User Guide
The RidePilot platform source code is released as open-source software under the GNU Affero General Public License v3 (http://www.gnu.org/licenses/agpl-3.0.en.html).

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Introduction

Overview
RidePilot is an open source, web-based Computer Aided Scheduling and Dispatch (CASD) software system designed to meet the needs of small-scale human service Demand-Response Transportation (DRT) agencies. Originally developed for Ride Connection in Portland, OR, RidePilot allows authorized users to:

• Maintain Customer, Driver, and Vehicle information
• Manually create and maintain Subscription / Daily Trips and Runs
• Assign Trips to Runs
• Generate Reports from virtually any tables within the underlying database
• View vehicle locations in real time using the new Map component

User Types
RidePilot is designed to serve the needs of many different types of users, with features and functions appropriate for each one:

• System Administrator - Are “super-users” who maintain the RidePilot software. The System Administrator has access to, all providers within their region, data, and the ability to make any changes necessary.
• Provider Administrator – Similar to a System Administrator, but they only have access to their own organizations information.
• Editor – An editor can view and edit the information all tabs. The editor is not able to update or edit information in Provider or System settings.
• User – This account has the ability to create and edit trips, however most will use this user type for drivers who will not access RidePilot on a consistent basis.

The remainder of this Guide describes the features available to each of these user types.
Accessing RidePilot
RidePilot is implemented as a web-based application that provides an enhanced user experience with cross-browser compatibility.

To access RidePilot, you need:

- A desktop computer, tablet or mobile device
- An internet connection
- A HTML5-compatible internet web browser such as:

<table>
<thead>
<tr>
<th>Web Browser</th>
<th>Device</th>
<th>Supported Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple Safari</td>
<td>Desktop</td>
<td>7+</td>
</tr>
<tr>
<td>Apple Safari Mobile</td>
<td>iOS 8</td>
<td></td>
</tr>
<tr>
<td>Google Chrome</td>
<td>Desktop</td>
<td>36+</td>
</tr>
<tr>
<td>Microsoft Edge</td>
<td>Desktop</td>
<td>1+</td>
</tr>
<tr>
<td>Microsoft Internet Explorer</td>
<td>Desktop</td>
<td>11+</td>
</tr>
<tr>
<td>Mozilla Firefox</td>
<td>Desktop</td>
<td>35+</td>
</tr>
</tbody>
</table>

For best performance and compatibility, it is recommended that you upgrade to the latest version of your web browser.

Login
For the UTA deployment, RidePilot can be accessed at https://ridepilot.rideuta.com/.

Once the page loads, you will be prompted to login. Enter your email or username and password and click Log In.

If you cannot remember your password, click Forgot your password? and you will be emailed details on how to reset it or by answering your security questions.
User Interface

The basic controls of the RidePilot application appear on each page:

- Title bar containing the name of the application, the name of the User who is currently logged in, and the name of the selected Provider (typically the Provider that the User is affiliated with).
- A series of tabs that display the various pages within the application. Each of these tabs is described below.
- Page body that changes based upon the selected tab.
- Page footer indicating the version number.

Help

RidePilot help can be accessed in several different ways:

- **Guide.** This user guide.
- **Panel help.** This context-sensitive help explains the purpose of various panels displayed within RidePilot. The help is displayed within a pop-up window by hovering the mouse pointer over the '?' in the top-right corner of the panel.
- **Label Help.** This context-sensitive help explains the meaning and purpose of the various labels displayed within RidePilot. The help is displayed within a pop-up window by hovering the mouse pointer over the '?' to the right of the label.

If you still have questions, you can send an email to RidePilot support at mobility@rideuta.com.
Tabs

Dispatch

The Dispatch tab is the key tab for a dispatcher. This tab will allow you to quickly and easily schedule your trips to runs. This tab displays all runs for any given day. The default day is the current day, but can be changed to show any one day of service.

The Dispatch tab is broken up into three main sections, the Runs panel, individual Run panel(s) and the Trips panel. The Runs panel lists all your runs for the day selected in the date filter. The Trips panel lists all the trips that have not been scheduled onto a run (Unscheduled Queue) or that are listed as Standby (Standby Queue).

Runs Panel

The Runs panel is where you can quickly view the runs for the day, whether or not they are a subscription/recurring run, the vehicles and drivers assigned, the start and end times, and the trips currently assigned to the runs.

Across the top of the table you can see your total number of runs and how many are either recurring or daily. There are three icons on the right of the table:

- Add a new run for the day.
- Close all open run panels.
- Collapse / Expand the Runs Panel.
The Runs panel is comprised of seven columns: Name, Vehicle, Driver, Start Time, End Time, Trips, and Actions.

- **Name** – The name given to a specific run. Next to the Run there is an indicator to let you know quickly whether the run is subscription/recurring.
  - **Recur** - Means that this run is a subscription or recurring run.
- **Vehicle** – The name of the vehicle assigned to the run.
- **Driver** – The name of the driver assigned to the run.
- **Start** – The time the run is scheduled to start.
- **End** – The time the run is scheduled to end.
- **Trips** – The current number of trips assigned to the run.
- **Actions** – Different actions you can take regarding the run.
  - **View details of the run.**
  - **View subscription run template.**
  - **Print the manifest for that specific run.**
  - **New trip. Create a new trip on that specific run.**
  - **Edit the details of the run.**
  - **Cancel the specific run.**

Within the Runs Panel there are two different warnings that could appear in either the Vehicle or Driver columns. If a driver or vehicle is highlighted yellow, it means that a compliance event is past due. This warning will allow the driver or vehicle to still be assigned to a run. If a driver or vehicle is highlighted red it means that a legal event is passed due. This type of warning will NOT allow the vehicle or driver to be assigned to the run.

To determine what event is passed due you can either use your mouse to hover over the highlighted area or you can click on the vehicle or driver name to be taken to the details screen.

**Run View**

To view a run simply click on the name of the run and it will appear below the Runs panel.
Across the top of the table you can see the name of the run, vehicle, driver, run time, and total trips scheduled on the run. There are two dropdown menus and six icons on the right of the table:

- **Set Trip As dropdown.** This menu will allow you to mark selected trip(s) with a specific result(s)

```
Cancelled
Complete
Late Cancel
Missed Trip
No-show
Pending
Same Day Cancel
Turned Down
Unmet Need
```

- **Assign To dropdown.** This menu will allow you to move selected trip(s) to a different run or queue.

- **- Publish Manifest.**
  - The dispatcher will have the ability to make as many changes and updates as needed to the manifest without making changes to the app. This button will allow the dispatcher to “push” the manifest and any updates to the drivers RideAVL app. The dispatcher also must click this button for the run to appear in the CAD tab.

- **- Calculate ETA**
- **- Cancel Run**
- **- View Details**
- **- Edit Run**
- **- Add a new trip for the day.**
- **- Print the manifest for this run.**
- **- Close run panel.**
- **- Collapse / Expand the Run Panel.**

Each Run table is made up of thirteen columns.

- **Check box** – This will allow you to select more than one trip at a time.
- **Action** – This details whether or not the line item is either a Pick up (PU) or Drop off (DO). It also tells the dispatcher if the trip is recurring or newly added to the run. If the trip is listed as new, it means that the driver has not been notified of the additional trip.
- **Customer Name**
- **Address** – This is the address associated with that action.
- **Schedule Time** – If the action is a Pick up then it is the pick-up time for the customer. If the action is a Drop off then it is the customer’s appointment time (if one was given in the trip ticket).
**RIDEPILOT USER GUIDE**

- ETA – Estimated Time of Arrival of the vehicle.
- Seat – The current number of seats taken up in the vehicle.
- Tie-Down – The current number of tie-down or wheelchair spots taken up in the vehicle.
- Comments – Trip notes from the trip ticket.
- Result
- Phone Number – Customer’s phone number
- Driver Notified – Whether the driver has been notified of the trip.

**Actions**

- View details of the trip.
- Edit trip information.

The Run panel consists of a list of trips broken up into Pick up and Drop offs. There are multiple different ways to manipulate this information.

To add a new trip directly to the run you can click on the (new trip) button in the run bar. This will take you directly to the **New Trip** ticket. The biggest difference you will see between creating a new trip in this fashion is you will see the run information at the top of the ticket. For example:

**New Trip**

---

To add a trip to the run that is either in the Unscheduled or Standby queue there are two different options to add the trip to the run.

**Using the drop-down box**

1. Expand the Unscheduled/Standby queue by click on the button on the Trips panel bar at the bottom of the screen.
2. Click the check box next to the trip(s) you want to add to a run.
3. Once you have selected the trip(s), click on the drop down menu. This menu will show all runs scheduled for that day.
4. Select the run you want to assign the trip to, and you will get a pop-up question,

   **Are you sure to change the status?**

   Click OK to save the changes or Cancel choose a different run.
5. You will now see the trip in the assigned run.

**Drag and Drop the trip**

1. Click on the Run in the Runs panel you want to add a trip to. The run panel you clicked should appear below the Runs panel.
2. Expand the Unscheduled/Standby queue by click on the button on the Trips panel bar at the bottom of the screen.
3. Find the trip you want to add to the run.
4. Click and hold the mouse anywhere in the row for that trip and drag the trip to the run. The trip will appear in the run where you drop the trip.

Now that you have trips added to the run your run may appear like this.

Once all the trips have been added to the run, a dispatcher has the ability to manipulate the pickup and drop off order of the trips. Similar to the drag and drop option for adding a trip, you can click and drag the different pickups and drop offs into any order that works best. The only stipulation is that you cannot put a drop off ahead of a pick-up for the same trip.

**Trips Panel**

This panel is always located at the bottom of the dispatch tab. In this panel you will find the Unscheduled and Standby queues. Any trip that is created that is not created through a specific run will appear in the Unscheduled Queue. The top bar shows the total amount of trips, unscheduled, scheduled, or trips in the Standby queue.

The top bar also gives the dispatcher the option to switch between Unscheduled and Standby queues.

You can change the queue by using the drop-down menu. The dispatcher can also assign a trip to a specific run by using the drop down menu. For instructions please look above on page 7.

**Indicators**

There are multiple different indicators on the Dispatch tab to help identify issues or to inform the dispatcher of different things.

- **MVI** - This type of indicator can be for either a vehicle or a driver. This indicator means that a non-legal compliance event is past due. To determine the event past due you can either hover over the area with your mouse and a pop up will appear stating the type of event or you can click on the name of the vehicle or driver to be taken to the details page. A vehicle or driver with this indicator can still be assigned to a run.

- **admin User** - This type of indicator can also be for either a vehicle or a driver. This indicator means that there is a legal compliance event that is past due. To determine the event past due you can either hover over the area with your mouse and a pop up will appear
stating the event or you can click on the name of the vehicle or driver to be taken to the details page. A vehicle or driver with this indicator CANNOT be assigned to a run until the event has been completed.

- **New** - The trip is new to the run and the driver has not been notified of the trip being added to the manifest. To remove this icon the dispatcher will have to click on the Driver Notified checkbox associated with either the pick up or drop off for that trip.

- **Mobility?** - This indicator means that the trip ticket does not have a mobility type specified. To correct this, click on the edit icon for the trip and add a mobility type for the customer.

- **Recur** - Shows that either the trip or run is recurring.

- **Veh. Type?** - Shows when a vehicle does not have a vehicle type assigned.
Trips

A Trip defines the details of the trip request, including the start and end locations, the pickup time and an optional appointment time, eligibilities, accommodations, and the size of the group that is traveling.

The Trips tab displays a summary of the entered trips based on the selected filter, and allows you to create new trips, and to edit and cancel existing trips.

<table>
<thead>
<tr>
<th>Trips: Apr 01, 2019 - Apr 30, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Filter</strong></td>
</tr>
<tr>
<td>From Date: 04/01/2019</td>
</tr>
<tr>
<td>To Date: 04/30/2019</td>
</tr>
<tr>
<td>Day of Week: S M T W T F S</td>
</tr>
<tr>
<td>Status: New</td>
</tr>
<tr>
<td>Customer: John Doe</td>
</tr>
<tr>
<td>Building Source: 123 Main St.</td>
</tr>
<tr>
<td>Trip Result:</td>
</tr>
</tbody>
</table>

<p>| <strong>Table view</strong>                    |</p>
<table>
<thead>
<tr>
<th>Trip ID</th>
<th>Trip Type</th>
<th>Driver Name</th>
<th>Date/Time</th>
<th>Location</th>
<th>Pickup Time</th>
<th>Driver Status</th>
<th>Trip Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRI1</td>
<td>Ride</td>
<td>John Smith</td>
<td>04/01/2019</td>
<td>09:00</td>
<td>123 Main St.</td>
<td>Available</td>
<td>Completed</td>
</tr>
<tr>
<td>TRI2</td>
<td>Ride</td>
<td>Jane Doe</td>
<td>04/02/2019</td>
<td>10:00</td>
<td>456 Elm St.</td>
<td>Available</td>
<td>In Progress</td>
</tr>
</tbody>
</table>

The Trips tab is divided into two different sections:

1. Filter panel on the left of the page allows you to filter the trips displayed based on date range, day of the week, customer name, status or run name, and trip result.
2. Table view of the trips.
Trip Filters
Filter can be applied to the trips to only display the trips that match the given criteria (e.g., with a date range, status, trip result, etc.)

To apply a filter:
1. Enter the required filter parameters and click OK at the top of the panel.
2. The table will refresh showing only trips that match the filtering.

