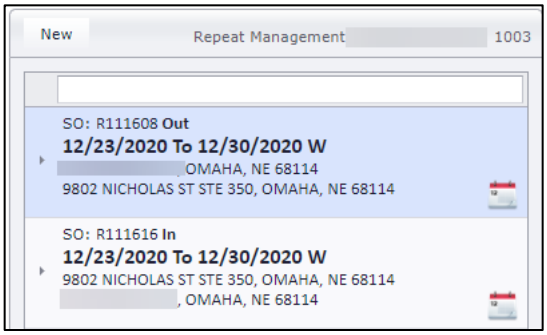
Repeat Management Vertical Pad

Introduction

The Repeat Management vertical pad will display all future upcoming repeat appointments for the member.



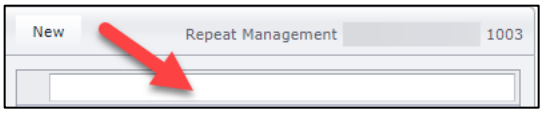
The Repeat Management vertical pad contains the repeat appointments as a whole. The Trip Management vertical pad has each separate appointment.

To view future repeat appointments, click on the member's name in the Client Management vertical pad and all other vertical pads will populate with the member's information.

Searching for Rides

You can search for future appointments using the search feature. You can search by:

- Trip Date (Month and Date Only)
- Trip Number



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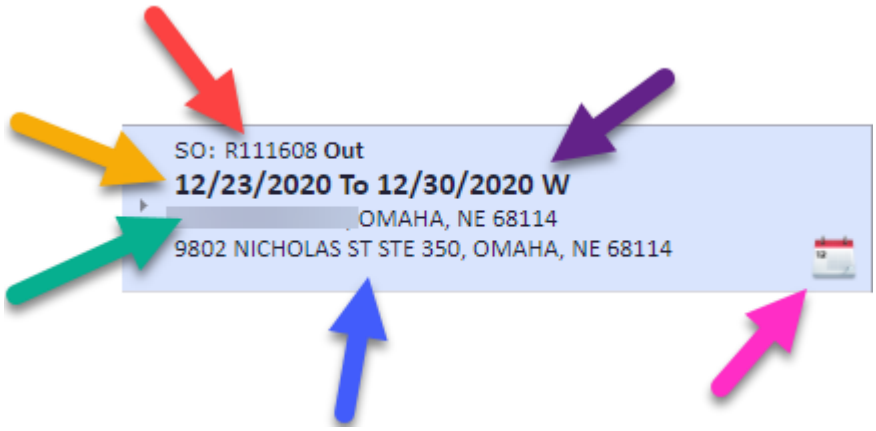
Viewing Future Rides

You can view pertinent information about the upcoming rides from the vertical pad.



Ride Detail	Definition
Red Arrow	Trip Number
Orange Arrow	Repeat Appointments Start and End Date
Purple Arrow	Days of the Week of Repeat Appointments • M – Monday • T – Tuesday • W – Wednesday • R – Thursday • F – Friday • S – Saturday • N – Sunday
Dark Green Arrow	Pick Up Location
Blue Arrow	Drop Off Location
Fuchsia Arrow	Calendar View of Repeat Appointments

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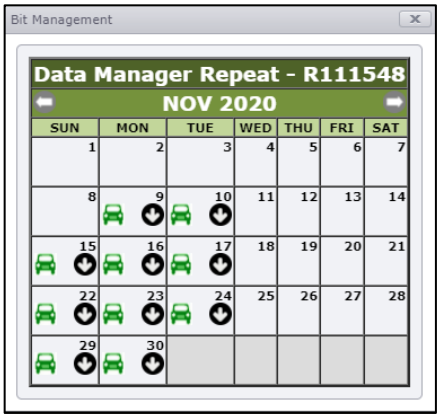
Viewing Future Rides, continued

To view a calendar view of repeat appointments, you can click on the Calendar icon.



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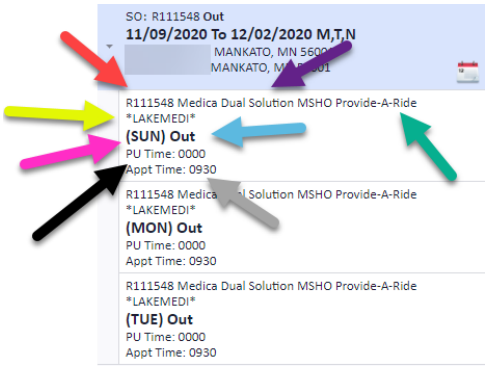
Viewing Future Rides, continued

You can also click on the black triangle to view the repeat trip details by days of the week.



