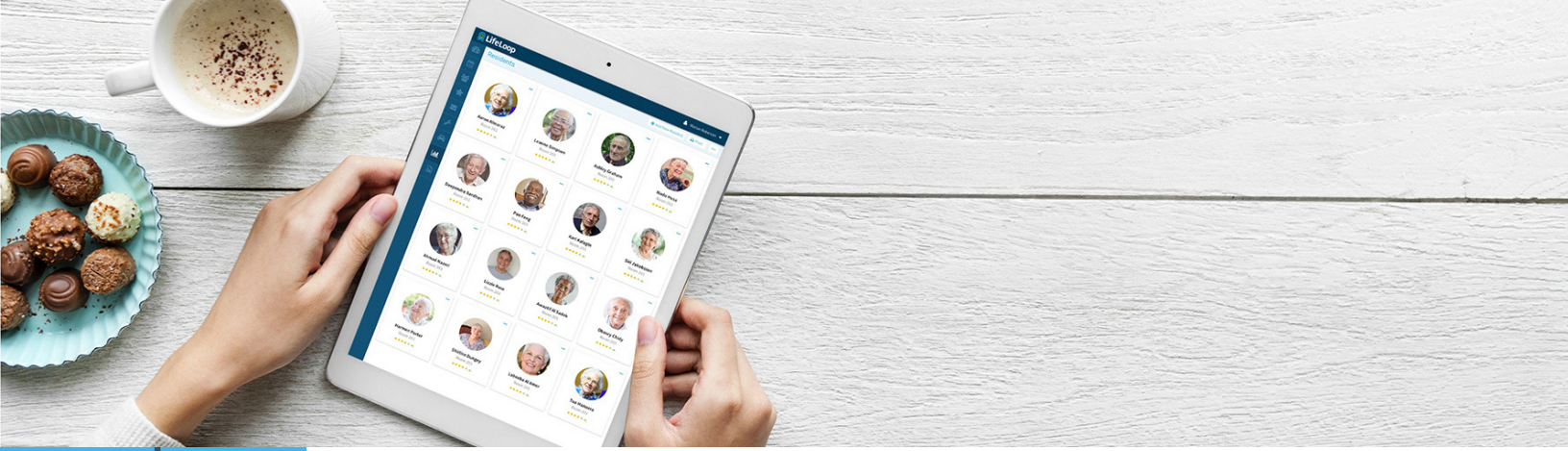


TRANSPORTATION

How to create a transportation request.



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TRANSPORTATION

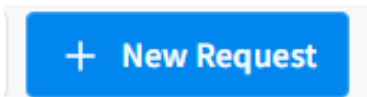
CREATING A TRANSPORTATION REQUEST

STEP 1

Go to Transportation in the feature menu on the left-hand side.

STEP 2

Click on **+ New Request** on the top right-hand corner. This will open the Create Request form.



+ New Request

STEP 3

Select if this is a Transportation request for the Community or for a Resident.



Resident

Community

STEP 4

For a Resident Transportation Request, choose one or multiple residents from the resident dropdown list.

Resident (required)



Choose Resident

TRANSPORTATION

CREATING A TRANSPORTATION REQUEST

For a Community Transportation Request, choose which community(s) the request is for in the community field.

Community (required)

STEP 5

Type in the Destination.

Destination (required)

STEP 6

Once a destination is inputted, suggested addresses will populate based on proximity to your location. Select the desired address. This will fill the Destination Address field. If the address does not pre-populate, input the address manually in the Destination Address field.

Destination Address

STEP 7

Input the total amount of miles driven in the Mileage field. This will show in the request details as well as in the transportation request export for reporting purposes.

Mileage

TRANSPORTATION

CREATING A TRANSPORTATION REQUEST

STEP 8

Enter the time and choose the date of the requested trip.

Appointment Time & Date (required)

10:00 am

04/15/2022

STEP 9

Select the Trip Type. "Will Call" means they will call when they are ready to return. Selecting "Round Trip" allows for a pick-up time to be added.

Trip Type

One-way

Will Call

Round Trip

STEP 10

Entering in the Departure Time and Departure Location is optional. Provide a Departure Location if departing from somewhere other than where the resident lives. Provide a Departure Time to allow drive time when scheduling and organizing the transportation calendar.

Departure Time

optional

Departure Location

Departure Location

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CREATING A TRANSPORTATION REQUEST


STEP 11

If this request is a recurring request, click on **Setup Recurring**. Then select how often this request will recur and click **Apply Changes**.

Recurring

[Setup Recurring](#)


STEP 12

Select the Type of Trip. This is the type of Transportation that will take place. Type options are pre-set in the  gear settings.

Type

Select... | v

STEP 13

Select the Vehicle being used. Vehicles are pre-set in the  gear settings.


Vehicle

Select... | v

TRANSPORTATION

CREATING A TRANSPORTATION REQUEST

STEP 14

Select the Driver. Drivers are pre-set in the  gear settings.

Driver

Select...



Note: To learn how to set transportation types, vehicles and drivers; refer to the document "Manage Settings-Transportation Types, Vehicles & Drivers" in the Learning Community.

STEP 15

Choose the Status of the request. If the staff member inputting the request has the Manage Transportation permission, they can set the status as approved upon creation.

Status

 Pending



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CREATING A TRANSPORTATION REQUEST

STEP 16

Input any mobility needs in the Mobility Needs field.

Mobility Needs

Wheelchair, Walker, etc.

STEP 17

Add any additional details regarding this request in the Additional Info field.

Additional Info

Add any additional info here

STEP 18

Once the new request form is completed, click **Create Request** on the bottom right-hand side.

Create Request

TRANSPORTATION

CONTINUED LEARNING



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FURTHER QUESTIONS?

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