To reset the filter:
1. Click the Reset button at the top of the panel.
2. The filter will be reset to the default, in this case the current day, and the table will refresh showing the trips that match the filtering.

Display a Trip
To view the details of any trip from this screen click on the View link in the same row as the trip you want to view.

New Trip
To create a new trip:
1. Click on the button on the top right of the screen.
2. The screen will change and open a new trip ticket. This screen is broken up into different sections.
   a. Trip Essentials
   b. Mobility Configuration
   c. Number of Passengers Tracking
   d. ETA Calculation Related Settings
   e. Eligibility
   f. Fare Configurations
   g. Notes
   h. Other
   i. Useful Info

To see a screenshot of each section, click on the section above.
3. After entering all information click the Save button at the top right of the screen.
4. A pop-up box should appear asking if you would like to create a return trip.
   a. If yes, enter in a new pick up time and appointment time (if applicable) and click the Yes button.
      i. A new trip ticket will appear with the pickup and drop off addresses reversed from the original trip and the new pick up and appointment times entered.
      ii. Review the screen to ensure all information is correct and click the Save button.
   b. If no, click the No button

**Trip Summary**
To view a customer’s trip summary:

1. Click on the Trips Tab
2. Click on the button
3. Enter a Customer’s name in the Name field
4. Click on the button
   a. A pop-up box should appear. On this pop-up you have the ability to search for a customers last and future trips as well as a enter in a date range to search for trips.

**Edit Trip**
To edit an existing trip from the Trips tab:

1. Click on the View link in the same row as the trip you want to edit.
2. When the trip ticket appears click on the Edit button at the top of the screen.
3. After clicking Edit all fields will be displayed in “Edit Mode” allowing the fields to be edited.
4. Click Update after you have revised the necessary fields.

**Create Return Trip**
To create a return trip for an existing trip from the Trips tab:

1. Click on the View link in the same row as the trip you want to create the return for.
2. When the trip ticket appears click on the Create Return button at the top of the screen.
3. A new trip ticket will appear with the pickup and drop off addresses reversed from the original trip.
4. The user will have to enter new pick up and appointment (if applicable) times for the new trip.
5. Review the trip ticket to ensure all fields are correct.
6. Click the Save button to save the new trip.
Clone Trip
To create a clone of an existing trip from the Trips tab:

1. Click on the View link in the same row as the trip you want to create the return for.
2. When the trip ticket appears click on the Clone button at the top of the screen.
3. A new trip ticket will appear and show the pickup and drop off addresses the same as the original trip.
4. The user will need to enter a new date, pick up, and appointment (if applicable) times for the new trip.
5. Once all information is entered review the trip ticket to ensure all other fields are correct.
6. Click the Save button to save the new trip.

Create Subscription Trip
To create a Subscription Trip:

1. Click on the button.
2. Enter information in the Repetitions section of the New Subscription Ticket.

   - a. Enter a Start Date.
   - b. Enter a Stop Date (If Applicable).
   - c. Check the day(s) of the week the trip should be repeated.
   - d. Enter how often, by weeks, the trip should be repeated. By entering one week (as shown above) the trip will repeat every week.
   - e. Enter any comments regarding this trip.
3. Follow other steps regarding creating a trip here.

Please note that any subscription trip that is created will NOT show any live day information until the next live day generates based on the provider’s advanced day scheduling rule.

View Subscription Trip Templates
To view Subscription Trip Templates:
1. Click on the button.
2. A list of all subscription trips will show on the screen.
3. To view a trip template click on the View link in the same row as the trip you want to view.
4. When the subscription trip template appears click on the Edit button at the top of the screen.
5. After clicking Edit all fields will be displayed in “Edit Mode” allowing the fields to be edited.
6. Click Update after you have revised the necessary fields.

**Change Trip Result**

**Cancel Trip**
To cancel a trip from the Trips tab. Use the drop-down menu in the same row as the trip you want to cancel. Within this drop-down menu there are multiple different cancel options;

- Cancelled
- Late Cancel
- Missed Trip
- No Show
- Same Day Cancel

**Complete**
When a trip has been completed as scheduled you can use the drop-down menu to choose the Complete option.

**Other Results**
There are two other results that can be used for a trip, turned down and unmet need. These can be used based on each provider’s rules.

**Delete Trip**
Deleting a trip can only be done by a System Administrator, Provider Administrator, or an Editor. There are only a few instances when a trip should be deleted.

- A trip was created in error.
- The customer has passed away or moved away and FUTURE trips are no longer needed.

*Never delete any past trips, unless the trip was created in error, as this will create errors in reporting.*

**Report**
The report button will print a table version of what is shown on the Trips tab. An example is shown below.
<table>
<thead>
<tr>
<th>Route</th>
<th>Pickup Date</th>
<th>Customer</th>
<th>Phone</th>
<th>Trip Direction</th>
<th>Pickup Address</th>
<th>Pickup Time</th>
<th>Dropoff Address</th>
<th>Appointment Time</th>
<th>Status</th>
<th>Called Back?</th>
<th>Recall</th>
</tr>
</thead>
<tbody>
<tr>
<td>R1</td>
<td>Apr 17, 2018</td>
<td>303.555.2234</td>
<td>801-555-3333</td>
<td>Northbound</td>
<td>445 Main Street, Salt Lake City, UT 84111</td>
<td>8:00am</td>
<td>900 South, 900 West, South Salt Lake, UT 84110</td>
<td>9:00am</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R2</td>
<td>Apr 17, 2018</td>
<td>303.555.4444</td>
<td>801-666-5555</td>
<td>Southbound</td>
<td>100 West 100 South, Salt Lake City, UT 84111</td>
<td>9:00am</td>
<td>100 North 900 West, South Salt Lake, UT 84110</td>
<td>10:00am</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R3</td>
<td>Apr 17, 2018</td>
<td>303.555.6666</td>
<td>801-777-7777</td>
<td>Northbound</td>
<td>600 West 200 South, Salt Lake City, UT 84111</td>
<td>10:00am</td>
<td>200 N Temple, Salt Lake City, UT 84111</td>
<td>11:00am</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R4</td>
<td>Apr 17, 2018</td>
<td>303.555.8888</td>
<td>801-888-8888</td>
<td>Southbound</td>
<td>1200 West 000 South, West Valley City, UT 84010</td>
<td>12:00pm</td>
<td>000 North 000 West, South Salt Lake, UT 84110</td>
<td>12:30pm</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R5</td>
<td>Apr 17, 2018</td>
<td>303.555.9999</td>
<td>801-999-9999</td>
<td>Northbound</td>
<td>300 South 300 West, Salt Lake City, UT 84111</td>
<td>12:30pm</td>
<td>445 Main Street, Salt Lake City, UT 84111</td>
<td>12:30pm</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R6</td>
<td>Apr 17, 2018</td>
<td>303.555.0000</td>
<td>801-000-0000</td>
<td>Southbound</td>
<td>500 South 500 West, South Salt Lake, UT 84110</td>
<td>12:30pm</td>
<td>500 North 500 East, South Salt Lake, UT 84110</td>
<td>12:30pm</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
New Trip Sections – Screenshots and Explanations

Trip Essentials:

- **Customer Name** - Start typing in a name and select an existing customer or click on the New button to create a new customer.
- **Date of Trip**
- **Pick up Time of trip** – Two-digit hour and minute. Click on AM to change from AM to PM and back
- **Appointment Time** - Two-digit hour and minute. Click on AM to change from AM to PM and back. This is optional.
- **Pick up Address** – Defaults to customer’s main address but can be changed.
- **Drop off Address** – Customer’s destination

A new feature of this section is the Lat/Lon or Latitude and Longitude option when there is an address that Google can’t find. When you click on the Lat/Lon checkbox another option will appear on the screen.
To find the Latitude and Longitude you would need to go to maps.google.com and put in the address you are trying to find, then click on the actual spot on the map the Latitude and Longitude will show on the bottom of the screen.

Please keep in mind that if you use the Lat/Lon option, those numbers will appear on manifest. You will need to put in the address information or directions into the trip notes for the driver.

- **Trip Purpose** – Dropdown menu that helps with reporting the type of trips created.

- **Mobility Configuration**: This section details the mobility of the Customer, Guest, Attendant, and Service Animal. This information needs to be completed in full and correctly as it pertains to space on a vehicle.
Number of Passengers Tracking:

<table>
<thead>
<tr>
<th>Number of Passengers Tracking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior</td>
</tr>
<tr>
<td>Disabled</td>
</tr>
<tr>
<td>Low Income</td>
</tr>
</tbody>
</table>

- Senior / Disabled / Low Income – These are fields to enter numbers in based on who is riding with the customer.

ETA Calculation

- **Passenger Load Time** – Estimated time it will take for the customer to come out of their home and be loaded into the vehicle.
- **Passenger Unload Time** – Estimated time it will take for the customer to be unloaded out of the vehicle.
- **Allow Early Pickup** – Will the customer allow to be picked up prior to their scheduled pickup time?

<table>
<thead>
<tr>
<th>ETA Calculation Related Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Passenger Load Time (min)</td>
</tr>
<tr>
<td>Passenger Unload Time (min)</td>
</tr>
<tr>
<td>Allow early pickup?</td>
</tr>
</tbody>
</table>

Eligibility:

<table>
<thead>
<tr>
<th>Eligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicaid Eligible</td>
</tr>
</tbody>
</table>

- Medicaid Eligible – Is the customer eligible for Medicaid?
Fare Configurations:

- **Type**
  - Payment
  - Donation
  - Free
- **Record during**
  - Pre-trip
  - Post-trip
- **Payment** – Amount paid

Notes:

- **Customer Private Notes** – These notes are populated by the customer’s account.
- **Pick up / Drop off Address Notes** – If there are any notes associated with this address they will populate automatically. This field is editable if there is a need.
- **Trip Notes** – Any notes that are specific to this trip.
Other:

- **Called Back** – This is a checkbox used at the provider’s discretion.
- **Trip Result** – To mark the trip Complete, Cancelled, or a version of Cancelled.
- **Funding Source** – Where payment could come for the customer’s trip.
- **Service Level** – Similar to Mobility Type this describes the need of customer and vehicle type.

Useful Info:

- **Direction** – Shows if the trip is either Outbound or Return.
- **Drop off Phone** – Phone number for the drop off location.

Return Trip Pop Up:
After entering the pickup and appointment (optional) times click the Yes button. After clicking the Yes button, the screen will refresh, and a new trip ticket will appear with the addresses reversed and the new times inserted.
Runs

Runs refer to individual routes driven by a vehicle. A single run may include multiple customer trips. The Runs tab displays a table view of run details. In this tab you can create a new run, edit an existing run, cancel a run, and create and view run templates for subscription runs.

The Runs tab is divided into two different sections:

1. Filter panel on the left of the page allows you to filter the runs displayed based on date range, day of the week, vehicle, driver and result
2. Table view of the runs.

Runs Filters

Filter can be applied to the runs to only display the runs that match the given criteria (e.g., with a date range, vehicle, trip result, etc.)

To apply a filter:

1. Enter the required filter parameters and click OK at the top of the panel.
2. The table will refresh showing only runs that match the filtering.

To reset the filter:

1. Click the Reset button at the top of the panel.
2. The filter will be reset to the default, in this case the current day, and the table will refresh showing the runs that match the filtering.

Display a Run

To view the details of any run from this screen click on the View link in the same row as the run you want to view.
New Run
To create a new run:

1. Click on the **New Run** button at the top of the screen
2. The screen will refresh and show the New Run ticket. The new run screen consists of four different sections.
   a. **Name**
   b. **Date and Time**
   c. **Vehicle**
   d. **Driver**

   To see a screenshot of each section, click on the section above.

3. After entering all information click the Save button at the top right of the screen.
4. The screen will refresh showing the new run in the table view of the Runs tab.

Edit Run
To edit an existing run from the Runs tab:

1. Click on the View link in the same row as the run you want to edit.
2. When the run appears click on the Edit button at the top of the screen.
3. After clicking Edit all fields will be displayed in “Edit Mode” allowing the fields to be edited.
4. Click Update after you have revised the necessary fields.

Create Subscription Run
To create a subscription run:

1. Click on the **Create New Subscription Run** button.
2. Enter information in the Repetitions section of the New Subscription Ticket.

   a. Enter a Start Date.
   b. Enter a Stop Date (If Applicable).
   c. Check the day(s) of the week the run should be repeated.
d. Enter how often, by weeks, the run should be repeated. By entering one week (as shown above) the run will repeat every week.
e. Enter any comments regarding this run.

3. Follow other steps regarding creating a run [here].

Please note that any subscription run that is created will NOT show any live day information until the next live day generates based on the provider’s advanced day scheduling rule.

**View Subscription Run Templates**

To view Subscription Run Templates:

1. Click on the **View Subscription Run Templates** button.
2. A list of all subscription runs will show on the screen.

<table>
<thead>
<tr>
<th>View</th>
<th>Time</th>
<th>Start Time</th>
<th>End Time</th>
<th>Vehicle</th>
<th>Driver</th>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Tomlin Local Medical 3</td>
<td>09:00 AM</td>
<td>10:00 AM</td>
<td>Cob 88</td>
<td>Margaret Bentley</td>
<td>Weekly on Tuesdays, Wednesdays, Thursdays, and Fridays</td>
</tr>
<tr>
<td>View</td>
<td>Shuttle 1</td>
<td>07:00 AM</td>
<td>08:00 AM</td>
<td>V1-1</td>
<td>Lisa Liddell</td>
<td>Weekly on Mondays, Tuesdays, Wednesdays, Thursdays, and Fridays</td>
</tr>
<tr>
<td>View</td>
<td>Shuttle 2</td>
<td>10:20 AM</td>
<td>11:20 AM</td>
<td>V1-2</td>
<td>Larry Hansen</td>
<td>Weekly on Mondays, Tuesdays, Wednesdays, Thursdays, and Fridays</td>
</tr>
</tbody>
</table>

3. To view a run template click on the View link in the same row as the run you want to view.
4. When the subscription run template appears click on the Edit button at the top of the screen.
5. After clicking Edit all fields will be displayed in “Edit Mode” allowing the fields to be edited.
6. Click Update after you have revised the necessary fields.

