

Overview

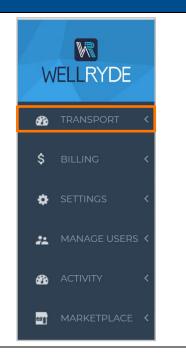
This job aid explains how to assign trips to drivers in the WellRyde Dispatch portal. You can complete the following tasks using this job aid:

- Navigate To Trips
- Create Custom Filters
- View Custom Filters
- Edit Custom Filters
- Color Code
- Assign an Individual One Trip or Multiple Trips
- Unassign and Reassign Trips
- Re-route and Cancel Trips
- Export a Trip List

Navigate to Trips

In the WellRyde Dispatch Portal, trips are managed and assigned through Transport on the homepage.

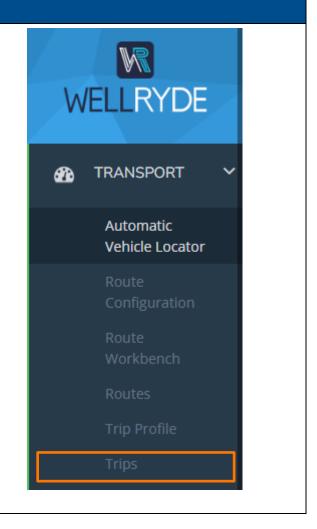
1. After logging into the WellRyde Dispatch Portal, navigate to the left side toolbar and click the **Transport** drop-down menu.





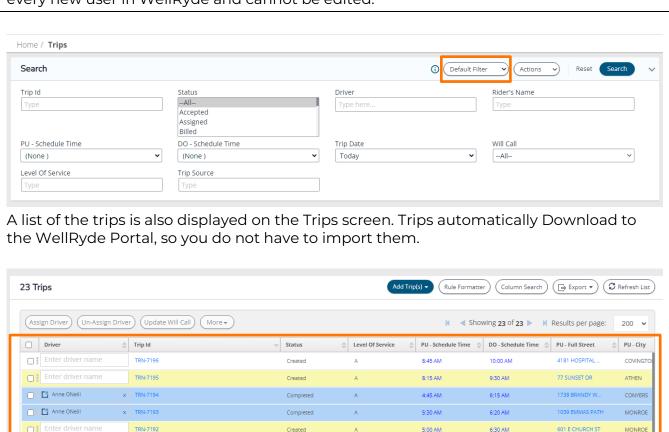
Navigate to Trips

2. From the Transport drop-down menu, select **Trips** to view the trips.





The Trips screen displays. There are numerous tasks you can do from this page, such as search, create custom filters, and view trips. The page will automatically default to the Default Filter view. This view can be found at the top of the Trips page and is the same for every new user in WellRyde and cannot be edited.





Create Custom Filters 1. To create custom filters from the Trips page, click the Actions dropdown menu +Add Home / Trips Import Search (i) (Default Filter Make Default Status Trip Id Ride Driver Edit View --All--Delete View Accepted Assigned Add View Billed PU - Schedule Time DO - Schedule Time Trip Date (None) (None) Today --All--Level Of Service Trip Source 2. The New View window displays. For example, to create a custom filter for dispatching today's trips, you would complete the following fields: Add View \times a. View Name: Enter i View Level User Level View Name Tvr **Dispatching** in the View SEARCH FILTERS Name field. Filter Type Values b. View Level: Select the Trip Date **▼** Today appropriate view level **(** which designates who is allowed to see the view. User-level only allows you to see the view. II. Group Level is currently **NOT** being used in the WellRyde portal.

III.

Company Level allows everyone in your company to see

the view.



Create Custom Filters

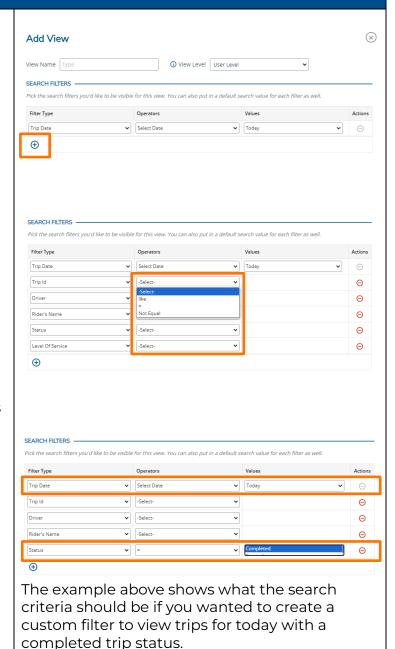
In the Search Filters section, pick the search filters or fields you would like to be visible on the Trip page in the Search section when you view the custom filter. These fields are used to further define your search criteria.