Ride Detail	Definition
Red Arrow	Trip Number
Purple Arrow	Member's Plan
Dark Green Arrow	Type of Transportation
Yellow Arrow	Transportation provider
Fuchsia Arrow	Date and day of the week of transportation
Light Blue Arrow	Out – Outbound ride from member's home to clinic In – Inbound ride from clinic to member's home
Black Arrow	Pick up time
Grey Arrow	Appointment time

Scheduling a Repeat Appointment

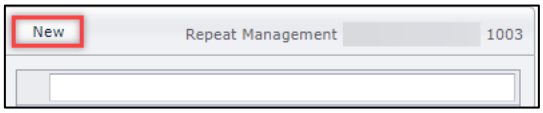
Introduction

From the Repeat Management vertical pad, you will schedule the following types of repeat transportation appointments:

- One-way rides
- Round trip rides
- For Numerous Days of the Weeks
- For Numerous Weeks

Process

Please follow the steps below for scheduling transportation in the Repeat Management vertical pad.

Step	Action
1	Click **New** in the upper left hand corner. 
2	A new screen will pop where the ride request can be entered. If the member has any alerts on their account, it will display at the top of the screen. Click **OK** to remove the alert.
3	Under the **Agency (Plan and Benefit)** drop down, select the type of transportation that you are scheduling.
4	Under **Client Name and Address, Client Phone, and Client Alternate Phone**, the member's information will be displayed. This information cannot be changed.

Continued on next page

Process, continued

Step	Action
5	Under **Service Authorization Number (for Plan),** this is where the member's current authorizations can be pulled into the ride. **Note**: If there is no authorization required for the member's ride, select **Authorization Not Required.** Trip Type: ANR Address: AUTHORIZATION NOT REQUIRED
6	Enter the **Start Date** and **End Date** of the repeat appointments. You can either select the drop down to view the calendar or type in the start or end date of the appointments. Start Date November 2020 Sun Mon Tue Wed Thu Fri Sat Today Clear **Note**: If you select a date where the member already has an appointment scheduled, a pop up will display with the same date trip information. Existing/Conflict Trips List DATE: 10/27/2020 DAY: TUE TRIPID: T1947274 SOURCE: 101 MONET PL , MANKATO, MN 56001 DESTINATION: 560 S MAPLE ST STE 200, WACONIA, MN 55387 QRyde will not stop you from scheduling more than one ride on the same day, but it will provide you with the ride details.

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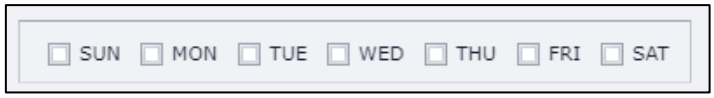
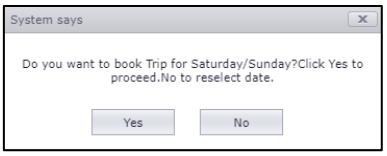
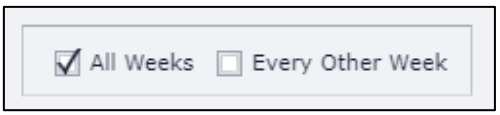
Process, continued

Step	Action
7a	Click the days of the week that is the member is requesting transportation.  **Note**: If the member is requesting transportation different days of the weeks for several weeks, you will need to set up different repeat appointments. • For example: One week is M, W, and F appointments and the next week is Tu and Sat appointments. Different repeat appointments will need to be scheduled in this case
7b	If you select a date that is on the weekend, a pop up will display asking if you want to continue to schedule transportation.  **Note**: QRyde will not stop you from scheduling rides on the weekend, but it will ask for confirmation before proceeding. This will serve as a reminder that some transportation providers are limited on the weekend.
8	Click if those days of the week apply to all weeks in the repeat appointment or every other week. 