**Cancel Run**

To cancel a run in the Runs tab:

1. Click on the checkbox in the same row as the run(s) you want to cancel.
2. Use the **Apply Action to Selected Runs** dropdown menu to select the cancel option.

These actions will also move any trips scheduled on the now cancelled run will be moved to the Unscheduled Queue.

**Delete Run**

Deleting a run can only be done by a System Administrator, Provider Administrator, or editor. There is only one instance when a run should be deleted.

- A run was created in error.

Never delete any past runs, unless the run was created in error, as this will create errors in reporting.
Changing Start / End Location of Run

If the start and/or end location of a specific run is different than that of the default for the vehicle you can update this information in the Run details screen.

1. Click on the Runs tab.
2. Click on View next to the name of the run that needs the update.
3. Click on the button in the Required for Completion section.
4. Enter in the updated Start / End location of the vehicle in the pop-up box.
5. Click the Ok button to confirm the changes.

Complete a Run

To complete a run:

1. Click on the view link for the run you want to complete.
2. Click the Edit button at the top of the Run details screen.
3. Enter in the following information:
   a. Start Odometer
   b. End Odometer
   c. Actual Start Time (Optional)
   d. Actual End Time (Optional)
4. Click the Update button.
5. Click the Complete button in the Required for Completion section.

These are the general steps for completing a run, you may specify other needs in the Provider Settings.

Distance

Once a run is completed RidePilot will determine the distance driven by the driver (based on the manifest). To view this:

1. Click on the view link for the run you want to view.
2. Scroll down to the Distance section.
New Runs Sections – Screenshots

Name:

Date and Time:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Scheduled Start Time</td>
<td></td>
</tr>
<tr>
<td>Scheduled End Time</td>
<td></td>
</tr>
<tr>
<td>Actual Start Time</td>
<td></td>
</tr>
<tr>
<td>Actual End Time</td>
<td></td>
</tr>
</tbody>
</table>

Vehicle:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vehicle</td>
<td></td>
</tr>
</tbody>
</table>

Driver:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Driver</td>
<td></td>
</tr>
<tr>
<td>Unpaid Break Time</td>
<td></td>
</tr>
<tr>
<td>Paid</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Required for Completion:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Odometer</td>
<td></td>
</tr>
<tr>
<td>End Odometer</td>
<td></td>
</tr>
</tbody>
</table>
Customers

A customer record captures all the relevant information related to an individual or group, including contact details, eligibility and required accommodations.

Before a Trip can be scheduled for a customer, an account must be created for that customer to capture the relevant information.

The Customers tab displays a list of the defined customers, and allows you to create new customers, and update existing Customers.

Customer Search

To search for a specific Customer:

1. Enter the search text in the search textbox above the table and click Search.
2. The table is updated to display only those Customers that match the search text.

Another option to search is by customer last name using the letter links above the table.

Though the customer first name appears first the customer list is sorted alphabetically by last name.

View Customer

To view the customers profile simply click on the name of the customer whose profile you want to view.
New Customer
To create a new customer:

1. Click on the New Customer button.
2. The screen will refresh showing the new customer screen. The screen is made up into nine sections.
   a. Details
   b. Mobility Configuration
   c. ETA Calculation
   d. Addresses
   e. Eligibility
   f. Authorized Providers
   g. Travel Trainings
   h. Funding Authorization Numbers
   i. Donations
   j. Customer Comments
   k. Customer Pop Up Message
3. After entering all information needed click the Save button.
4. The screen should refresh and show the customer in view mode.

New Group
This is similar to adding a new customer, but meant for providers who transport groups of individuals.

Adding an Address
1. Click on the Customers Name.
2. Click the Edit button.
3. Click the Add button in the Address section.
4. A pop up box will appear asking for:
   a. Code (Explained below)
   b. Is this a P.O. Box? If yes follow steps below.
   c. Address
   d. Phone number
   e. Default Trip Purpose
   f. In District (Unused currently)
   g. Notes – Regarding this specific address
5. Click Save on the pop up box.
6. The address will now show in the address section of the customer details.

P.O. Box
When adding a P.O. Box follow the above instructions save click the checkbox asking if the address is a P.O. Box. This will take the geocoded address restriction off, allowing the entry of any address.
Customer Address Codes:
These codes are used when adding addresses to the customer file. An example of the codes are below, but a user can use anything they want.

- CH – Customer Home
- CW – Customer Work
- CD – Customer Doctor
- CS – Customer School
- CC – Customer Church

Inactivate Customer
From the customer profile screen, you can inactivate a customer. This can be done permanently (e.g. if the customer has moved) or for a specific time frame (e.g. if the customer goes on vacation). To inactivate a customer:

1. Click on the name of the customer you need to inactivate.
2. On the customer profile screen click on the **Inactivate** button.
3. A pop up will appear asking what length of time to inactivate the customer.
   a. To permanently inactivate the customer, click on the check box under the question.
   b. To inactivate for a date range put in both a start and end date.
   c. Enter a reason for making the customer inactive.
   d. Click the Save button.
4. After you have clicked the Save button on the pop up a phrase will show next to the customer’s name.
   a. If you marked them permanently inactive it will show, “permanently out of service”.
   b. If you marked them inactive for a date range it will show, “temporarily inactive (start date) to (end date)"

Reactivate Customer
To reactivate a customer that has been previously permanently inactivated:

1. Click on the customer’s name.
2. Click on the **Reactivate** button at the top of the customer details page.
3. A pop-up box will appear, click the OK button to reactivate the customer.

To reactivate a customer that has been inactive for a specific date range:

1. Click on the customer’s name.
2. Click on the button at the top of the customer details page.
3. A pop-up box will appear, click the activate button to reactivate the customer.

**Edit Customer**

To edit the customer:

1. Click on the customer’s name you want to edit.
2. Click the Edit button.
3. All fields will be displayed in “Edit Mode” allowing the fields to be edited.
4. Click Update after you have revised the necessary fields.
New Customer Sections – Screenshots and Explanations

Details:

- **Photo** – Ability to upload an image file (JPG, PNG, TIF) of the customer.
- **First / Middle / Last Name**
- **Gender**
- **Phone Number** – Usually a home number.
- **Alternate Phone** – Usually a work or cell number.
- **Email** – Customer’s email address.
- **Date of Birth** – Customer’s date of birth.
- **Elderly** – The system will determine the customer’s elderly eligibility based on the provider’s settings.
- **Ethnicity**
• Default Service Level – Default vehicle needs. Much like the customer’s mobility.
  No lift/ramp required
  Ramp/Lift required for mobility device
  Wheelchair
  Ambulatory
• Default Funding Source (If applicable) – The customer’s default funding source.
  ADA
  Medicare
  Voucher program miles
  Voucher program per trip
• Private Notes – Notes regarding the customer that are private to the provider
• Public Notes – Notes that appear on the manifest about the customer.

Mobility Configuration: This section sets the mobility of the Customer, Guest, Attendant, and Service Animal. This information needs to be completed in full and correctly as it pertains to space on a vehicle. Any changes made on this screen will affect all future trips for this customer.

<table>
<thead>
<tr>
<th>MOBILITY</th>
<th>CUSTOMER</th>
<th>GUEST</th>
<th>ATTENDANT</th>
<th>SERVICE ANIMAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambulatory</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Ambulatory - 2 seat</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Ambulatory - Ramp required</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Floor animal</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Powerchair</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Scooter</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Unknown</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Wheelchair</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Wheelchair - 2 seat</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Wheelchair - Can Transfer</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Wheelchair - Oversized</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Default Mobility

Mobility Notes

ETA Calculation:

• Passenger Load Time – Estimated time it will take for the customer to come out of their home and be loaded into the vehicle.
• Passenger Unload Time – Estimated time it will take for the customer to be unloaded out of the vehicle.
Travel Training:

This section is used for when a customer has been given travel training.

1. Click the Add button
2. A pop up will appear:
   - Enter a comment regarding the training the customer was given.
3. Click the Ok button to save the information.

Funding Authorization Numbers:

This section is for recording any funding source information, e.g. Medicaid or Medicare.

1. Click the Add button.
2. A pop up will appear:
3. Enter the Authorization Number.
4. Choose the Funding Source.
5. Enter any Contact Information for the Funding Source.
6. Click the Ok button.

Addresses:

Adding addresses to the customer's file. Click here to view how to add an address.

Authorized Providers:

This section will show authorized providers for the customer. Only a system administrator can add additional providers.

Donations:

This section logs donations made by the customer.

1. Click the Add button.
2. A pop-up box will appear:
3. Enter the date.
4. Enter in an amount.
5. Enter any notes regarding the donation.
6. Click the Ok button to save the record.

Customer Comments:

This is a running comment section. This can be used at the provider’s discretion to record interactions between the customer and provider or any other information the provider wants to record. To view the report or all the comments the user can click on the View Customer Comments Report button to show all previous comments.

Others:

This section is used when a message needs to appear any time a customer’s account is pulled up. An example of this would be, “Customer needs to update email.”
Eligibility:

<table>
<thead>
<tr>
<th>Eligibility</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ADA Eligible</td>
<td></td>
</tr>
<tr>
<td>Veteran</td>
<td></td>
</tr>
<tr>
<td>Disabled</td>
<td></td>
</tr>
<tr>
<td>Low Income</td>
<td></td>
</tr>
<tr>
<td>Medicaid</td>
<td></td>
</tr>
<tr>
<td>Senior</td>
<td></td>
</tr>
</tbody>
</table>

The above questions are all Yes/No except for ADA Eligible. If you answer Yes to this question you will be prompted with additional questions.
Drivers

The Drivers tab displays a list of the defined Drivers, and allows you to create new drivers, and update existing drivers.

The main section of the Drivers tab lists:

- **Name** – List of names of the drivers.
- **Paid** – Is the driver paid or volunteer.
- **Active** – Whether the driver is active currently.
- **Available** – Is the driver available for the current day.
- **Overdue Events** – Does the driver have any overdue legal or compliance events?
- **Completed Run Hours This Week** – Scheduled run hours for the driver for the current week (Sunday-Saturday).

Indicators

There are multiple different indicators on the Drivers tab to help identify issues or to inform the dispatcher of different things.

- **MVI** - This type of highlighted indicator can be for either a driver.
  This indicator means that a non-legal compliance event is past due. To determine the event past due you can either hover over the area with your mouse and a pop up will appear stating the event or you can click on the name of the vehicle or driver to be taken to the details page. A driver with this indicator can still be assigned to a run.

- **admin User** - This type of highlighted indicator can also be for either a driver.
  This indicator means that there is a legal compliance event that is past due. To determine the event past due you can either hover over the area with your mouse and a pop up will appear stating the event or you can click on the name of the vehicle or driver to be taken to the details page. A driver with this indicator CANNOT be assigned to a run until the event has been completed.

View Driver

To display the details of a driver simply click on the name of the driver.
Search for a Driver
To search for a driver start typing in the driver’s name into the search bar above the table of drivers.

Create a New Driver
To create a new driver, follow the steps below AFTER a Provider Administrator has created a new user.

Click on the button

1. The screen will refresh and show five different sections
   a. Details
   b. Address
   c. Alternative Address
   d. Emergency Contact
   e. Available Hours

2. After entering all information needed click the Save button.
3. The screen should refresh and show the driver in view mode.

Edit Driver
To edit the details of a driver:

1. Click on the driver’s name you want to edit.
2. Click the Edit button.
3. All fields will be displayed in “Edit Mode” allowing the fields to be edited.
4. Click Update after you have revised the necessary fields.

Inactivate Driver
From the driver profile screen, you can inactivate a driver. This can be done permanently (e.g. if the driver is no longer working with the organization) or for a specific time frame (e.g. if the driver goes on vacation). To inactivate a driver:

1. Click on the name of the driver you need to inactivate.
2. On the driver profile screen click on the Inactivate button.
3. A pop up will appear asking what length of time to inactivate the driver.
   a. To permanently inactivate the driver, click on the check box under the question.
   b. To inactivate for a date range put in both a start and end date.
   c. Enter a reason for marking the driver inactive.
   d. Click the Save button.
4. After you have clicked the Save button on the pop up a phrase will show next to the driver’s name.
a. If you marked them permanently inactive it will show, “permanently out of service”.

b. If you marked them inactive for a date range it will show, “temporarily inactive (start date) to (end date)

Reactivate Driver

To reactivate a driver that has been previously permanently inactivated:

1. Click on the driver’s name.
2. Click on the Reactivate button at the top of the driver details page.
3. A pop-up box will appear, click the OK button to reactivate the driver.

To reactivate a driver that has been inactive for a specific date range:

1. Click on the driver’s name.
2. Click on the Activate button at the top of the driver details page.
3. A pop-up box will appear, click the activate button to reactivate the driver.