The system has already added the field Trip date.

- 3. Click Add Search Filter to add additional fields. For the Dispatching custom filter, you may want to add the following fields:
 - Trip ID
 - Driver
 - Rider's Name
 - Status
 - Level of Service

For each field that you add, you will specific a default search value such as "like", "equal" or "not equal" to further define your search.

- "Like" prevents you from having to type out an entire word while still generating search results.
- "Equal to" provides an exact data match, where
- "Not equal to" excludes the value entered or specified.





Create Custom Filters

- **4.** In the Table Columns section, this is where you would choose the fields you would like to include in your results table.
 - a. Available Columns list includes the available fields that can be included in the results table.
 - Included in Table includes the list of fields that will be included in the results table.

For the Dispatching custom filter, it might be helpful to note the following fields:

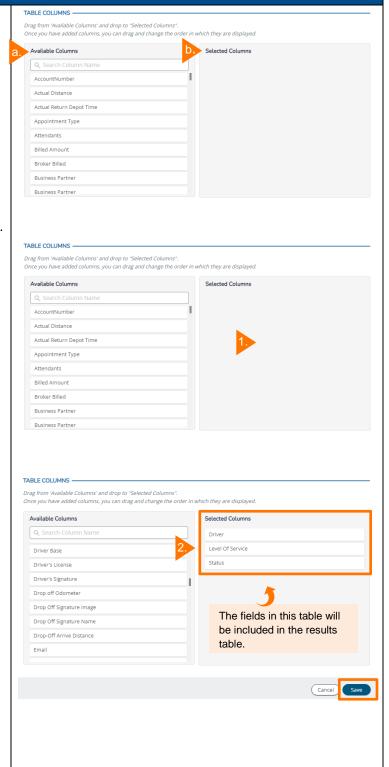
- Trip Date
- Trip ID
- Driver
- Rider's Name
- Rider's Phone
- Level of Service
- Status

To include these columns in the table:

- Click and drag one of the available column categories/fields to the "Selected Columns".
- 2. To reorder the columns, click and drag the categories to the desired location. It is recommended to place the most important columns at the top of the list for easier viewing access on the vehicle table.

Repeat this process for each field/category you'd like to add to the results table.

5. To save the new filter view, click **Save Changes**.

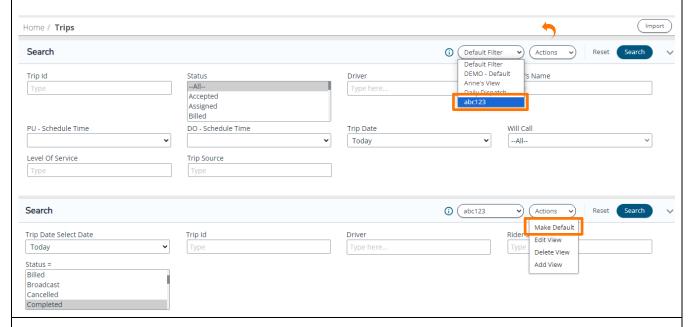




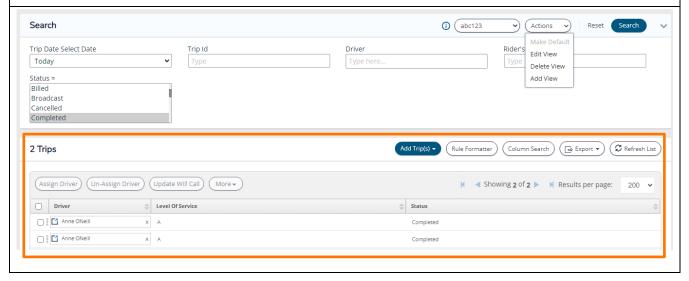
Viewing Custom Filters

1. After saving the custom filter, to view it, click the current view drop-down menu and select the new custom filter name – **abc123**.

To set the Dispatching custom filter as your default filter, click Make Default.



