clicking the corresponding tool bar button. This can come in handy if you need to update the customer's information when they call in to request a trip (they may have a new phone number, for example).

Print Trip Information

1. Navigate to the correct customer, select a date on the calendar, and find the trip you wish to print.
2. Click the arrow next to the Print button on the tool bar.

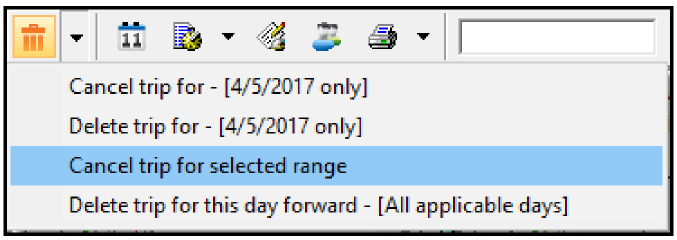
3. From the drop-down list, choose to print out either the trip audit log or the trip’s information.
4. A screen displays which is populated with the information you requested. From here, you can print out a copy by clicking on the button.

Temporarily Suspend a Standing Order

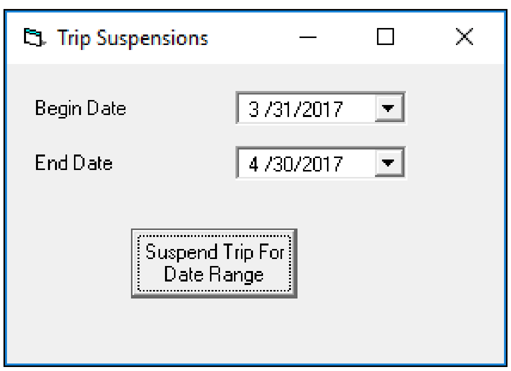
Users are now able to temporarily suspend a standing order for a specified amount of time. For example, if one of your customers is going to be out of town for two weeks, you can suspend their standing orders until they come back.

How to Temporarily Suspend a Standing Order

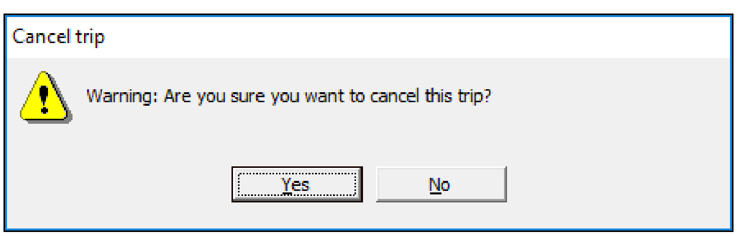
1. In the Trips module, select the standing order you would like to suspend.
2. Then, click the Cancel button on the toolbar and select the **Cancel trip for selected range** option.



3. In the screen that appears, select the **Begin Date** and **End Date** of the suspension from the drop-down calendars.



4. Click the **Suspend Trip for Date Range** button.
5. You are then prompted with a warning. Click the **Yes** button to confirm the suspension.



6. The standing order is then cancelled for the date range you selected in step 3.

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