Driver Documentation

This is a list of documents associated with a driver. This includes motor vehicle report, driver’s license, insurance card, etc.

To add a document to a driver’s profile:

1. Click on the driver’s name.
2. Click the Add document button.

<table>
<thead>
<tr>
<th>Description</th>
<th>File</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Choose File No file chosen</td>
</tr>
</tbody>
</table>

4. Enter a description.
5. Click the Choose File button and navigate the file you want to upload and click Open
6. The page will refresh and show the document list.

**History Event**

These are events associated with a driver. This could be a commendation from a passenger or ticket. This section is up to the discretion of the provider.

To add a history event:

1. Click on the driver’s name.
2. Click on the Edit button.
3. Click on the **Add history event** button.
4. A pop-up box will appear asking for additional information.
   a. Enter a name for the event.
   b. Enter any notes regarding the event.
   c. Enter the Event Date.
   d. Upload a document associated with the event (if applicable).
   e. If an additional document is needed, click the Add Document button.
   f. Click save when all information is entered.
5. Page will refresh showing the new history event.
Legal Requirements
This is a section where you can track legal requirements for your drivers. To add a Legal Compliance:

1. Click on the Driver name.
2. Click on Edit Driver.
3. Click on the button.
4. A pop-up box will appear with the following information:
   a. Compliance Type – Follow these instructions to add a compliance type.
   b. Name
   c. Notes
   d. Due Date
   e. Compliance Date
   f. Associated documents – Here you can upload a copy of an invoice for the work completed or a copy of a checklist for the work.
5. Click the Save button in the pop-up box.
6. Click the Save button at the top of the vehicle screen.

To view all past requirements, click on the Show Past check box.

Compliance Events
This is a section where you can track legal requirements for your vehicles. To add a Legal Compliance:

1. Click on the Vehicle name.
2. Click on Edit Vehicle.
3. Click on the button.
4. A pop-up box will appear with the following information:
   a. Compliance Type – Follow these instructions to add a compliance type.
   b. Name
   c. Notes
   d. Due Date
   e. Compliance Date
   f. Associated documents – Here you can upload a copy of an invoice for the work completed or a copy of a checklist for the work.
5. Click the Save button in the pop-up box.
6. Click the Save button at the top of the vehicle screen.

To view all past requirements, click on the Show Past check box.
**Driver Availability**

The driver availability section is new to this version of RidePilot. This section can help a provider schedule drivers and keep track of driver time off. A driver will have the ability to set a recurring schedule, but then also have the ability to change their schedule on any given day. The driver will also have the ability to schedule future time off in RidePilot.

To update the driver scheduling follow these steps.

1. Click on the Drivers tab
2. Click on the name of the driver
3. Click on the **Show Availability** button

A new screen will appear that is broken into three different sections, Recurring Availability, Daily Availability, and Planned Leaves.

**Recurring Availability**

This section is where a driver can set their recurring weekly availability.

In this section any hours the driver is available will show as a green bar. Any hours outside of the provider’s operating hours will show as a gray bar. A driver can choose to be available for All Day by clicking on the checkbox next to the day of the week. This will make the driver available for the entirety of the provider’s operating hours. The driver could instead choose a specific time frame, a user with Editor or above permissions would do this by clicking on the **+** sign of the right of the row. This will bring up a pop up menu giving the driver the option to choose the hours they are available. The driver can do multiple different time frames on any given day. A driver can also clear their hours for the day by clicking on the **-** at the right of the row.

**Daily Availability**

This section will allow the driver to update their schedule daily. This section will allow the driver to update their schedule on any given day for the next month.
Similar to the Recurring Availability section the driver has the ability to create multiple time frames for any given day or clear their hours for that day. If the driver has updated the day, but needs to revert the hours back to their normal schedule they can click the button. This button will reset the day back to the drivers recurring schedule.

**Planned Leaves**

In this section the driver can schedule any planned vacation. They can do this by:

1. Clicking on the New button
2. Enter in a Start Date
3. Enter in an End Date
4. Enter in a reason for the time off
5. Click the Save button

When a driver puts in a vacation the driver will be removed from any runs for which they were previously scheduled. Also, planned leaves will show up in the Daily Availability section as a yellow bar.

Once a leave has been planned it will show as below:

To edit a planned leave, click on the edit icon. This will show the same pop up as above.

To delete a planned leave, click on the delete icon.
Availability Forecast
This button at the top of the Drivers tab shows the current days Runs and Drivers as well as a forecast of assigned drivers for the next month.

On the left of the screen it details the number of Runs and the number of Drivers assigned or unassigned to runs. This is broken down by day for one month.

There are 3 different indicators in this section.

- White – All runs have drivers assigned.
- Yellow – All runs have available drivers, but not assigned.
- Red – There are more runs than drivers available or the drivers can not cover the full run times.

A user can click on any date on the left of the screen to show the runs and drivers for that day.

From this section a user can see the run times and drivers’ available hours. A user can also assign drivers to runs from this screen.
New Driver Screenshots and Explanations

Details:

- Photo – Picture of driver
- Alternative Phone Number – Additional phone number for the driver
- Paid – Is this driver paid or unpaid (volunteer)
- Associated User – This is the user name created for the driver by the Provider Administrator

Address: This is the driver’s personal address.

- Notes – Any information regarding the driver’s address (e.g. receives no mail)

Alternative Address: Use this if the driver has an alternate mailing address.
### Emergency Contact:

<table>
<thead>
<tr>
<th>Emergency Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Address</td>
</tr>
<tr>
<td>Phone Number</td>
</tr>
<tr>
<td>Relationship</td>
</tr>
</tbody>
</table>
Vehicles

The Vehicles tab displays a list of the defined vehicles, and allows you to create new vehicles, and update existing vehicles.

The details of each vehicle can be entered and maintained, including maintenance events, preventive maintenance, warranties, legal requirements, and compliance events.

The main section of the Vehicle tab lists:

- Name – List of vehicles.
- Year – Model year of the vehicle.
- Make – Make of the vehicle.
- Model – Model of the vehicle.
- License Plate – License plate number of the vehicle.
- Location – Garage location for the vehicle.
- Active – Is the vehicle active?
- Last Reported Mileage – Mileage from the last completed run for the vehicle.
- Maintenance Overdue – Are there any maintenance events past due?
- Expired Warranties – Are there any expired warranties for the vehicle.

The next section of the Vehicles tab is the Approved Vendors List.

Approved Vendors List

No Approved Vendor List has been uploaded

<table>
<thead>
<tr>
<th>Approved Vendors List</th>
<th>Choose File</th>
<th>No file chosen</th>
</tr>
</thead>
</table>

This is where a provider can upload an Excel spreadsheet with a list of all approved maintenance vendors.

View a Vehicle
To view a vehicle, click on the name of the vehicle.

Search for a Vehicle
To search for a vehicle start typing in the name of the vehicle into the search bar above the table of vehicles.
New Vehicle

1. Click on the [Create Vehicle] button.
2. The screen will refresh showing three sections.
   a. Details
   b. Garage
   c. Additional Information
3. After entering all information needed click the Save button.
4. The screen should refresh and show the vehicle in view mode.

Vehicle Type

To create a new vehicle type:

1. Click on the Provider Settings tab
2. Click on the vehicles link on the left
3. Click on the Provider-specific Vehicle Types link
4. Click on the New button
5. A pop up will appear asking for the name of the new type
6. Click the save button

Vehicle Types Configuration

Once a vehicle type has been created, the next step is to create the different configurations the vehicle has. For instance, a sedan may have 3 seats, but a Paratransit vehicle may have 6 seats and 2 tie down spots for wheelchairs. In this section the user needs to create a configuration for all available options for seating. This may include maximum options for both seats and tie downs. To create a new configuration, follow these instructions:

1. Click on the Provider Settings tab
2. Click on the vehicles link on the left
3. Click on the Provider-specific Vehicle Types link
4. Click on the vehicle type
5. Click on the New Configuration button
6. Enter in the number of seats and tie downs for this configuration.
7. Click the Save button

You will need to follow the above instructions for each configuration option.

Edit a Vehicle

To edit the details of a vehicle:

1. Click on the vehicle name you want to edit.
2. Click the Edit button.
3. All fields will be displayed in “Edit Mode” allowing the fields to be edited.
4. Click Update after you have revised the necessary fields.

Inactivate Vehicle

From the vehicle detail screen, you can inactivate a vehicle. This can be done permanently (e.g. if the vehicle was totaled in an accident) or for a specific time frame (e.g. if the vehicle needs repair). To inactivate a vehicle:

1. Click on the name of the vehicle you need to inactivate.
2. On the vehicle detail screen click on the Inactivate button.
3. A pop up will appear asking what length of time to inactivate the vehicle.
   a. To permanently inactivate the vehicle, click on the check box under the question.
   b. To inactivate for a date range put in both a start and end date.
   c. Enter a reason for marking the vehicle inactive.
   d. Click the Save button.
4. After you have clicked the Save button on the pop up a phrase will show next to the vehicle name.
   a. If you marked them permanently inactive it will show, “permanently out of service”.
   b. If you marked them inactive for a date range it will show, “temporarily inactive (start date) to (end date)"

Reactivate Vehicle

To reactivate a vehicle that has been previously permanently inactivated:

1. Click on the vehicle name.
2. Click on the Reactivate button at the top of the vehicle details page.
3. A pop-up box will appear, click the OK button to reactivate the vehicle.

To reactivate a vehicle that has been inactive for a specific date range:

4. Click on the vehicle name.
5. Click on the button at the top of the vehicle details page.
6. A pop-up box will appear, click the activate button to reactivate the vehicle.

### Vehicle Documentation
This is a list of documents associated with a vehicle. This includes motor vehicle report, vehicle’s license, insurance card, etc.

#### Adding a document
To add a document to a vehicle profile:

1. Click on the vehicle name.
2. Click the button.
4. Enter a description.
5. Click the Choose File button and navigate the file you want to upload and click Open
6. The page will refresh and show the vehicle detail page.

### Maintenance Events
These are one off events e.g. windshield replacement, brakes, or tires. To add an event:

1. Click on the vehicle name.
2. Click the Edit Vehicle button.
3. Click on the Add Maintenance Event button.
4. A pop-up box will appear with the following information:
   a. Service Date – Date work was completed.
   b. Odometer – Mileage of the vehicle at the time of maintenance.
   c. Vendor Name – Where work was completed.
   d. Invoice Date / Number / Amount.
   e. Reimbursable – Is the amount reimbursable.
   f. Services Performed – A description of what was done.
   g. Associated Documents – Here you can upload the invoice and any additional documents associated with the event.
5. Click the Save button in the pop up box.
6. Click the Save button at the top of the vehicle screen.

Preventative Maintenance Logs
This section is where a provider can track all preventative maintenance for their vehicles. The preventative maintenance schedule is based on the vehicle type. Follow these instructions when creating a Schedule Type and/or a Maintenance Event Schedule

Choosing the Maintenance Schedule Type
Now that the Type and Events have been created you have to choose the correct Maintenance Schedule Type for the vehicle. Do this by following these instructions:

1. Click on the Vehicle Tab
2. Click on the name of the vehicle
3. Click on the Edit button
4. Use the Maintenance Schedule Type drop down menu, in the Preventive Maintenance Logs section to choose the correct Schedule Type for the vehicle.
**Scheduling Maintenance Events**

Now that maintenance type has been selected you can then schedule the events with the vehicles.

1. Click on the Vehicle tab
2. Click on the name of the vehicle
3. Click on the Edit button
4. Click on the Add Compliance Event button in the Preventive Maintenance Logs section
5. Select the Scheduled Maintenance you want to create. The name and Due mileage should auto populate
6. Enter any notes
7. Upload any associated documents associated with the event.
8. Click the Save button

**Viewing a Preventive Maintenance Event**

To view a scheduled event, follow these instructions:

1. Click on the vehicle tab
2. Click on the name of a vehicle
3. Click on the name of the event you want to view

**Completing an Event**

To complete an event, follow these instructions:

1. Click on the vehicle tab
2. Click on the name of a vehicle
3. Click on the edit button
4. Click on the name of the event you want to complete
5. Enter in the Compliance Mileage and Compliance Date
6. Upload any documents associated with the event
7. Click the Save button

To view all past requirements, click on the Show Past check box.
**Vehicle and Equipment Warranties**

This is a section where you can keep track of and store warranty information. To add a warranty:

1. Click on the Vehicle name.
2. Click on Edit Vehicle.
3. Click on the **Add warranty** button.
4. A pop-up box will appear with the following information:
   a. Warranty Type – Follow these instructions to add a warranty type.
   b. Description of warranty
   c. Notes
   d. Expiration Date of warranty
   e. Associated documents – Here can upload a copy of the warranty.
5. Click the Save button in the pop-up box.
6. Click the Save button at the top of the vehicle screen.

**Legal Requirements**

This is a section where you can track legal requirements for your vehicles. To add a Legal Compliance:

1. Click on the Vehicle name.
2. Click on Edit Vehicle.
3. Click on the **Add legal requirement** button.
4. A pop-up box will appear with the following information:
   a. Compliance Type – Follow these instructions to add a compliance type.
   b. Name
   c. Notes
   d. Due Date
   e. Compliance Date
   f. Associated documents – Here you can upload a copy of an invoice for the work completed or a copy of a checklist for the work.
5. Click the Save button in the pop-up box.
6. Click the Save button at the top of the vehicle screen.