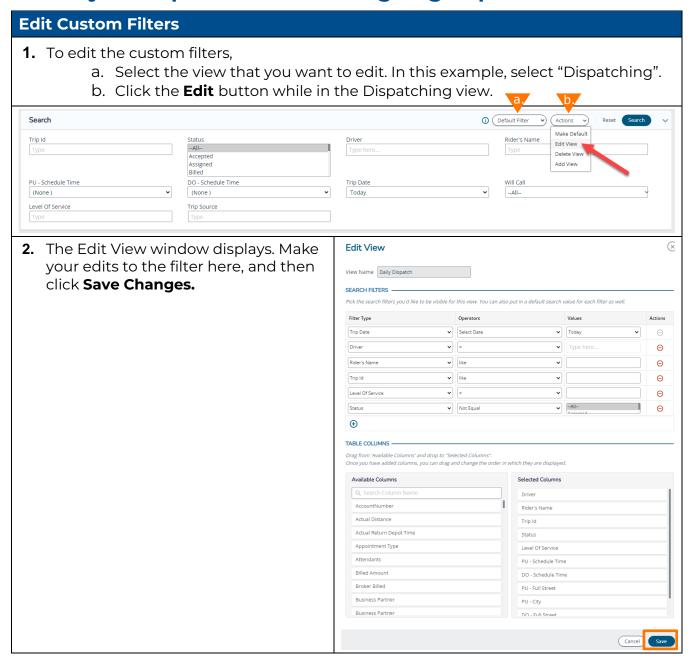
A list of trips displays that match the search criteria you entered for the Dispatching custom filter.





2. After you've applied the custom view, use the fields in the Search section to further define your search criteria. For example, if you want to search for this week's trips: a. Select **This Week** from the Trip Date Select Date drop-down menu. b. Click Search. Search (i) (abc123 Actions Trip Date Select Date Trip Id Driver Rider's Name This Week Status = Billed Broadcast Cancelled Completed The trips for this week will display in the Trips list. 2 Trips Add Trip(s) → Column Search (Export ▼) Assign Driver Un-Assign Driver Update Will Call More • Driver x A Anne ONeill Completed Anne ONeill x A Completed



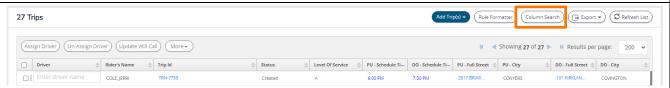




Search for a Trip

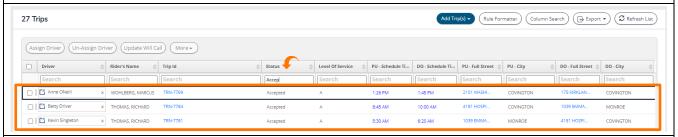
You can search data in a specific column using Column Search to easily find specific data.

1. To search for a trip from the Trips screen, click **Column Search**.



2. Your column search fields will appear under the column headings. This feature allows you to search data in a specific column directly in the results table.

For example, to search for all completed trips, type **Completed** in the search field under the Status column.



A list of the completed trips displays.

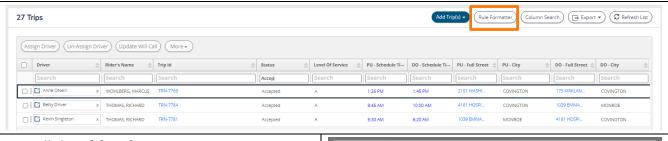
Note: You can organize your trips by any of the fields in the results; click on the up or down arrow next to each field name.



Color Coding a Trip's List

If you prefer to color code your search results, use the Rule Formatter. The Rule Formatter allows you to create rules that will flag rows and mark them with a specific color.

For example, to mark all the completed trips green, click **Rule Formatter**.



Rule Formatter

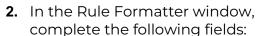
Rule Formatter

Completed

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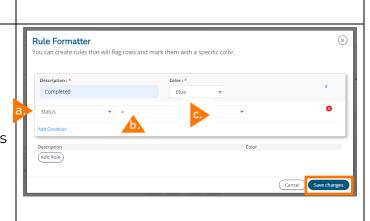
1. Click Add Rule.



- a. Description: Include a description of the filter being created. For this example, enter Completed.
- b. **Color:** Select **Green** from the drop-down menu.
- 3. Click Add Condition.
- **4.** Enter the following information for the condition, from the respective drop-down menus:
 - a. Field 1: Select Status.

entered in field 2.

- Field 2: Select =
 Note: The third field displays once information has been
- c. Field 3: Select Completed.
- 5. Click Save Changes.