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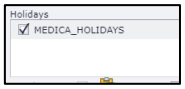
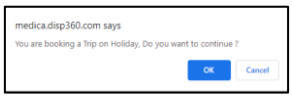
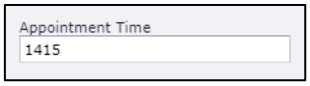
Process, continued

Step	Action
9a	In the **Holidays** box, this signifies that the rides in the repeat series will exclude any holidays. 
9b	If you select a date that is on a holiday, a pop up will display asking if you want to continue to schedule transportation.  All Medica and federal holidays have been loaded into QRyde. **Note**: QRyde will not stop you from scheduling rides on a holiday, but it will ask for confirmation before proceeding. This will serve as a reminder that some transportation providers are limited on holidays.
10	Next to Travel Date, there are two check boxes: • One Way • Inbound Leg **Note**: If it is a one way ride, you must select the *One* Way box. We will use the *Inbound Leg* box when adding legs to an already scheduled ride.
11	Enter in the Appointment Time in the **Appointment Time** field.  You will use military time for all time slots.

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Process, continued

Step	Action
12	For the member's Pick Up Time, the system will automatically generate a pick up time based on the member's travel time to their location with an additional 30 minutes. For example: • The member's appointment time is at 10:30 am • The travel time from the member's home to the location is 25 minutes • The system will add an additional 30 minutes to the pick time • The member's pick up time is 9:35 am 10:30 appointment – 25 minutes travel time – 30 minutes = 9:35 am. **Note**: The system will automatically generate the pick up time once the ride is saved. If the member wants to change the pick time, that can be done by editing the ride.
13	In the **Who Called** drop down, select the individual who called to schedule transportation. WhoCalled MEMBER You may only select one individual: • AUTH REP • CARE COORDINATOR • CASE MANAGER/SOCIAL WORKER • FACILITY • FOSTER CARE • HEALTH ADVOCATE • INTERPRETER • MEMBER (Default) • MEMBER REP

Continued on next page

Process, continued

Step	Action
14	The **Pick Up Address** and **PU Phone** field will automatically be populated from the address and phone number on the Member Profile page. We will discuss changing the member's address and phone number later on in training.
15	In the **Pick Up Entrance** field, you can type in the location of where the member would like to be picked up. PickUp Entrance Back of building
16a	In the **Drop Off Address** field, you can type in the drop off location. You can search for locations by: • Name of Clinic/Facility/Silver Sneakers Address • Provider Name • City Name DropOff Address HomeAddress AltAddress Frequently Used mankato 0 0 MANKATO CLINIC DERMATOLOGY - 1400 MADISON AVE STE 400 A, MANKATO, MN, 56001,009,538,701,744,749,750~44.169051~-93.949906~ PAIN CENTERS OF MINNESOTA MANKATO - 1400 E MADISON AVE STE 402, MANKATO, MN, 56001,009,538,701,744,749,750~44.16695~-93.972201~ ANDREWS FAMILY CHIROPRACTIC - 285 SAINT ANDREWS DR STE 300, MANKATO, MN, 56001,009,538,701,744,749,750~44.18099~-93.957653~ PEARLE VISION - 111 STAR ST , MANKATO, MN, 56001,009,538,701,744,749,750~44.166804~-93.960495~ MINNESOTA AUTISM CENTER - 2101 ROLLING GREEN LN , NORTH MANKATO, MN, 56003,009,538,701,744,749,750~44.192036~-94.051729~ MANKATO CLINIC AT MADELIA - 121 DREW AVE SE , MADELIA, MN, 56062,009,538,701,744,749,750~44.049502~-94.409306~ OPEN DOOR HEALTH CENTER - 309 HOLLY LN , MANKATO, MN, 56001,009,538,701,744,749,750~44.162815~-93.969162~ Click on the facility name to add it into the ride. **Note**: If you have selected a location, then need to select a different location, click on the black arrow drop down to reset your search. Then you are able to type in a new search. DropOff Address HomeAddress AltAddress Frequently Used

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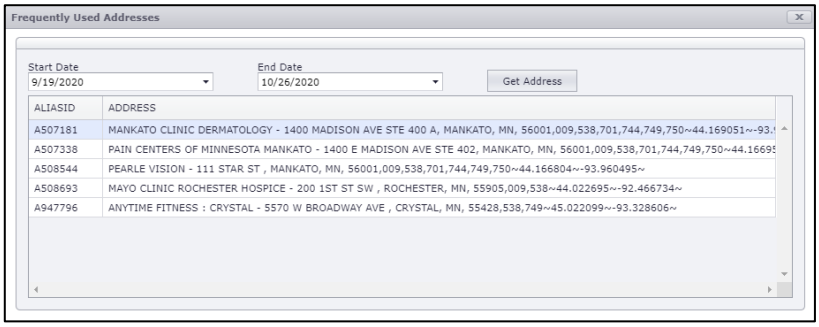
Process, continued

Step	Action
16b	You can also click on **Frequently Used** to view previous drop off locations for the member. You can also search by ride date to narrow down your results.  To pull one of these addresses into the ride, you can double click on the address.
17	In the **DO (Drop Off) Phone** and **Drop Off Entrance**, you can type in a drop off phone number and specific entrance to drop the member off. These fields are optional.
18	When you select a drop off location, the system will automatically generate a **Distance** and **Travel Time.** This is where the pick up time is calculated from.

