



Daily Schedule Manual

This manual will explain the Daily Schedule's "Right Click Functions" in your Trip Master database. Right click functions are what schedulers and dispatchers use to carry out tasks, utilize functions/features, and make edits to the Daily Schedule.

The Daily Schedule is comprised of three main sections. The top box is the "Route Pen" (Driver/Vehicle availability). The middle box the "Display Pen" holds whatever trips are currently assigned to the driver highlighted in blue from the Route Pen. The bottom box is the "Holding Pen" which holds unscheduled trips.

*It is important to note that any changes or actions carried out on the Daily Schedule only affect the currently displayed date located in the top right corner of the daily schedule.

Route Pen

Display Pen

Holding Pen

18 rides in holding pen. 0 escorts. 0 children. 0 wheelchairs. 0 stretchers

Date	Search Text	Provider	Routes	Rides	Holding Pen	Advanced Filter						
02/05/2024												
<input type="button" value="AutoSchedule"/> <input type="button" value="TripScheduler (Beta)"/> <input type="button" value="TripCalendar"/> <input type="button" value="TripSync Ride(s)"/> <input type="button" value="Ride Requests"/> <input type="button" value="Geocode Day"/> <input type="button" value="Calculate Direct Drives"/> <input type="button" value="Refresh"/> <input type="button" value="More Options"/>												
Status	Sync	Route #	Description	Available Times	Driver	Vehicle	Mob	CurrentLoad	NextScheduledJob	Warning		
Not Validated	1	Dewey Caruthers	07:00-18:30	Caruthers, Dewey - 1432	1	A	A:0 W:0 S:0					
Not Validated	2	Bob Johnson	07:00-17:30	Johnson, Bob - 1234	2	A	A:0 W:0 S:0					
Not Validated	3	Max Smith	07:00-17:30	Smith, Max - 1000	3	A	A:0 W:0 S:0					
Not Validated	4	Rodney D	07:00-17:30	Dangerfield, Rodney - 5678	4	WC	A:0 W:0 S:0					
Cancelled	5	Fixed Route Test	07:00-17:00	None	4	WC	A:0 W:0 S:0					
Cancelled	6	Validation Test 1	00:01-23:59	Driver 1, Test	VALTEST1	A	A:0 W:0 S:0					
Cancelled	7	Validation Test 2	00:01-23:59	Driver 2, Test	VALTEST2	A	A:0 W:0 S:0					
Rides in route: 0 escorts, 0 children, 0 wheelchairs, 0 stretchers												
Status	Name	From	Pickup	Pickup Location	To	Dropoff Location	Drop	Priority	Mob	Actual Pickup	Actual Drop	Will Call
<input type="checkbox"/> No Status	Pre-Trip		07:00				07:05			00:00	00:00	N
<input type="checkbox"/> Not Validated	Alpha. Test Rider	Home:643 Kings Trail	07:00	Sunset Beach, NC 28468	Crow Creek Golf Course:240 Hickman Rd NW	Calabash, NC 28467	08:00	08:00 Drop	A	00:00	00:00	N
<input type="checkbox"/> Not Validated	Bravo. Test Rider	Test Home Bravo:1712 Angier Street Southwest	12:00	Ocean Isle Beach, NC 28469	Tigers Eye Golf Links:360 Ocean Ridge Pkwy SW	Ocean Isle Beach, NC 28469	13:00	13:00 Drop	A	00:00	00:00	N
<input type="checkbox"/> Not Validated	Alpha. Test Rider	Crow Creek Golf Course:240 Hickman Rd NW	13:00	Calabash, NC 28467	Home:643 Kings Trail	Sunset Beach, NC 28468	00:00	13:00 Pick	A	00:00	00:00	N
4 rides on route. 0 escorts, 0 children, 0 wheelchairs, 0 stretchers												
Status	Name	From	Pickup	Pickup Location	To	Dropoff Location	Drop	Priority	Mob	Acct	Will Call	Direct Drive
<input type="checkbox"/> Not Validated	Delta. Test Rider	Test Home Delta:402 Dolphin Street	00:00	Sunset Beach, NC 28468	Barefoot Landing Marina:4736 Highway 17 S	North Myrtle Beach, SC 29582	08:30	08:30 Drop	A	PP	N	20.02
<input type="checkbox"/> Not Validated	Hughett, Robert G	Home:1002 Main Street East	00:00	Sunset Beach, NC 28468	Glen Dornoch Golf Links:4840 Glen Dornoch	Little River, SC 29566	09:15	09:15 Drop	A	PP	N	9.23
<input type="checkbox"/> Not Validated	Hughett, Clay	Home:1004 Main Street East	00:00	Sunset Beach, NC 28468	Glen Dornoch Golf Links:4840 Glen Dornoch	Little River, SC 29566	09:15	09:15 Drop	A	PP	N	9.24
<input type="checkbox"/> Not Validated	Richardson, Ada	Home:1006 Main Street East	00:00	Sunset Beach, NC 28468	Brunswick Novant Medical Center:240 Hospital	Bolivia, NC 28422	10:00	10:00 Drop	CA, A	PP	N	22.62
18 rides in holding pen. 0 escorts, 0 children, 0 wheelchairs, 0 stretchers												