To view all past requirements, click on the Show Past check box.
Compliance Events

This is a section where you can track legal requirements for your vehicles. To add a Legal Compliance:

1. Click on the Vehicle name.
2. Click on Edit Vehicle.
3. Click on the Add compliance event button.
4. A pop-up box will appear with the following information:
   a. Compliance Type – Follow these instructions to add a compliance type.
   b. Name
   c. Notes
   d. Due Date
   e. Compliance Date
   f. Associated documents – Here you can upload a copy of an invoice for the work completed or a copy of a checklist for the work.
5. Click the Save button in the pop-up box.
6. Click the Save button at the top of the vehicle screen.

To view all past requirements, click on the Show Past check box.
New Vehicle Screenshots and Explanations

Details:

- Initial Mileage – Mileage of the vehicle on the first day of use in your program.
- Seating Capacity – Vehicle Type
- Vehicle should appear on vehicle report

Garage:

Additional Information:

- Ownership – Dropdown menu where you can select either Agency or Volunteer
- Responsible Party
- Registration Expiration Date
- Insurance Coverage – Name of the company, policy number, and contact information for the insurance.
- Accessibility Equipment – Any information regarding a lift or ramp for accessible equipment.
Map

In this tab a user will be able to show all published runs, past and future routes, and all event points. When this tab is clicked a new tab will appear in the browser. This screen includes the filtering options, to the right, and a map of Utah.

The map will show the different routes and event points (Pickup and Drop off).

The user will have the ability to click on a Pickup or Drop off location for a tool tip describing the event. This tip gives the title of the Event, address of the event, scheduled time, and ETA.

A user can use this screen to show where a driver is at any given moment by clicking on the car icon.

By clicking on the button it will show the pickup and drop off events for that run.

Clicking on the will move the map to the center of the run.

Clicking on the will open the chat window with the driver of the run.
Chat Window

To open the chat window between a driver and click on the icon next to the run name. By clicking on this a pop-up window will appear.

A user can type in their message in the message area and then click Send to send the message to the driver. The user also has the ability to select a preset message by clicking on the Quick Response drop down menu.

The Quick Response drop down menu consists of messages that have been entered in the Provider Settings. Follow these steps to enter new messages:

1. Click on Provider Settings.
2. Click on the General link.
3. Click on Open Provider Lookup Table Page in the Lookup Table section.
4. Click on the Common Dispatcher Message option in the drop-down menu.
5. Click on the Add button.
6. A pop up will appear. Enter the message you want included in the drop down menu.
7. Click on the Ok button.

To update the Quick Responses in the RideAVL app you follow the same steps as above with the only difference being step 4 instead of selecting on Common Dispatcher Message you select Common Driver Message.
RideAVL Mobile App

The RideAVL Mobile APP is the electronic manifest and communication system for drivers. This section will show the different screens and options within the APP.

All drivers will have Users created in RidePilot. The driver will use their user name and password to sign into the APP.

Once logged in the driver will see the run(s) assigned to them for that day only.

**Manifest Display**

To open a run the driver simply needs to tap on the run to see their manifest. If a driver is assigned to more than one run they will have the ability to choose which run they want to open, by tapping on the run.

Once open the drivers manifest will show the Pre-Trip Inspection, pickup, drop off, and Finish the Run events.

The screen also shows the next event, current time, scheduled time of the event, ETA to the event, and the time Gap to the next event.

On any screen the user can tap on the three bars, at the top of right of the screen, to access the menu options.

This menu shows the drivers name, opens the Chat window, activates the Emergency notification, gives details about the APP, and allows the driver to Sign Out.
Chat Window (APP)
When the driver taps the Chat link a chat window will open. This will allow the driver to chat with the dispatchers. This chat window will use the built-in keyboard functions based on the device used.

On this screen there are four lines at the bottom right of the screen. This pop-up menu allows the driver to choose a preset response back to the dispatcher.

Emergency Button
This button sends a pop-up message to any dispatcher that has RidePilot opened at that time. The message gives the driver’s name and states that they have an emergency. Below is an example of the pop up seen by dispatchers.

Once the dispatcher has seen the message they can click the Got it button. When a dispatcher clicks this button a “push” notification will be sent to the driver’s device informing them the emergency message has been received and who it was seen by. This message will appear in forefront of the RideAVL app. The driver will then have to Dismiss the notification before they are able to move on.
Pre-Trip Inspection
The pre-trip inspection is always the first event of any run.

This screen shows:

- The garage address.
- A list of Yes/No questions. These questions are set at the provider admin level. Follow these instructions how to create these questions.
- Notes field for the driver to make any notes regarding the vehicle that are not included in the questions.
- Start Odometer – This is where the driver will enter the odometer at the beginning of the run. This information is automatically stored in the Run details screen.
- To start the run and move on to the first pickup of the day, tap on the Start Run button.

A driver must complete the questions and enter in the odometer before they can start the run.
**Pickup Screens**
Once the run has been started the next screen shown is a pickup.

This screen shows:
- The customer’s name.
- The pickup address.
- The Depart button.

After tapping the Depart button the following screen appears.

This screen shows:
- A link to Google Maps. This will open Google Maps with both the current location and the destination filled out.
- An Undo button in case the previous button was tapped on accident.
- The Arrived button.

Once the Arrived button has been tapped the user is given two options, Picked Up or No Show. This will show the Dispatcher the result of the event. When Picked Up is tapped, if applicable, the driver will then be prompted for either a donation or a fare.

If No Show is tapped or after the driver enters in a donation/fare they will then be prompted to proceed to the next stop.
**Drop off screens**

The drop off screens are very similar to the pickup screens.

The difference between the two sets of screens is the Dropped Off button at the end of the event. Also based on provider set up a donation or fare might be collected at dropoff.

**Finish the Run**

The final screen in manifest will ask the driver to enter in the odometer reading once they get back to the garage location.
Reports

The Reports tab is broken up into two new sections, New Reports and Previous Reports.

**Previous Reports**

The Previous Reports dropdown includes all the reports available with previous versions of RidePilot. This dropdown menu includes the following reports:

<table>
<thead>
<tr>
<th>Addresses*</th>
<th>Age and Ethnicity</th>
<th>Cab Log</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clackamas County Transportation Consortium Summary Report</td>
<td>Customer Callbacks*</td>
<td></td>
</tr>
<tr>
<td><strong>Customer Trips in Range</strong></td>
<td><strong>Customer-Trips</strong>*</td>
<td><strong>Customer (Mail Merge)</strong>*</td>
</tr>
<tr>
<td>Customers*</td>
<td>Daily Manifest</td>
<td>Daily Manifest by Half Hour</td>
</tr>
<tr>
<td><strong>Daily Manifest by Half Hour with Cab Summary</strong></td>
<td><strong>Daily Manifest with Cab Summary</strong></td>
<td></td>
</tr>
<tr>
<td>Database Tracking*</td>
<td>Day’s Trips Report</td>
<td>Donation Tracking*</td>
</tr>
<tr>
<td><strong>Donations</strong></td>
<td><strong>Driver Compliances</strong>*</td>
<td><strong>Driver Manifest</strong></td>
</tr>
<tr>
<td>Drivers (Mail Merge)*</td>
<td>Drivers*</td>
<td>Export Trips as CSV</td>
</tr>
<tr>
<td><strong>Monthly Miscellaneous Data</strong></td>
<td><strong>Providers</strong>*</td>
<td><strong>Runs</strong>*</td>
</tr>
<tr>
<td>Service Summary</td>
<td>Trip Summary (Mail Merge)*</td>
<td>Trips*</td>
</tr>
<tr>
<td><strong>Vehicles Compliances</strong>*</td>
<td><strong>Vehicles Summary</strong>*</td>
<td><strong>Vehicles</strong></td>
</tr>
<tr>
<td>Vehicles*</td>
<td>Verify Runs</td>
<td>Verify Trips</td>
</tr>
</tbody>
</table>

*Denotes previously updated reports.

**New Reports**

The New Reports dropdown includes (an explanation of each report will follow the table of reports):

<table>
<thead>
<tr>
<th>Cancellations, No Shows, Missed Trip</th>
<th>Customer Donation Report</th>
<th>Customers Report</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Inactive Driver Status Report</strong></td>
<td><strong>Ineligible Customer Status Report</strong></td>
<td><strong>Manifest</strong></td>
</tr>
<tr>
<td>Missing Data Report</td>
<td>National Transit Database (NTD)</td>
<td>Pre-Trip Inspection</td>
</tr>
<tr>
<td><strong>Provider Common Location Report</strong></td>
<td><strong>Provider Service Productivity Report</strong></td>
<td><strong>Vehicle Monthly Service Report</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Vehicle Report</td>
</tr>
</tbody>
</table>

Each report has a summary and detailed report. Most reports can be viewed or downloaded in the following format HTML, PDF, or CSV. There are a few exceptions to this:

- Manifest – does not include a CSV version
- Cancellations/No Show/Missed Trip – CSV only
- National Transit Database (NTD) – CSV only
A user can also save the parameters for any given report by clicking on the **Save** button next to the **Run** button. Below is an example of the **New Report** screen.

When you click the **Save** button a pop up will appear asking for a Report Name and, if applicable, a date range type. The new report will then show in the **New Reports** dropdown menu.

- **Cancellations, No Shows, Missed Trip**
  - **Summary** - Will have the ability to list total number of riders (if applicable), within subcategories of passenger’s types and mobility devices including individually listed Cancellation types, Turn downs/unmet needs.
  - **Detailed** - Will provide all the above list requirements but include a listing of passenger’s names listed in chronological date order.

- **Customer Donation Report**
  - **Summary** - Will list donations per customer received and dates given. Will give a sum of all donations given.
  - **Detailed** - Will list how many unlinked trips were provided to customer.

- **Customers Report**
  - **Summary** - Will list total number of active customers by mobility device and eligibility criteria.
  - **Detailed** - Will list all active customers by name, ID number, birthdate, addresses, and phone numbers, include eligibility criteria, funding sources, mobility device, and any shared providers.

- **Driver Compliance Report**
  - **Summary** - List all active drivers in alphabetical order including ID numbers with hire date. This shall include all listed legal compliance requirements and due dates, and compliance dates for license, medical certifications and insurance if applicable. Should default to current calendar year if no date range is inputted.
  - **Detailed** - Include all the data in summary report and include a listing of all training requirements, due dates, and compliance dates. Should default to current calendar year if no data range is inputted.

- **Driver Monthly Service Report**
  - **Summary** - Will list total hours, number of drivers providing service who were Volunteer vs Paid.
  - **Detail** - Will list individual drivers (if applicable) and hire date, how many days worked, each run number completed, total number of hours scheduled vs actual worked, and Volunteer vs Paid.
• **Driver Report**
  o **Summary** - List all active drivers in alphabetical order with ID numbers, phone numbers, hire date, and summary of total number of volunteer vs paid.
  o **Detailed** - Include all data in Summary report and include Birthdates, Addresses, secondary phone number, business & personal email addresses including all emergency contact information.

• **Inactive Driver Status Report**
  o List of permanent inactive drivers with reason comment include driver phone numbers.
  o List of temporary inactive drivers with reason comment and inactive dates, include driver phone numbers.

• **Ineligible Customer Status Report**
  o **Summary** - List of all temporally ineligible customers beginning/ending date and reasons comment.
  o **Detailed** - List all permanent ineligible customers with data and reason comment.

• **Manifest** – Daily driver manifest

• **Missing Data Report** - Identifies what data a specific Run is missing, whether it’s a beginning/ending mileage, driver or vehicle assignment to enable the run to be marked as complete.

• **National Transit Database (NTD)** – This report was created based on what UTA has to fill out for the NTD. This report includes:
  o **Number of Vehicles in Service**
  o **Unlinked Passenger Trips**
  o **Days Operated**
  o **Actual Miles / Hours**
  o **Revenue Miles / Hours**
  o **Deadhead Miles / Hours**
  o **Passenger Miles**

• **Pre-Trip Inspection Report** – This report will detail questions that were marked no on the RideAVL pre-trip inspection, during a given time frame and whether that question was marked as either Flagged and/or Mechanical in the lookup table.

• **Provider Common Location Report** - List of all common locations for the specific provider. This will include category codes, address and phone numbers (if applicable).

• **Provider Service Productivity Report**
  o **Summary** - Will provide the total number of unlinked customer ride counts, sorted by customer types such as seniors, disabled, etc... The summary will also include a total of how many trips preformed to transport all the riders. This report will also provide total vehicle miles, and total vehicle hours.
  o **Detail** - Will include all the data in the summary report with the addition of the following: mobility aides, customer ride counts by trip purpose, customer ride counts by ethnicity, and customer ride counts by eligibility rules. The report will separate the detailed data by day.

• **Vehicle Monthly Service Report**
• **Summary** - Will show the number of vehicles were used. List of total miles driven per vehicle and the sum of all vehicles.

• **Detail** - Would separate the data by day. List vehicle numbers include daily reported mileage and number trips. Each day would include beginning and ending mileage for each vehicle. Each day will separate revenue and non-revenue miles.

**Vehicle Report**

• **Summary** - Will list all valid vehicle identifiers, license plate number, and descriptions, with last recorded mileages. Also included will be a listing of all legal vehicle requirements, due dates and completed/compliance dates. If vehicle is marked temporary inactive include beginning date and reason field. Should default to current calendar year if no date range is input.

• **Detailed** - Includes all data in the summary report. Add a list of all currently due preventative maintenances, due dates, mileages, completed/compliance dates. Should default to current calendar year if no date range is input. Should also include all repairs and the associated cost of those repairs. List of all warranty information. Total mileage per vehicle (using current mileage subtracted by initial mileage). All comments associated with the vehicles.
Cab

This tab is an optional tag that can be turned on in the Provider Settings tab in the General section.