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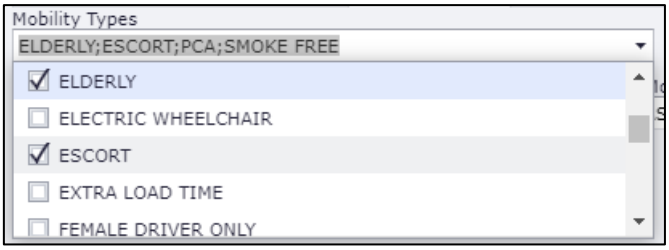
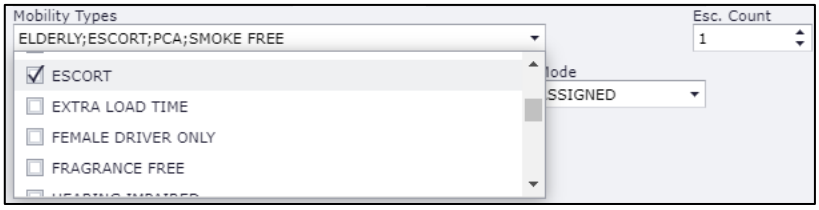
Process, continued

Step	Action
19	Under the **Mobility Types** drop down, you can select multiple drop downs to meet the member's need for that specific ride.  **Note**: If any Mobility Type is selected on the Member Profile page, it will automatically be checked on all future rides.
20	To add additional passengers to the ride, the *Escort* mobility type must be checked.  Once *Escort* is selected, the **Esc. Count** drop down will become active. You can use the drop down to add any additional passengers.

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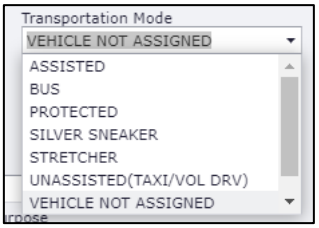
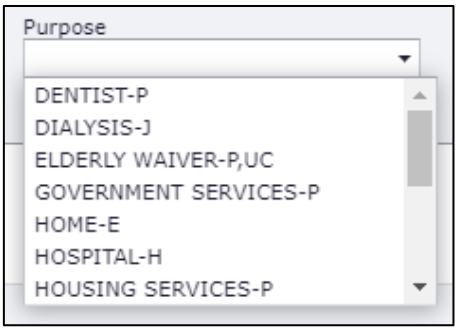
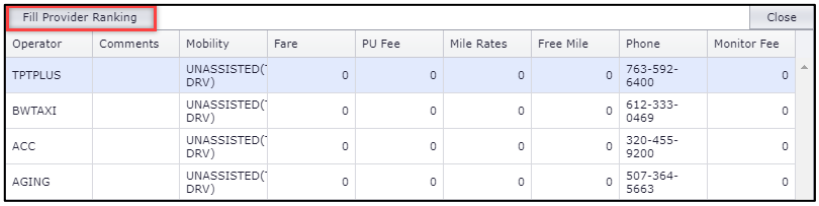
Process, continued

Step	Action
21	In the **Transportation Mode** drop down, you will select the appropriate type of vehicle for the transportation.  • *Assisted* – Member Requires Driver Assistance (STS) • *Bus* – Public Transit • *Protected* – Protected Vehicle (STS) • *Silver Sneaker* – Rides to SilverSneakers • *Stretcher* – Stretcher Vehicle (STS) • *Unassisted (Taxi/Vol Drv)* – Non-Emergency Medical Transportation (NEMT) • *Vehicle Not Assigned* – Default • *Wheelchair Lift/Ramp* – Wheelchair Vehicle (STS)
22	In the **Ride Purpose** drop down, you will select the reason for the ride. You are only able to select one drop down.  **Note**: You will want to select the ride purpose that matches the drop off location of the ride.