The Holding Pen: Holds unscheduled Reservations.

A screenshot of the TripMaster software interface. On the left is a list of reservations in a table with columns for Status and Name. The first row is highlighted in blue with a checked checkbox in the Status column. The names listed are Bob, Bob, Bob, Bob, Brinkley, Christy, Brinkley, Christy, Doe, Jon, Doe, Jon, and Fogerty, Bill. Below the table is a summary: 28 rides in holding pen, 14 escorts, 0 children, 13 wh. To the right of the table is a context menu with the following options: Seat Reservation(s), Add Reservation, Edit Reservation, Copy Reservation, Cancel Reservation(s), Admin Cancel Reservation(s), Deny Service, Print Reservation(s), Print Reservation Request(s), Map, Auto Seat Ride(s), and Export Reservation(s).

Status	Name
<input checked="" type="checkbox"/> Not Validated	Bob, Bob
<input type="checkbox"/> Not Validated	Bob, Bob
<input type="checkbox"/> Not Validated	Brinkley, Christy
<input type="checkbox"/> Not Validated	Brinkley, Christy
<input type="checkbox"/> Not Validated	Doe, Jon
<input type="checkbox"/> Not Validated	Doe, Jon
<input type="checkbox"/> Not Validated	Fogerty, Bill

28 rides in holding pen, 14 escorts, 0 children, 13 wh

- Seat Reservation(s)
- Add Reservation
- Edit Reservation
- Copy Reservation
- Cancel Reservation(s)
- Admin Cancel Reservation(s)
- Deny Service
- Print Reservation(s)
- Print Reservation Request(s)
- Map
- Auto Seat Ride(s)
- Export Reservation(s)

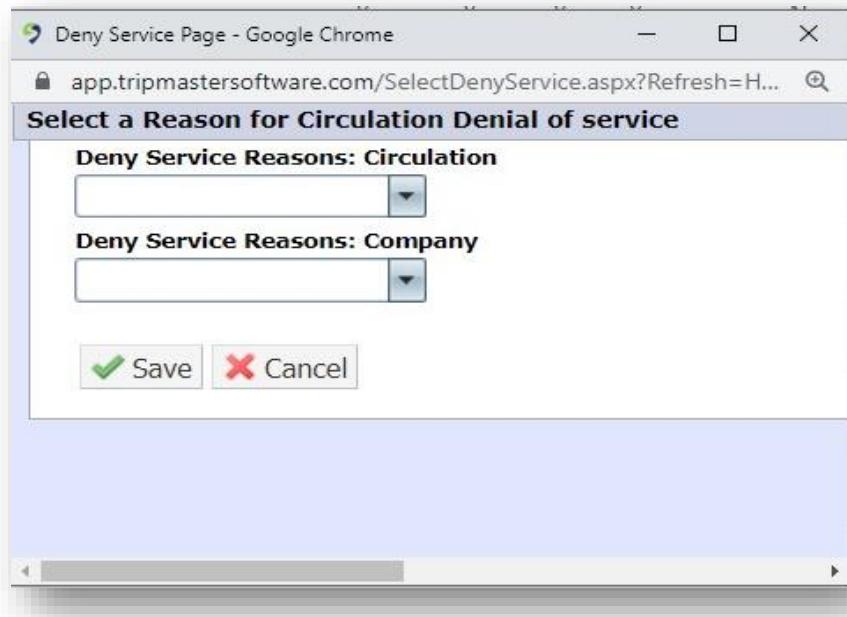
Note: Any right click functions with a "(s)" can be performed for one reservation, multiple, or all.