Notice the trips with a status of completed have been highlighted in green. When you search for trips with a completed status, those rows will display in green as a visual indicator that they are completed trips.

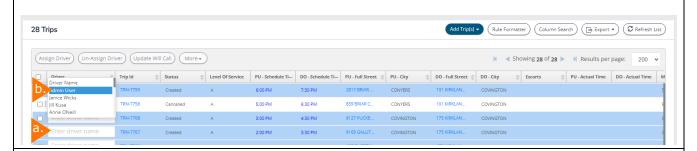




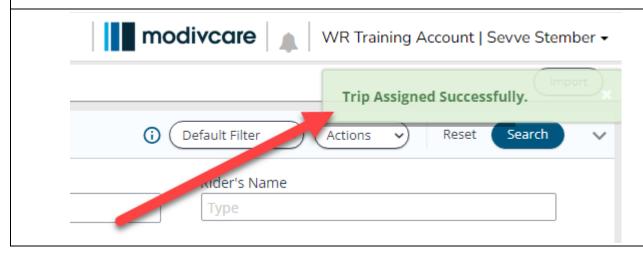
Assigning an Individual one Trip or Multiple Trips

After searching and filtering trips, you may need to assign them to your drivers. You can assign individual trips to a driver or multiple trips to one driver. Assigning multiple trips to one driver allows you to assign trips more efficiently and quickly.

- 1. To assign an individual a trip:
 - a. Click the Driver Name field to access the drop-down menu.
 - b. Select the specific driver's name you'd like to assign the trip. This will assign the trip real time to the driver.



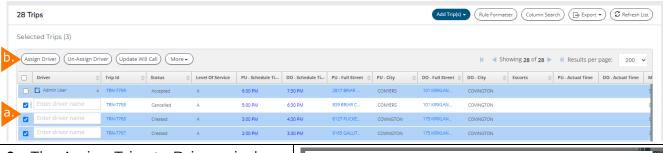
You will receive a confirmation message stating the trip was assigned successfully.



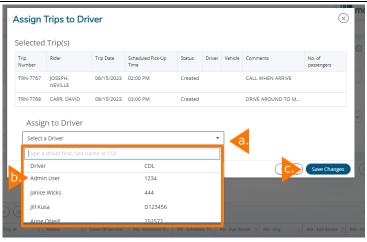




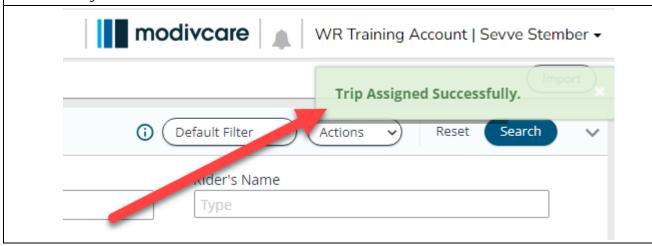
- **2.** To assign multiple trips to one driver:
 - a. Click the **check boxes** to the left of all the trips you'd like to assign.
 - b. Click **Assign Driver**.



- **3.** The Assign Trips to Driver window displays. To select the driver:
 - a. Click inside the Assign to Driver field (white box under Assign to Driver) to access a list of eligible drivers.
 - b. Select the **name of the driver** you'd like to assign the trips.
 - c. Click Save Changes.

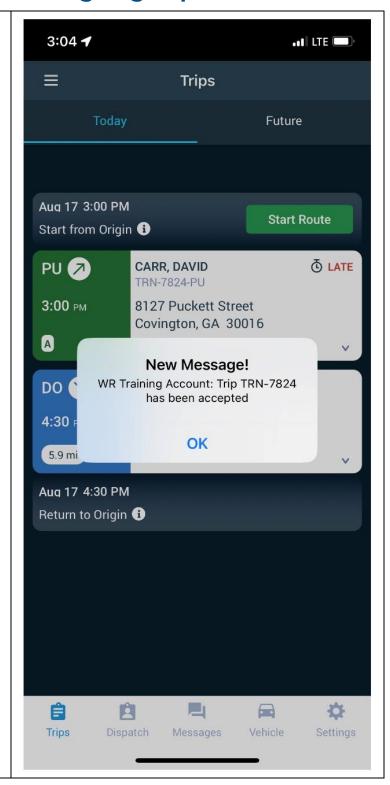


Whether you assign individual trips to a driver or multiple trips to one driver, once the trips are assigned, you will get a confirmation message stating the trips were assigned successfully.