Continued on next page

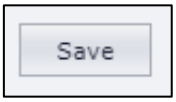
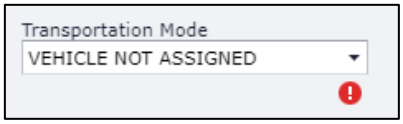
Process, continued

Step	Action
23	In the **Provider Ranking** drop down, this is where the system helps you determine the appropriate provider for the ride. Click on the black arrow to open up the Provider Ranking field.
24	Click on *Fill Provider Ranking* to provide a list of providers that have availability to accommodate the transportation.  Operator | Comments | Mobility | Fare | PU Fee | Mile Rates | Free Mile | Phone | Monitor Fee TPTPLUS | | UNASSISTED(DRV) | 0 | 0 | 0 | 0 | 763-592-6400 | 0 BWTAXI | | UNASSISTED(DRV) | 0 | 0 | 0 | 0 | 612-333-0469 | 0 ACC | | UNASSISTED(DRV) | 0 | 0 | 0 | 0 | 320-455-9200 | 0 AGING | | UNASSISTED(DRV) | 0 | 0 | 0 | 0 | 507-364-5663 | 0 Double click on a provider to add them into the ride.
25	In the **Client Notes** section, this is where any member alerts will be displayed.

Note: If a provider accepts the repeat appointments, they must accept all appointments in the repeat request

Continued on next page

Process, continued

Step	Action
26	In the **Driver Notes** section, this is where you will type out any requests to the transportation provider. You will only type in requests that have not been requested in other sections of the ride request. These notes will be given to the transportation provider and not the individual driver. **Note**: Like all member requests, we can enter in the request, but we cannot guarantee that the transportation provider is able to accommodate.
27	Once all fields have been entered in the ride request, click **Save,** to save the ride and submit to the transportation provider.  Once you click **Save**, the ride is immediately sent to the transportation provider. **Note**: If there are any required fields that are missing, the system will generate a red exclamation point letting you know that there is missing information. 

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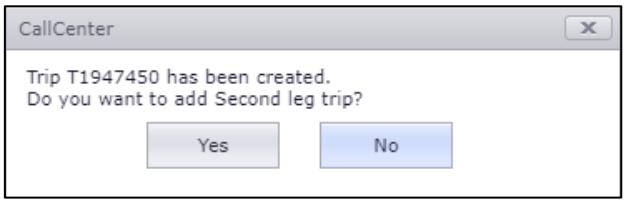
Process, continued

Step	Action
28	Once the ride has been saved, the system will generate a confirmation message as well as the trip number. The message will also ask you if you would like to schedule a second leg of the ride.  • For a one-way ride, you will select *No* • For a round trip or multi-leg ride, you will select *Yes*
29	If you select *No* to schedule a second leg, at the top of the screen, the system will give you a confirmation that the ride has been saved. Click **Close** in the Trips Management screen to go back to the main page.

Continued on next page

Process, continued

Step	Action
30	If you select *Yes* to schedule a second leg, all the ride details that you have entered for the first leg will remain for the second leg. **Appointment Time, Pick Up Time,** and **Return Time** has been zeroed out. Members will have the ability to request a return ride pick up time, if they would like. This is optional. **Note**: We will discuss the process of what happens when a member misses their scheduled return ride pick up time later on in training.
31	You will also notice that the **Pick Up Address** and **Drop Off Address** locations have been flipped for the return ride.
32	You will quality check the remaining fields to make sure they match the member's transportation request. **Note**: You do not need to change the **Ride Purpose**.

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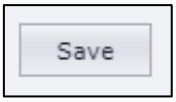
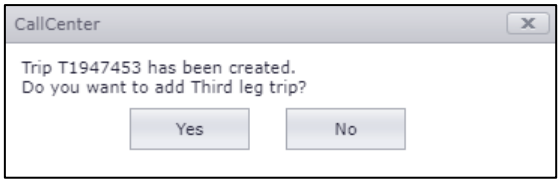
Process, continued

Step	Action
33	Once you have quality checked all required fields, click **Save,** to save the ride and submit to the transportation provider.  Once you click **Save**, the ride is immediately sent to the transportation provider.
34	Once the ride has been saved, the system will generate a confirmation message as well as the trip number. The message will also ask you if you would like to schedule a third leg of the ride.  • For a round trip ride, you will select *No* • For a multi-leg ride, you will select *Yes*
35	Once the ride has been saved, click **Close** in the Trips Management screen to go back to the main page.