- “Seat Reservation(s)” - Moves a Trip/Trips from the holding pen to the selected driver/vehicle highlighted in blue in the top Route Pen.
- “Add Reservation” - Opens the reservation entry screen to add or select a rider in order to manually create a one-time “Demand” trip. Once created this reservation will appear in the holding pen for the date you created it for. ***Note*** Manually created Trips are not valid TripSync broker digitally billable Trips. This option is to be only used for other funding sources that don’t have an integration with TripMaster.
- “Edit Reservation” - opens the reservation you right clicked or double left clicked. This is for any editing needing done to a reservation for the date of the trip.
- “Copy Reservation” - Creates a copy of the reservation and places it in the holding pen. ***Note*** Copies of TripSync trips are not valid TripSync broker digitally billable Trips. This option is to be only used for other funding sources that don’t have an integration with TripMaster.



- “Cancel Reservation(s)”- Is used to Rider Cancel a Trip. You can undo this status by selecting “Mark as Not Validated.” TripSync Trips from the below listed brokers will cancel the trip in that portal as well as in TripMaster. And if the broker cancels the trip it will cancel in TripMaster automatically. (Alivi, Access2Care, Call the Car, ModivCare, MTM, RideHealth, and Tennessee Carriers). Trips from these TripSync brokers that have been cancelled cannot be undone and marked as “Not Validated” like other “Non-TripSync” trips.
- “Admin Cancel Reservations(s)” -Used to limit the trip from being counted in the TripMaster system as a valid Trip. This Trip will not count towards any billing or reporting numbers after “Admin Canceled”. You can undo this status by selecting “Mark as Not Validated”.
- “Deny Service” - Used to reroute a Trip from Access2Care, ModivCare, MTM, and Tennessee Carriers that were pushed by a broker into TripMaster. This will reroute them directly to those broker portals. Additionally, any trips that you or the broker reroutes in the broker’s portal will automatically reroute in TripMaster. You cannot undo a TripSync trip reroute.

When choosing Deny Service for a TripSync broker trip, you will be prompted to select from a list of denial reason from the broker. Choose the best option to your ability. This list is not customizable and set by the broker.





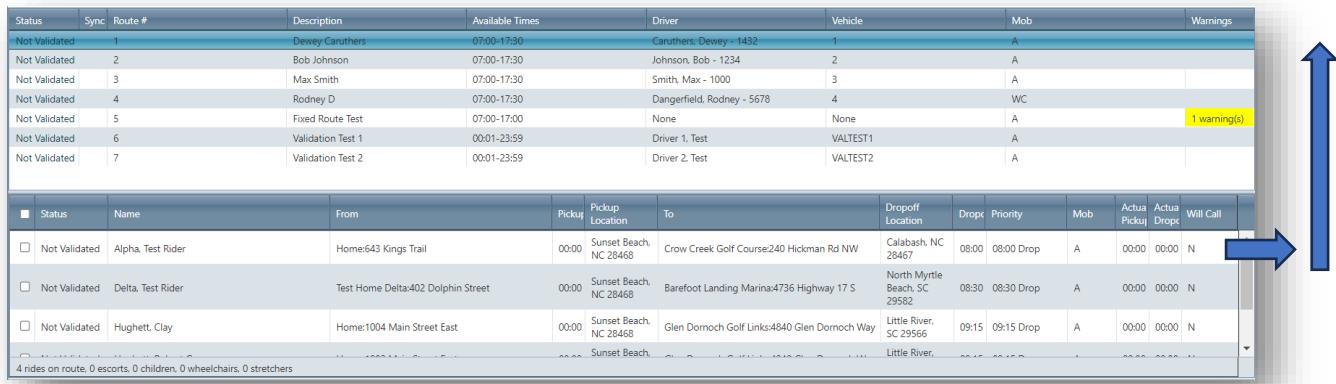
For regular trips “Deny Service” is used to deny/refuse a trip for any internal company reason. You can undo this status by selecting “Mark as Not Validated”.