Instead of using one of its own vehicles, a provider may schedule a private taxi to handle a trip for a customer.

The Cabs tab displays a summary of the number of trips scheduled for private taxi by day.

Week Filter

By default, cab trips are shown for the current week. To display cab trips for a different week, use the date control at the top of the page:

Click the left and right arrows to retreat or advance the displayed week. Click to redisplay the current week.

Cab Trips by Day

To display the trips scheduled to be handled by a private taxi on a specific day, click the hyperlink for the appropriate day. This will take you to a screen where you can further review or edit the cab trips for the selected day.
Provider Settings

In this section a System Administrator and Provider Administrator can edit settings regarding a provider.

Within this screen there are seven sections.

- Profile
- General
- Users
- Drivers
- Vehicles
- Addresses
- Customers

Profile

To edit this information, click on the Edit button.

This is the basic provider information that include.

Details

This is the basic information for the provider.

Primary Contact

This is the primary contact for the provider.

Business Address

This is the physical address of the provider.
Mailing Address

<table>
<thead>
<tr>
<th>Mailing Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Name</td>
</tr>
<tr>
<td>Address</td>
</tr>
<tr>
<td>City/State/Zip</td>
</tr>
<tr>
<td>Notes</td>
</tr>
</tbody>
</table>

General
These are the basic settings for a provider.

Configure Operating Hours
These are the hours that the provider is open.

<table>
<thead>
<tr>
<th>Available Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday</td>
</tr>
<tr>
<td>Monday</td>
</tr>
<tr>
<td>Tuesday</td>
</tr>
<tr>
<td>Wednesday</td>
</tr>
<tr>
<td>Thursday</td>
</tr>
<tr>
<td>Friday</td>
</tr>
<tr>
<td>Saturday</td>
</tr>
</tbody>
</table>

Lookup Tables
Configure Provider Lookup Tables. In this screen you can add ADA questions (Yes/No), a Common Dispatcher Message, a Common Driver Message, a Funding Source, Vehicle Inspection questions (Yes/No), or a Vehicle Warranty.

To add an additional Funding Source:

1. Click on the Provider Settings tab.
2. Click on the General link on the left of the screen.
3. Click on the Open Provider Lookup Table Page link.
4. Use the drop-down menu to select Funding Source.
5. Click the Add button.
6. A pop-up box will appear asking for a value.
7. Enter the value you want to add.
8. Click the Ok button.

In this section a user can also choose if a given Funding Source is NTD reportable, by checking or unchecking the check box next to the specific Funding Source.
To add an additional ADA Eligibility Question:

1. Click on the Provider Settings tab.
2. Click on the General link on the left of the screen.
3. Click on the Open Provider Lookup Table Page link.
4. Use the drop-down menu to select ADA Eligibility Question.
5. Click the Add button.
6. A pop-up box will appear asking for a value.
7. Enter the value you want to add. Ensure this is a Yes/No question.
8. Click the Ok button.

To add a Vehicle Inspection (Yes/No) Questions:

1. Click on the Provider Settings tab.
2. Click on the General link on the left of the screen.
3. Click on the Open Provider Lookup Table Page link.
4. Click the Add button.
5. A pop-up box will appear asking for a value.
6. Enter the value you want to add.
7. Click the Ok button.

Once that has been completed the user can select whether or not the question is to be flagged or mechanical in nature. If a question is marked as either Flagged or Mechanical any “No” answer in the RideAVL Pre-Trip Inspection WILL show in the Pre-Trip Inspection Report. If the question is neither flagged nor mechanical a “No” answer in the RideAVL Pre-Trip Inspection will NOT show in the Pre-Trip Inspection Report.

To add an additional Vehicle Warranty:

8. Click on the Provider Settings tab.
9. Click on the General link on the left of the screen.
10. Click on the Open Provider Lookup Table Page link.
11. Use the drop-down menu to select Vehicle Warranty.
12. Click the Add button.
13. A pop-up box will appear asking for a value.
14. Enter the value you want to add.
15. Click the Ok button.

**System-Wide Lookup Table Entries**

These include Capacity Type, Common Dispatcher Message, Common Driver Message, Eligibility, Ethnicity, Funding Source, Mobility Requirement, Service Level, Trip Purpose, Trip Result, and Vehicle Inspection (Yes/No). Only a System Administrator can add entries into this table, but a Provider Administrator is able to view the contents of the tables. The Trip Results should only be edited by a System Administrator. A Provider Administrator can hide values by clicking on the value they want to hide and then clicking the button Hide Value.

To add an additional Capacity Type:
1. Click on the System Admin Tab.
2. Click on Lookup Tables.
3. Select Capacity Type from the drop-down menu.
4. Click Add.
5. Enter in the name of the new capacity type in the pop-up box.
6. Click the Ok button.

To add an additional Eligibility:

1. Click on the Provider Settings tab.
2. Click on the General link on the left of the screen.
3. Click on the Open System Lookup Table Page link.
4. Use the drop-down menu to select Eligibility.
5. Click the Add button
6. A pop-up box will appear asking for a value and description.
7. Enter the value and description you want to add.
8. Click the Ok button.

To add an additional Ethnicity:

1. Click on the Provider Settings tab.
2. Click on the General link on the left of the screen.
3. Click on the Open System Lookup Table Page link.
4. Use the drop-down menu to select Ethnicity.
5. Click the Add button
6. A pop-up box will appear asking for a value.
7. Enter the value you want to add.
8. Click the Ok button.

To add an additional Funding Source:

1. Click on the Provider Settings tab.
2. Click on the General link on the left of the screen.
3. Click on the Open System Lookup Table Page link.
4. Use the drop-down menu to select Funding Source.
5. Click the Add button
6. A pop-up box will appear asking for a value.
7. Enter the value you want to add.
8. Click the Ok button.

To add an additional Mobility Requirement:

1. Click on the Provider Settings tab.
2. Click on the General link on the left of the screen.
3. Click on the Open System Lookup Table Page link.
4. Use the drop-down menu to select Mobility Requirement.
5. Click the Add button
6. A pop-up box will appear asking for a value.
7. Enter the value you want to add.
8. Click the Ok button.

To add an additional Service Level:

1. Click on the Provider Settings tab.
2. Click on the General link on the left of the screen.
3. Click on the Open System Lookup Table Page link.
4. Use the drop-down menu to select Service Level.
5. Click the Add button
6. A pop-up box will appear asking for a value.
7. Enter the value you want to add.
8. Click the Ok button.

To add an additional Trip Purpose:

1. Click on the Provider Settings tab.
2. Click on the General link on the left of the screen.
3. Click on the Open System Lookup Table Page link.
4. Use the drop-down menu to select Trip Purpose.
5. Click the Add button
6. A pop-up box will appear asking for a value.
7. Enter the value you want to add.
8. Click the Ok button.

**ETA Calculation Related Settings**

These settings will help the system calculate the ETA of a run.

![ETA Calculation Related Settings](image)

**Advanced Day Scheduling**

This setting will allow you to schedule runs / trips up to either 7, 14, or 21 days in advance. It also is the length of time that any recurring/subscription runs/trips will automatically schedule in the future. It is encouraged to choose 7 or 14 days.
Run Tracking
You can enable/disable the ability to see trip and passenger tracking for each run. This information is in addition to the constant tracking for reporting of these.

Cab
With this setting you can turn off/on the Cab tab.

Scheduling
This is the ability to schedule trips.

There would be no reason to turn this off.

Fields required for a Run to be completed
In addition to the Start and End odometer of a vehicle a provider can choose to select whether the driver is either Paid / Unpaid or if there was a driver break included.

Region Boundaries
As a provider you can create a box around your service area. You will need the latitude and longitude of both the Northwest and Southeast corner of your boundaries.

Users
In this section you can view the list of users associated with a provider, add another user, and update current user information.

Creating a New User
1. Click on the Provider Settings Tab.
2. Click on the Users link on the left of the screen.
3. Click on the Create User button.
4. Enter First and Last Name.
5. Enter a Username (This will be used by the user to log into RidePilot)
6. Set the user’s permission (role) level. The options are:
   a. System Administrator (Can only be assigned by another System Administrator)
   b. Provider Administrator – Able to make updates to provider settings.
   c. Editor – Able to make updates to all customer, driver, and vehicles. Used primarily for Dispatchers.
   d. User – Able to create trips and update manifest information. Used primarily for Drivers.
7. Enter the user’s address.
8. Enter security questions, if the user wants to use them. These are not required.
9. Click the Save button.

**Updating User Information**
10. Click on the Provider Settings Tab.
11. Click on the Users link on the left of the screen.
12. Click on the user’s name that you want to update.
13. Click the Edit button to make the fields editable.

At this point you can update the user’s first or last name, username, email, and/or permissions (role). In this section an address can be added for the user.

**Security Questions**
RidePilot has the option to use security questions when a user has forgotten their password. To add or edit security questions follow these steps:

1. Click on the Provider Settings Tab.
2. Click on the Users link on the left of the screen.
3. Click on the user’s name that needs to add or edit security questions.
4. Click on the Edit button.
5. Click the **Add a Security Question** button.
6. A pop up will show asking for a question and answer.
7. Click the Ok button to save the question and answer.
8. Click the Update button to save all new information.

**Reset User Password**
If a user needs to have their password reset, follow these steps:

1. Click on the Provider Settings Tab.
2. Click on the Users link on the left of the screen.
3. Click on the user’s name.
4. Click on the **Reset Password** button.
5. Enter a new password and confirm the new password.
6. Click the Update button
Once the password is changed the user will need to log into the system using that password and then change their password themselves.

**How to Change a Password**
If a user needs to change their password, follow the instructions below:

1. The user needs to log into RidePilot.
2. Once the user has logged into RidePilot a “Change Password” link will show at the top right of the screen.
3. Click on the Change Password link.
4. Enter the current password, enter a new password, confirm the new password, and finally click Update to save the new password.

**Update User Email**

1. Click on the Provider Settings Tab.
2. Click on the Users link on the left of the screen.
3. Click on the Change Email link for the email address you want to change.
4. Screen will refresh and show an option to enter a new email address.
5. Click the Submit button to save the new email.

**Change Users Role**

1. Click on the Provider Settings Tab.
2. Click on the Users link on the left of the screen.
3. On the right of the screen in the same row as the users name there is a drop-down box. Use this drop-down box to select a new role for the user.
4. Click the Change Role button to save the new role.

**Delete a User**
To delete a user, click the red delete link at the far right of the screen on the same row as the user’s name.

> *Never delete any user, unless the user was created in error, as this will create errors in reporting.*

**Drivers**
In this section you can create and update provider specific driver requirements, e.g. first aid trainings, driver trainings, and/or sensitivity trainings. To create or update requirements follow these steps:

**Driver Availability Settings**
These settings match the provider available hours. Then the provider admin can update the interval for the Availability Chart. The provider admin can also change how far in advance the forecasting is
Create New Provider Specific Driver Requirement
1. Click on the Provider Settings Tab.
2. Click on the Drivers link on the left of the screen.
3. Click on the Provider-specific Driver Requirements link.
4. Click on the Create Driver Requirement button.
5. Screen will refresh and enter the following information:
   a. Name of requirement.
   b. Is the requirement legal?
   c. Is the requirement reoccurring?
6. Click the Submit button.
7. Screen will refresh showing the new requirement in view mode.

Edit a Provider Specific Driver Requirement
1. Click on the Provider Settings Tab.
2. Click on the Drivers link on the left of the screen.
3. Click on the Provider-specific Driver Requirements link.
4. Click on the name of the requirement that needs editing.
5. Click the Edit button.
6. Edit the information needed.
7. Click the Update button to save the changes.

Vehicles
In this section you can create and update provider specific vehicle requirements, create and update vehicle maintenance schedule types, create and update vehicle warranties.

Create New Provider Specific Vehicle Requirement
Vehicle Requirements are considered items like safety and emission inspections.

1. Click on the Provider Settings Tab.
2. Click on the Vehicle link on the left of the screen.
3. Click on the Provider-specific Vehicle Requirements link.
4. Click on the Create Vehicle Requirement button.
5. Screen will refresh and enter the following information:
   a. Name of requirement.
   b. Is the requirement legal?
   c. Is the requirement reoccurring?
6. Click the Submit button.
7. Screen will refresh showing the new requirement in view mode.

**Edit a Provider Specific Vehicle Requirement**

1. Click on the Provider Settings Tab.
2. Click on the Vehicle link on the left of the screen.
3. Click on the Provider-specific Vehicle Requirements link.
4. Click on the name of the requirement that needs editing.
5. Click the Edit button.
6. Edit the information needed.
7. Click the Update button to save the changes.

**Schedule Type**

A provider administrator can add different preventative maintenance schedule types by doing the following:

1. Click on the Provider Settings tab
2. Click on Vehicles on the left
3. Click on Configure Vehicle Maintenance Schedule Types
4. Click on the New button
5. A pop up asking for a name will appear
6. Click the Save button to save the new type

You can also edit any of previously created maintenance types by clicking on the Edit button, at the right side of the row, for the event. The same pop up will appear and you can edit any of the above information.