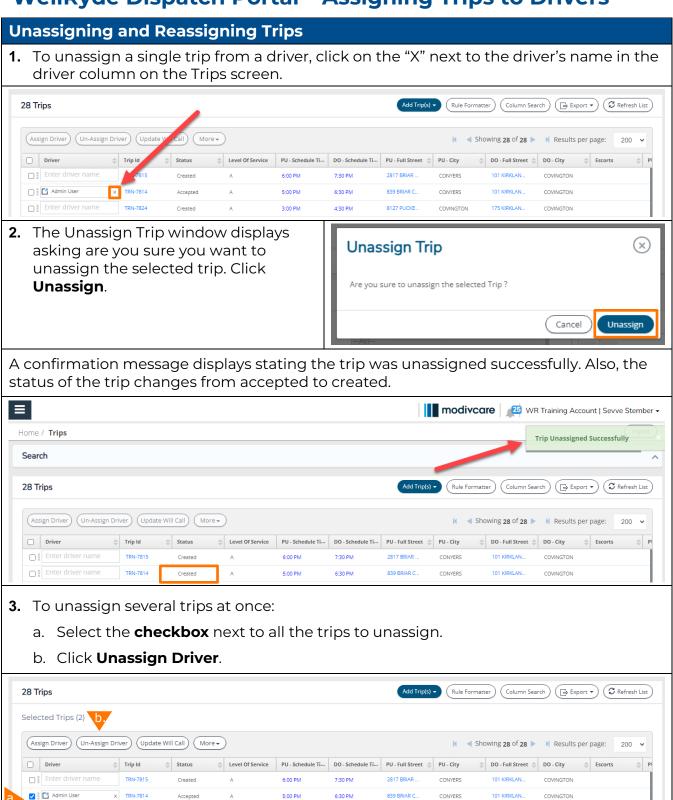




Also, the driver will immediately get a notification on their mobile app that a trip or trips have been assigned to them. The driver will still need to refresh their mobile app screen for the trips to appear.





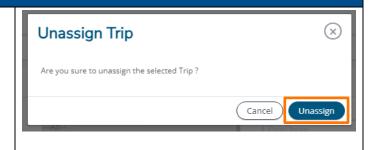


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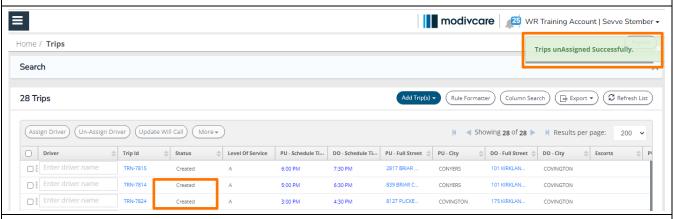


Unassigning and Reassigning Trips

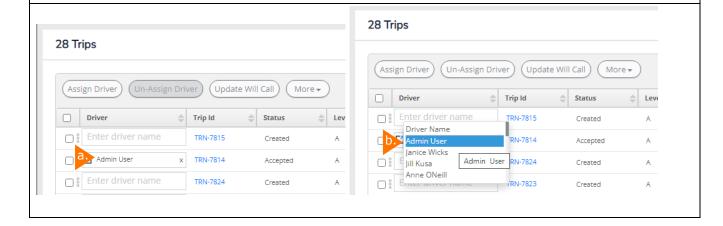
4. The Unassign Trip window displays asking are you sure you want to unassign the selected trip. Click **Unassign.**



A confirmation message displays stating the trips were unassigned successfully. Also, the status of the trip changes from accepted to created.



- **5.** If a trip is already assigned to one driver and you need to reassign it to another driver in real time,
 - a. Click in the **driver's name** field for the trip.
 - b. Select the **new driver's name** from the drop-down menu.





A confirmation message displays stating the trips were assigned successfully.

| MR Training Account | Sevve Stember - Trip Assigned Successfully.

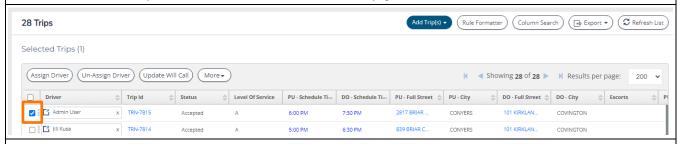
Note: To reassign in bulk, first unassign all the necessary trips, then reassign the trips in bulk just as you would assign them for the first time.