For any denial you are prompted to choose an internal company denial reason as well. This list populates from what is present in the deny service Master Page and can be customized. This selection is not sent to the broker and is for your private use.

- “Print Reservation(s)” - allows you to export to excel and print the highlighted reservations basic data.
- “Print Reservation Requests(s)” - allows you to export to excel and print the highlighted reservations detailed information including rider information.
- “Map” – displays the highlighted Trip locations on the map.
- “Mark Ready” - If the trip is a Will Call this will time stamp the reservation, readying it for manual assignment or “quick seating”. Once a reservation is marked ready you can mark it Not Ready by choosing (Mark Not Ready)
- “Auto Seat Ride(s)” – is an outdated function that will be removed
- “Export reservation(s)” - exports the Trips highlighted to an Excel document.
- “Quick Seat Ride”- Runs a focused version of the Trip Scheduler for just one reservation. It will look at all Routes and try to find the two most efficient options for that reservation. If found, it will recommend the two for a Scheduler or Dispatcher to choose between.

The Display Pen: Displays whatever reservations are currently assigned to the Route highlighted in Blue located in the Route Pen above of the display pen. As this section is still dealing with Reservations, many of the Right Click Functions are the same.



The screenshot shows a software interface for managing trips and reservations. At the top, there is a table with columns: Status, Sync, Route #, Description, Available Times, Driver, Vehicle, Mob, and Warnings. Below this is another table with columns: Status, Name, From, Pickup, Pickup Location, To, Dropoff Location, Drop, Priority, Mob, Actual Pickup, Actual Drop, and Will Call. The data in these tables includes trip details like Dewey Caruthers, Bob Johnson, Max Smith, Rodney D, and validation tests. A blue double-headed arrow is placed on the right side of the interface, likely indicating a feature for navigating between different parts of the software.

- “Add Reservation” - Opens the reservation entry screen to add or select a rider in order to manually create a one-time reservation. Once created this reservation will appear in the middle assigned to the driver’s route you have highlighted in blue for the date you created it for.
Note Manually added Trips are not valid TripSync billable Trips. This option is to be only used for other funding sources that don’t have an integration with TripMaster.
- “Edit Reservation” - opens the blue highlighted Trip for any editing needing to be done.
Note Double left clicking will also open a reservation for editing.
- “Copy Reservation” - Creates a copy of the reservation and places it in the holding pen.
Note Copies of trips are not valid TripSync billable Trips. This option is to be only used for other funding sources that don’t have an integration with TripMaster.
- “Unseat Reservation(s)” - Places the reservation(s) back into the holding pen.
- “Move Reservation(s)” - Brings up a window to select a route to move the reservation(s) to.
- “Print Reservation(s)” - allows you to export to excel and print the highlighted reservations basic data.
- “Print Reservation Requests(s)” - allows you to export to excel and print the highlighted reservations detailed information including rider information.
- “Cancel Reservation(s)” - used to Rider Cancel a Trip. You can undo this status by selecting “Mark as Not Validated”.



- “Admin Cancel Reservations(s)” -Used to essentially delete the Trip from being counted in the TripMaster system as a valid Trip. This Trip will not count towards any billing or reporting numbers after “Admin Canceled”. You can undo this status by selecting “Mark as Not Validated”.
- “Validate” - Gives you the ability to manually Pickup, Dropoff, No Show, Un-Arrive Pickup/Resend Ride, Un-Arrive/Resend Dropoff.

The screenshot shows a software interface for managing trips. At the top, there is a menu bar with options like File, Edit, View, Tools, Help, and a Log Out button. Below the menu is a toolbar with icons for New, Open, Save, Print, and Exit. The main area is a table listing trips with columns for Status, Name, From, Pickup, Pickup Location, To, and Duration. A context menu is open over a row for 'Duck, Donald'. The menu includes options: Add Reservation, Edit Reservation, Copy Reservation, Print Reservation(s), Print Reservation Request(s), Validate, Pickup, Dropoff, No Show, Un-Arrive Pickup/Resend Ride, and Un-Arrive/Resend Dropoff. The 'Dropoff' option is currently selected.