**Maintenance Event Schedules**

Once you have created a schedule type you can then set up different maintenance events.
1. Click the name of the schedule type you want to create events for
2. Click on the New button
3. A pop up will appear asking for information
   a. Name
   b. Mileage when the event is due
   c. Ability to upload an inspection document associated with this event.
   d. Click the Save button

You can also edit any of previously created maintenance events by clicking on the Edit button, at the right side of the row, for the event. The same pop up will appear and you can edit any of the above information.

**Vehicle Maintenance Schedule Types**

In this section you can create specific preventative maintenance events for different vehicle types. To create a vehicle type, follow these steps:

1. Click on the Provider Settings Tab.
2. Click on the Vehicle link on the left of the screen.
3. Click on the Provider-specific Vehicle Maintenance Schedule Types.
4. Click on the New button on the right of the screen.
5. A pop up will appear asking for the name of the vehicle type. These are typically sedan, minivan, 12 passenger van, bus, etc.
6. Click the Save button.

Once the vehicle type is created the maintenance events can be created. These are typically events such as, oil changes, belts, tune ups, etc.

Follow these steps to create the events:

1. Click on the Provider Settings Tab.
2. Click on the Vehicle link on the left of the screen.
3. Click on the Provider-specific Vehicle Maintenance Schedule Types.
4. Click on the name of the vehicle you want to create an event for.
5. Click on the New button on the right of the screen.
6. A pop up will appear asking for a Name, Mileage (how often is the event due), and the ability to upload an inspection requirement sheet to the event.
7. Click the Save button
To edit any event that was previously created follow the above steps through step 4, then click on the Edit button for the event you want to edit.

**Create a Vehicle Warranty**
These are any warranties associated with the vehicle e.g. brakes, windshield, or new vehicle. To create a warranty, follow these instructions:

1. Click on the Provider Settings Tab.
2. Click on the Vehicle link on the left of the screen.
3. Click on the Vehicle Warranties Lookup Table.
4. Screen will refresh. Ensure that the dropdown box states Vehicle Warranty.
5. Click the Add button.
6. A pop up will show asking for a value (name of the warranty).
7. Click the Ok button.

**Edit a Vehicle Warranty**
1. Click on the Provider Settings Tab.
2. Click on the Vehicle link on the left of the screen.
3. Click on the Vehicle Warranties Lookup Table.
4. Screen will refresh. Ensure that the dropdown box states Vehicle Warranty.
5. Click the name of the warranty you want to update.
6. Click the Edit button.
7. A pop up will show asking for a value (name of the warranty).
8. Click the Ok button.

**Addresses**
This section includes a list of provider common addresses. These addresses are available to all customers for that provider. Example of these types of addresses would be dialysis centers, hospitals, grocery stores, and churches.

**Create New Provider Common Address**
To create a new provider common address, follow these instructions:

1. Click on the Provider Settings Tab.
2. Click on the Addresses Link on the left.
3. Click on the button.
4. A pop up will appear asking for the following information:
   a. Type (e.g. Doctor, Church, Grocery)
   b. Address Name – Name for the address (e.g. Dialysis, Wal-Mart)
   c. Address
   d. Phone Number (Phone number for the address)
   e. Default Trip Purpose (Address specific)
f. In District (Not used currently)
g. Notes – Any note regarding this specific address (e.g. pull around back, don’t park on street)
5. Click the Save button

**Edit a Current Provider Common Address**

1. Click on the Provider Settings Tab.
2. Click on the Addresses Link on the left.
3. Click on either the address name or the edit link on the right of the screen, for the address information you want to edit.
4. Enter in the information needing to be updated.
5. Click the Save button

Please note that the address cannot be updated due to possible report errors. If the address was incorrectly entered it can be deleted (if not used previously) otherwise another address needs to be created.

**Deleting a Provider Common Address**

Please note that if an address has been used it should not be deleted.

1. Click on the Provider Settings Tab.
2. Click on the Addresses Link on the left.
3. Click on the Name of the Address. If the address has not been used a red delete button will appear in the top right of the screen. If it has been used this will say merge. Merge will remove the address from the list, but not from the database.

**Customers**

In this section you can enter in the age eligibility required for your service (if applicable). You can also configure any ADA questions needed for your service.

**Age Eligibility**

To update the eligible age for your service:

1. Click on the Provider Settings Tab.
2. Click on the Customers link on the left.
3. Enter in the eligible age in the given field.
4. Click the Update button to save the age.

**Configure ADA Questions**

These questions will only appear if you choose “Yes” to the customer is ADA eligible in the customer profile. To configure any ADA questions, follow these instructions:

1. Click on the Provider Settings Tab.
2. Click on the Customers link on the left.
3. Click on the ADA Question Lookup Table link.
4. A new screen will appear. Ensure that the drop-down menu shows “ADA Eligibility Question (yes/no)”
5. Click the Add button.
6. A pop-up box will appear asking for a value. This value will be a question that requires a Yes or No answer.
7. Click the Ok button.
System Administrator
This tab is restricted only to the System Administrator role.

Application Settings
There are two settings that can be manipulated in this section, password archive count and expire password after.

Password Archive Count
Password archive count is the number of passwords that the system stores and doesn’t allow the user to use. For instance, if the count is set at four (4) a user cannot use any of their previous four passwords. To edit the password archive count, follow these instructions:

1. Click on the System Admin tab at the right of the screen.
2. Click on the Application Settings link.
3. Click on the Edit Application Settings button.
4. Enter in the Password Archive Count number.
5. Click the Save button.

Expire Password After
Expire password after setting is how many days before the system requires a user to change their password.

1. Click on the System Admin tab at the right of the screen.
2. Click on the Application Settings link.
3. Click on the Edit Application Settings button.
4. Enter in the Expire Password After number (of days).
5. Click the Save button.

Providers
This section allows the System Administrator to edit and add providers. In this section you will see a list of providers within the RidePilot system.

Create a New Provider
To add a new provider into RidePilot follow these instructions:

1. Click on the System Admin tab at the right of the screen.
2. Click on the Providers link.
3. Click on the New Provider button.
4. In this section there are four (4) different sections.
   a. Details
   b. Primary Contact
   c. Business Address
   d. Mailing Address
5. Enter the information in the sections.
6. Click the Save button.

After clicking save the screen will refresh asking to create a new user. Follow these instructions to add a user.

**System-Wide Driver Requirements**
These are driver requirements that are global or available to all providers. To add a global a driver requirement, follow these instructions:

1. Click on the System Admin tab.
2. Click on the System-wide Driver Requirements link.
3. Click on the Create Driver Requirement button.
4. Screen will refresh and enter the following information:
   a. Name of requirement.
   b. Is the requirement legal?
   c. Is the requirement reoccurring?
5. Click the Submit button.
6. Screen will refresh showing the new requirement in view mode.

**System-Wide Vehicle Requirements**
These are vehicle requirements that are global or available to all providers. To add a global a vehicle requirement, follow these instructions:

1. Click on the System Admin tab.
2. Click on the System-wide Vehicle Requirements link.
3. Click on the Create Vehicle Requirement button.
4. Screen will refresh and enter the following information:
   a. Name of requirement.
   b. Is the requirement legal?
   c. Is the requirement reoccurring?
5. Click the Submit button.
6. Screen will refresh showing the new requirement in view mode.

**Mapping Mobility Types to Capacity Types**
In this section the System Admin has the ability to update mobility and capacity information.

**Configure Mobility Types**
To add an additional mobility type, follow these steps:

1. Click on the System Admin tab.
2. Click on the Mapping Mobility Types to Capacity Types link.
3. Click on the Mobility Type Lookup Table
4. Click on the Add button
5. A pop up will appear asking for the name of the new mobility type.
6. Click the Save button
To edit any existing mobility type, follow the above steps 1-4 then click on the name to edit, click on the edit button above the name and a pop up appear allowing the change of the name.

**Configure Capacity Types**
To add or edit a capacity type follow these steps:

1. Click on the System Admin tab.
2. Click on the Mapping Mobility Types to Capacity Types link.
3. Click on the Capacity Type Lookup Table
4. Click on the Add button
5. A pop up will appear asking for the name of the new capacity type.
6. Click the Save button

To edit any existing mobility type, follow the above steps 1-4 then click on the name to edit, click on the edit button above the name and a pop up appear allowing the change of the name.

**Mapping Mobility Types to Capacity Types**
This matrix is how the system knows how many seats or tie-downs a specific Mobility Type uses.

<table>
<thead>
<tr>
<th>MOBILITY</th>
<th>SEAT</th>
<th>TIE-DOWN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ambulatory</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Ambulatory - 2 seat</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Ambulatory-Ramp required</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Floor animal</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Powerchair</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Scooter</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Unknown</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Walker/Cane</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Wheelchair</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Wheelchair - 2 seat</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Wheelchair - Can Transfer</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Wheelchair - Oversized</td>
<td>0</td>
<td>2</td>
</tr>
</tbody>
</table>

To edit the information for seats and tie-downs, click the edit button on the top right of the matrix.
Lookup Tables

In this section a System Admin has the ability to add and edit information for multiple different tables within RidePilot. In this section there is a drop-down menu with the following options.

For each of these sections you can add additional and edit each entry.

1. Click on the System Admin tab.
2. Click on the Look Up table link
3. Choose from the drop-down menu the list you want to add to or edit.
4. Click the Add button to add an entry to the list

To edit any option, follow steps 1-3, click on the item to be edited, click on the Edit button, update any information needed, and finally click the save button.

Translations

RidePilot is designed to work in multiple languages and provide the flexibility to allow displayed text to be edited. This is accomplished through the use of translation keys that define the location of various words and phrases within the user interface, and then having localized versions of those keys for each language. For example, the following table shows a selection of translation keys with the English translations:

<table>
<thead>
<tr>
<th>Key</th>
<th>English (en)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodations</td>
<td>Accommodations</td>
</tr>
<tr>
<td>advance_notice_required</td>
<td>Advance Notice Required</td>
</tr>
<tr>
<td>age_note</td>
<td>What is your birth year?</td>
</tr>
<tr>
<td>all_services</td>
<td>All Services</td>
</tr>
</tbody>
</table>

Translation Key Locations

To display the location of the keys in the user interface:

1. Click the Tag link in the bottom-right corner of the page.
2. The [keys] are displayed instead of the words and phrases.
3. To revert back, click the hyperlink for the required translation language.

Edit Translations

To edit a translation:

1. Determine the translation key that you will need to access the translation. The translation keys can be displayed by clicking Tags in the bottom-right of the page. Once determined, revert to the appropriate language.
2. Display the Admin tab and click Translations to display the Translations page.
3. Use the Search box to find the appropriate translation key.
4. Click the hyperlink in the appropriate column.
5. A page is displayed allowing you to enter/edit the translation for the key.
6. Click Save to save the translation.

⚠️ The translations can contain HTML elements.

Processes

Creating a New Run

There are multiple ways to create a new run. This cheat sheet will describe all the different ways of creating a run.
Using the Dispatch Tab

14. Click on the Dispatch Tab

| Dispatch | Trips | Runs | Customers | Drivers | Vehicles | Reports | CAD/AVL |

15. Click on the + icon at the top of the Runs table

16. The screen will refresh and show the New Run ticket. The new run screen consists of four different sections.
   a. Name
   b. Date and Time
      i. Date
      ii. Scheduled Start Time
      iii. Scheduled End Time
      iv. Actual Start Time (Entered at the end of the day)
      v. Actual End Time (Entered at the end of the day)
   c. Vehicle
   d. Driver
      i. Driver
      ii. Unpaid Break Time
      iii. Paid (Yes/No)

17. Required for Completion (Entered at the end of the day)
   a. Start Odometer
   b. End Odometer

18. Click the Save button

Using the Runs Tab

1. Click on the Runs tab

2. Click on the New Run button

Follow steps 3-5 above to complete creating the run.

Creating a New Trip

There are multiple ways to create a new trip. This cheat sheet will describe all the different ways of creating a trip.
Using the Dispatch Tab – Assigning to a specific run

19. Click on the Dispatch Tab

<table>
<thead>
<tr>
<th>Dispatch</th>
<th>Trips</th>
<th>Runs</th>
<th>Customers</th>
<th>Drivers</th>
<th>Vehicles</th>
<th>Reports</th>
<th>CAD/AVL</th>
</tr>
</thead>
</table>

20. Click on the name of the run you want to assign the trip to

21. Once the run table is open click on the icon on the right of the screen

22. The screen will change and open up a new trip ticket. This screen is broken up into different sections. The main difference is at the top of the trip ticket it will show the Run information.

Assigned to **AM SLC Medical** **Vehicle:** Ford #6 **Driver:** Lloyd Statz, **Run Time:** 8:30am – 3:00pm, 3 trips

- **Trip Essentials**
  - Customer
  - Date
  - Pickup Time
  - Appointment Time (Optional)
  - Pickup Address
  - Drop off Address
  - Trip Purpose

- **Mobility Configuration** – There should be a 1 in the customer column

- **Number of Passengers Tracking**
  - Senior
  - Disabled
  - Low Income

- **ETA Calculation Related Settings**
  - Passenger Load
  - Passenger Unload
  - Allow Early Pickup

- **Eligibility**

- **Notes**
  - Other
j. Useful Info

   23. After entering all information click the Save button at the top right of the screen.
   24. A pop-up box should appear asking if you would like to create a return trip.
   k. If yes, enter in a new pick up time and appointment time (if applicable) and click the Yes button.
   i. A new trip ticket will appear with the pickup and drop off addresses reversed from the original trip and the new pick up and appointment times entered.
   ii. Review the screen to ensure all information is correct and click the Save button.
   l. If no, click the No button

Using the Dispatch Tab – Assigning to the Unscheduled Que

This is very similar to the above instructions; the main difference is instead of clicking on the name of a run you need to click on the + icon at the trips table at the bottom of the screen.