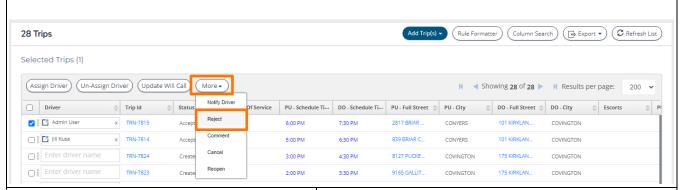
Re-route and Cancel Trips

There also might be instances in which you need to re-route a trip or cancel a trip altogether. Re-routing typically occurs when you receive trips in WellRyde from ModivCare and don't have enough drivers to fulfill the trips. Or you are outside of the specific service area, so you must send the trips back to ModivCare. This is also referred to as "rejecting a trip" in WellRyde.

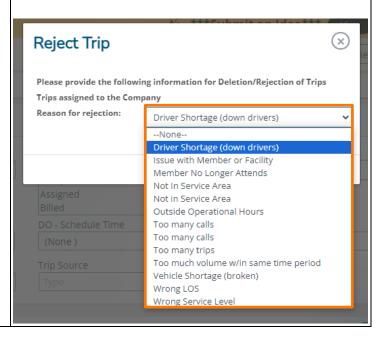
1. To re-route a trip, click the checkbox for the trip you need to re-route.



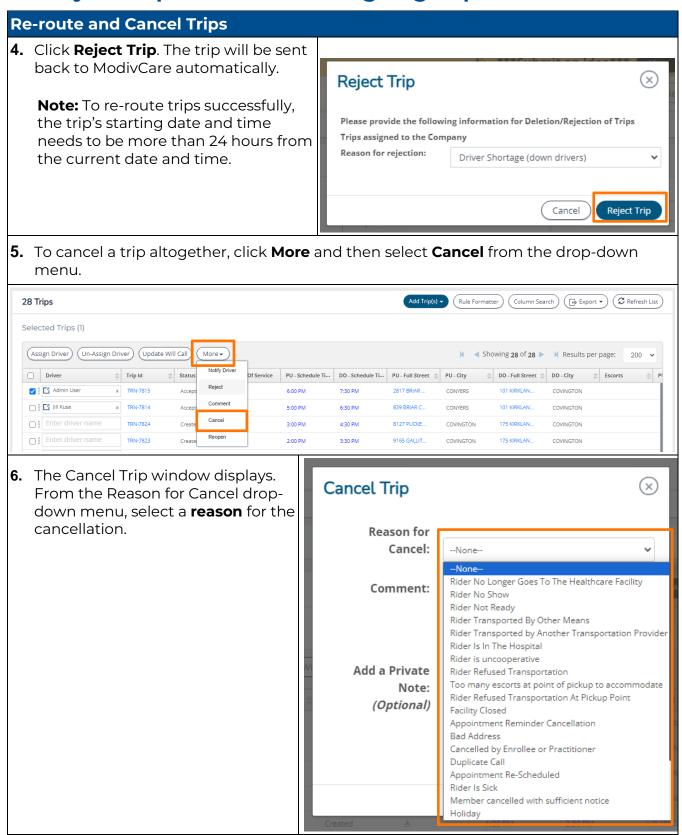
2. Click More and then select Reject from the drop-down menu.



3. Next, select a **re-route reason** description from the Reason for Rejection drop-down menu.









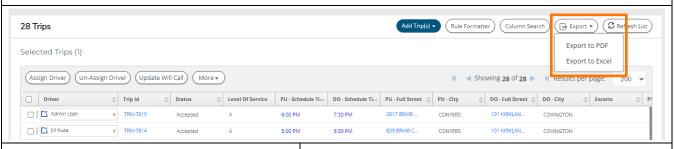
Re-route and Cancel Trips 7. Lastly, fill in a Comment, Add a Cancel Trip (x)Private Note (optional), and Click Cancel Trip. Reason for Cancel: --None--Comment: Add a Private Note: (Optional) 1000 characters remaining Cancel Trip Cancel



Export a Trip List

After you've finalized your trip list, you can easily export it from the Dispatch Portal and save it to your computer for your records. You can either Export to PDF or Export to Excel.

- 1. To export a trip list click the **Export** dropdown menu and select:
 - Export to PDF, OR
 - Export to Excel



2. The document will download to the Downloads folder on your computer. You will know the file is downloading when you see this image at the top right of your computer screen.

Below is an example of an opened PDF.