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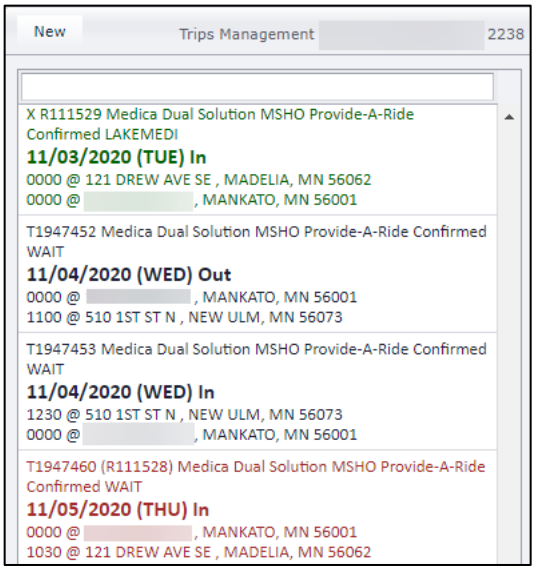
Viewing Repeat Appointments

The Repeat Management vertical pad contains the repeat appointments as a whole. The Trip Management vertical pad has each separate appointment.

You will notice once your save your rides, the individual rides will display in the Trip Management vertical pad. The rides are displayed in different colors.



Once the ride is saved, it is sent to the Vendor Portal. Each transportation provider is responsible for maintaining their own vendor portal and downloading, accepting, and rejecting rides. Rides are downloaded at the one week out mark.

The color that the ride is displayed as in the Trips Management vertical pad provides details on that ride.

- **Red** trips are repeat trips that have been downloaded in the vendor portal
- **Green** trips are repeat trips have not been downloaded in the vendor portal
- **Black** trips are not connected with the repeating rides

Editing Repeat Appointments

Introduction

Since repeat appointments are stored in two different vertical pads: Trips Management and Repeat Management, you can also edit the repeat appointments in two different places.

There are different types of edits that you can do, but there are specific rules that must be followed if the big changes are made to the repeat appointments.

Note: We will need to quality check that all future appointments have been updated in Trip Management. Trips that have already been downloaded (red ink) may need edits to the individual rides

Type of Edit	Trip Management	Repeat Management
Change Pick Up Time	For individual ride changes and changes that do not impact every ride in the repeat series, you can edit the individual leg/ride in the Trip Management vertical pad	To change the ride details of every single ride in the repeat series, you can edit the entire series in the Repeat Management vertical pad
Change Appointment Time		
Change Pick Up Location		
Change Drop Off Location		
Change Ride Details such as passengers, pick up/drop off door, mobility types, phone number		
Add a Leg		
Cancel a Leg		
Cancel Entire Ride		
Change Date of Ride	For individual date changes and provider changes, the individual trip must be cancelled and a new trip scheduled	For individual date changes and provider changes, the entire repeat series must be cancelled and a new series scheduled
Change Transportation Provider		

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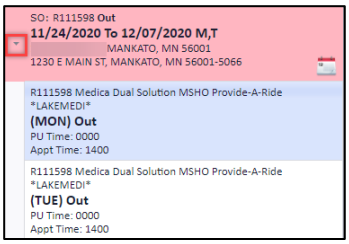
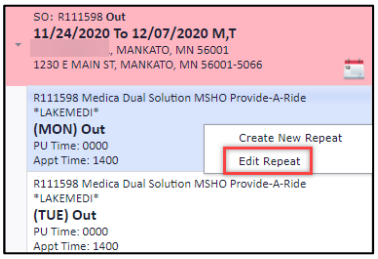
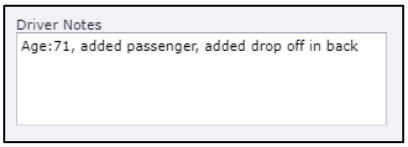
Editing Repeat Appointments in Repeat Management

Follow the steps below for editing the repeat series in Repeat Management.

Step	Action
1	Locate the repeat series you want to edit. Click the arrow to expand the individual rides. 
2	Right click on an individual ride and select *Edit Repeat.* 
3	Change the information in the appropriate field or drop down.
4	Document in the Driver Notes, the changes you made. 
5	Click **Save** to save your changes. Then click **Close** to go back to the main page to view future rides. **Note**: Due to the information displayed in the Repeat Management vertical pad, not all changes will be visible.