Following this step will create a trip in the unscheduled queue. Once this icon is clicked follow steps 4-6 above.

Using the Trips Tab

1. Click on the Trips tab

   ![Trips Tab](image)

2. Click on the button

Once the button is clicked follow steps 4-6 above.

Using the Customers Tab

1. Click on the Customers tab

   ![Customers Tab](image)

2. Click on the name of the customer you want to create the trip for

3. Click on the button

Once the button is clicked follow steps 4-6 above.

When using either the Trips or Customers Tab to create a new trip, the new trip will be put into the Unscheduled queue.

Creating a New Customer

A step by step instruction on how to create a New Customer in RidePilot.
25. Click on the Customers Tab

26. Click on the New Customer button.

27. The screen will refresh showing the new customer screen. The screen is made up into nine sections.
   a. Details
      i. Photo (Optional)
      ii. First, Middle, Last Names
      iii. Gender (Optional)
      iv. Phone Number
      v. Alternative Phone (Optional)
      vi. Email (Optional)
      vii. Date of Birth
      viii. Ethnicity (Optional)
      ix. Default Service Level (Optional)
      x. Default Funding Source (Optional)
      xi. Emergency, Private, Public Notes (Optional)
   b. Mobility Configuration – Ensure to choose the default mobility for the customer, by entering the number 1 in the Customer column and row that fits best.
   c. ETA Calculation Related Settings
      i. Passenger Load Time
      ii. Passenger Unload Time
   d. Addresses – Customer must have at least one address saved. See below on how to add an address to the customer
   e. Eligibility - (Optional)
   f. Authorized Providers – Mostly greyed out for anyone not a System Administrator.
   g. Travel Trainings - (Optional)
   h. Funding Authorization Numbers (Optional)
   i. Donations (Optional)
   j. Customer Comments (Optional)
   k. Customer Pop Up Message (Optional)

28. After entering all information needed click the Save button.

**Adding an Address for a Customer**

1. Click the Add button in the address section. If you do not see this button, click the Edit button at the top of the screen.
2. A pop up will appear asking for the following information:
   a. Code – This is set by provider and can be anything.
b. Non-street mailing address (P.O. Box) Check box

c. Address – If needed there is an option to add the Latitude and Longitude for the address. If the latitude and longitude are used ensure that the street address is entered into the Notes field

d. Phone Number

e. Default Trip Purpose

f. In District – This is not used.

g. Notes – These are notes for this specific address

Creating a New Vehicle

A step by step instruction on how to create a New Vehicle in RidePilot.

1. Click on the Vehicles Tab

2. Click on the Create Vehicle button.

3. The screen will refresh showing three sections.

   a. Details
      i. Name
      ii. Year
      iii. Make
      iv. Model
      v. License Plate
      vi. VIN
      vii. Vehicle Type
      viii. Vehicle Should Appear on Vehicle Report
      ix. Initial Mileage

   b. Garage
      i. Address – Location vehicle is parked at night
      ii. Phone number

   c. Additional Information (Optional)
      i. Ownership
      ii. Fuel Card #
      iii. Registration Expiration Date
      iv. Insurance Coverage
      v. Accessibility Equipment

4. Click the Save button.
Creating Vehicle Compliances
A step by step instruction on how to create a vehicle compliance in RidePilot.

There are two different types of compliances Legal and Non-Legal. These instructions are for Provider Admins only.

Legal Compliance

1. Click on the Provider Settings Icon
2. Click on the Vehicles link on the left of the screen
3. Click on the Provider-Specific Vehicle Requirements
4. Click on the Create Vehicle Requirement button
5. A screen will refresh

   **New Vehicle Requirement**

   a. Name
   b. Is the new requirement legal?
   c. Is the new requirement reoccurring?

6. Click the Submit button to save the new compliance
7. Click on the Vehicles Tab

8. Click on the Edit Vehicle button.
9. The screen will refresh allowing the addition of compliances.
10. Click on the Add legal requirement button
11. A pop up will appear asking for information
   a. Type – Chosen from dropdown menu.
   b. Name – Auto populate from the Type
   c. Notes
   d. Due Date
   e. Compliance Date – Date completed
   f. Associated Documents – Ability to upload any documents associated with the event
12. Click the Save button

Regular Compliance Event

The only difference in steps from adding a Legal Compliance is step 10. Instead of clicking on the Add Legal Requirement button a user will click on the button.

Complete Event
To complete an event, follow these instructions

1. Click on the Vehicles tab

2. Click on the name of the vehicle
3. Click on the Edit button
4. Click on the name of the event you want to complete
5. Enter the following
   a. Compliance Date
   b. Compliance Mileage
   c. Associated Documents – Upload any checklists or invoices
6. Click the save button
Creating Vehicle Preventative Maintenance Events

A step by step instruction on how to create a vehicle preventative maintenance event in RidePilot.

Creating Preventative Maintenance Events

1. Click on the Provider Settings icon
2. Click on the Vehicles link on the left of the screen
3. Click on the Provider-Specific Vehicle Maintenance Schedule Types
4. Click on the button
5. A pop up will appear asking for a name
6. Click the Save button to save the new name
7. Click the name you just created
8. Click on the button to create a new event
9. A pop up will appear asking for more information
   a. Name of event
   b. Mileage – How often is the event due (i.e. every 3000 for Oil Change)
   c. Upload Inspection Requirement Sheet (Optional)

As a provider you will want to create an event for all the different events for the vehicle (i.e. Oil Change, Belt Changes, Tires, etc.)

Assigning Preventative Maintenance Schedules

Follow these instructions on assigning a preventative maintenance to a vehicle.

1. Click on the Vehicles tab
2. Click on the name of the vehicle
3. Click on the Edit button
4. In the Preventative Maintenance Logs area
   a. Click on the drop-down menu for Maintenance Schedule Type
   b. Choose the vehicle type for this vehicle
   c. Click on the button after choosing the type
5. A pop up will appear asking for
   a. Schedule
   b. Name – Auto populate
   c. Notes
   d. Due Mileage
   e. Compliance Date – Date completed
   f. Compliance Mileage – Mileage when completed
   g. Associated Documents upload
6. Click the save button
Complete Event
To complete an event, follow these instructions

1. Click on the Vehicles tab
2. Click on the name of the vehicle
3. Click on the Edit button
4. Click on the name of the event you want to complete
5. Enter the following
   a. Compliance Date
   b. Compliance Mileage
   c. Associated Documents – Upload any checklists or invoices
6. Click the save button

Creating a New User
A step by step instruction on how to create a New User in RidePilot.

1. Click on the Provider Settings Tab.
2. Click on the Users link on the left of the screen.
3. Click on the button on the right of the screen.
4. Enter the following information into the Details Section
a. Enter First and Last Name.
b. Enter a Username (This will be used by the user to log into RidePilot)
c. Set the user’s permission (role) level. The options are:
   i. System Administrator (Can only be assigned by another System Administrator)
   ii. Provider Administrator – Able to make updates to provider settings.
   iii. Editor – Able to make updates to all customer, driver, and vehicles. Used primarily for Dispatchers.
   iv. User – Able to create trips and update manifest information. Used primarily for Drivers.
5. Enter the user’s address. This is an optional section.
6. Enter security questions, if the user wants to use them. These are not required.
   a. Click on the button
   b. Enter in a Question and an Answer
   c. Click the Ok button to save the question.
   d. To create more questions simply follow steps A-C again.
7. Click the Save button to save all changes.

Creating a New Driver

Before creating a new driver in RidePilot you must create a new user. Please see either the New User section of the User’s Guide or the Creating a New User cheat sheet.

This cheat sheet is a step by step instruction on how to create a New Driver in RidePilot.

1. Click on the Drivers Tab
2. Click on the button
3. The screen will refresh into 4 different sections
   a. Details
      i. Photo (Optional)
      ii. Phone Number
      iii. Alternative Phone Number
      iv. Paid vs Volunteer
      v. Associated User – This is the user that was created specifically for this driver
Creating Driver Availability

Instructions on using the new Driver Availability screens. One screen is for the driver, the other is for the dispatcher.

Driver Screen

This screen can be viewed by:

- Clicking on the Drivers Tab
- Click on the Show Availability link in the Available column in the row of the driver

Another option to access the screen is:

- Click on the Drivers Tab
- Click on the name of the driver you want to view
- Click on the Show Availability button

In this screen, a driver can create their recurring availability, update their availability on a day by day basis, and schedule future planned time off/leave.

Recurring Schedule

In this section, the driver sets their weekly recurring availability.

Using this image as an example, here is a key to the color scheme.

- Green = Time driver is available
- White/Clear = Time driver is unavailable
- Gray = Times when provider is not operating

In this section, each row is a different day of the week. A driver can set their recurring availability for each day as needed. If the driver is available for the full operating hours of the provider, the driver can click the check box under the All Day column.

If the driver is not available all day, but only for a specific length of time, the driver can:

- Click the button
• A pop up will appear
  o Enter in the time frame the driver is available
  o Click the Save button

The driver can follow the above steps if they have multiple time frames on any given day.

If the driver is not available on a given day, they simply have to ensure that the All-Day checkbox is not clicked and click the ✗ button for that day to clear out any other schedule. Once this is done the driver should only see the gray bars for the times when the provider does not operate. Please see Saturday or Sunday in the above image.

**Daily Availability**

In this section the driver can update their recurring availability on a day by day basis without effecting the original recurring schedule.

This section functions much like the above when a driver needs to set their schedule. There are only two main differences. This section is for specific days, up to one month in advance, the other is that a driver can reset any given day back to their recurring schedule. The driver can do this by clicking on the button.

**Planned Leave**

This section is where an Editor or above can schedule time off for a driver.

They can do this by:

1. Clicking on the New button
2. Enter in a Start Date
3. Enter in an End Date
4. Enter in a reason for the time off
5. Click the Save button

When a driver puts in a vacation the driver will be removed from any runs, they were previously scheduled.

Once a leave has been planned it will show as below:
To edit a planned leave, click on the edit 📝 icon. This will show the same pop up as above.

To delete a planned leave, click on the delete ✗ icon.

**Creating Driver Compliances**

A step by step instruction on how to create a Driver compliance in RidePilot.

There are two different types of compliances Legal and Non-Legal. These instructions are for Provider Admins only.

**Legal Compliance**

1. Click on the Provider Settings tab
2. Click on the Drivers link on the left of the screen
3. Click on the Provider-Specific Driver Requirements
4. Click on the **Create Driver Requirement** button
5. A screen will refresh

**New Driver Requirement**

- a. Name
- b. Is the new requirement legal?
- c. Is the new requirement reoccurring?

6. Click the Submit button to save the new compliance
7. Click on the Drivers Tab

8. Click on the **Edit** button.
9. The screen will refresh allowing the addition of compliances.

10. Click on the **Add legal requirement** button
11. A pop up will appear asking for information
   a. Type – Chosen from dropdown menu.
   b. Name – Auto populate from the Type
   c. Notes
   d. Due Date
   e. Compliance Date – Date completed
   f. Associated Documents – Ability to upload any documents associated with the event

12. Click the Save button

**Regular Compliance Event**

The only difference in steps from adding a Legal Compliance is step 10. Instead of clicking on the Add Legal Requirement button a user will click on the **Add compliance event** button.

**Complete Event**

To complete an event, follow these instructions

1. Click on the Drivers tab
2. Click on the name of the driver
3. Click on the Edit button
4. Click on the name of the event you want to complete
5. Enter the following
   a. Compliance Date
   b. Associated Documents – Upload any checklists or invoices
6. Click the save button
Creating a Subscription Run
Use this to create a subscription run in RidePilot.

1. Click on the Runs Tab

2. Click on the Create New Subscription Run button

3. The screen will refresh and the Subscription Run ticket will appear. The new screen will be broken up into five different sections.
   a. Name
   b. Date and Time
      i. Scheduled Start Time
      ii. Scheduled End Time
   c. Repetitions
      i. Start Date
      ii. Stop Date (Optional)
      iii. Days of Week – Day(s) of the week the runs repeat
      iv. Repeat Every - This is how many weeks between creation of the runs. If you enter 1 it means it will repeat every week. Enter a 2 it means it will repeat every other week.
   d. Vehicle
   e. Driver
      i. Driver Name
      ii. Unpaid Break Time
      iii. Paid – Yes/No

4. Click the Save button

Creating a Subscription Trip
Use this to create a subscription trip in RidePilot.

1. Click on the Trips tab

2. Click on the Create New Subscription Trip button

3. The screen will change and open a new trip ticket. This screen is broken up into different sections.
   a. Trip Essentials
      i. Customer
      ii. Date
      iii. Pickup Time
      iv. Appointment Time (Optional)
      v. Pickup Address
vi. Drop off Address
vii. Trip Purpose
b. Mobility Configuration – There should be a 1 in the customer column
c. Repetitions
   i. Start Date
   ii. Stop Date (Optional)
   iii. Days of Week – Day(s) of the week the runs repeat
   iv. Repeat Every - This is how many weeks between creation of the runs. If you enter 1 it means it will repeat every week. Enter a 2 it means it will repeat every other week.
d. Number of Passengers Tracking
   i. Senior
   ii. Disabled
   iii. Low Income
e. ETA Calculation Related Settings
f. Eligibility
g. Notes
h. Other
   i. Useful Info
4. Click the Save button