Status	Name	From	Pickup	Pickup Location	To	Duration
No Status	Pre-Trip		06:15			
In Transit	Duck, Daffy	Home:100 E Morelia Ave NE	07:30	Knoxville, TN 37917	Davita Dialysis:500 S Kyle St	K 3'
<input checked="" type="checkbox"/> On The Way	Duck, Donald		07:45	Knoxville, TN 37912	Radiology:789 River Place Dr	K 3'
Not Validated	McDuck, Scrooge	McDuck Bank:639 Shamrock Ave	08:30	Farragut, TN 37934	K 3'	
Not Validated	Brinkley, Christy	Golds:303 Knoxville Ave	09:00	Knoxville, TN 37920	A 3'	
Not Validated	Fogerty, Tim	Wilson, NC	10:00	Center:1705 Tarboro St	V 2'	
8 rides on route, 0 escorts, 0 children, 1 wheelchairs, 0 pets						
Status	Name	From	Pickup	Pickup Location	To	Duration
Not Validated	Jordan, Michael	Coastal Orthopedics Dr. Jones:133	00:00			

- “Scheduling” - No longer has a function
- “Map” – displays the highlighted Trip’s location on the map.
- “Mark Ready” - If the trip is a Will Call this will time stamp the reservation, notifying the driver the Will Call is ready.

The Route Pen- Contains your “Subscription Routes”, best thought of as Driver and Vehicle availability slots. This will show your Routes with their description, time availability, Driver, Mobility the vehicle can assist with, and Current Load.

- “Add Route” - Adds a Route/Driver/Vehicle availability to the daily schedule for whatever day you are on.



- “Edit Route” - Opens the route to make any changes for the route and the date you are on.
*Note this only effects the date you are on and does not affect what is set up in Subscription Routes.
- “Cancel Route” - Changes the route status to canceled. Drivers will not be able to log into the route and the TripScheduler will not take this route into consideration for quick seating or TripScheduling.
- “Cancel Route and Assigned Rides” - This will cancel the route and any trips assigned to it will be marked to Admin Cancel. **Warning:** this function is almost never to be used except with approval from the Administrative Team.
- “Assignments” - Opens a box to assign drivers and/or vehicles to a route. Typically, only used by large fleets. Most customers use the edit route feature to assign or change a driver/vehicle due to it being faster and less steps. **Note:** this tool can be potentially dangerous, in that it can affect multiple routes at one time, it is strongly advised to make changes to Routes individually by using the Edit option.
- “Print Route Sheet” - Gives you the ability to print out a route sheet for the highlighted route and/or select routes or all of them at once. There are a number of Route Sheet options including basic dispatch logs and driver form variants.
- “Expired Reservations” - Shows any account tied to a rider and ride that is expired or expiring within 30 days.
- “Validate” Opens up Route Validation for the Route highlighted in blue. *Note- Use this option if you need to unvalidate a route by selecting unvalidate at the bottom next to the cancel button.
- “Uncancel Route” Changes the status of a canceled route back to Not Validated. The route can now be logged into by a driver.
- “Map” Pulls up a map that shows where the route is scheduled to go for the day as well as the total route direct miles of the scheduled trips for the day.
- “Map Rides” Shows a map with a pin dot for each Pickup and Dropoff location.
- “Force Log Off” - When a driver is logged into the ParaScope App this will force log them off the App.



Top buttons and boxes

Date	Search Text	Provider	<input type="checkbox"/> Routes	<input type="checkbox"/> Rides	<input type="checkbox"/> Holding Pen	<input type="checkbox"/> Advanced Filter
04/02/2024	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Clear Search Text"/>			
AutoSchedule TripScheduler (Beta) TripCalendar TripSync Ride(s) Ride Requests Geocode Day Calculate Direct Drives Refresh More Options						

- “More Options” - Gives the user three options for additional columns on the daily schedule. “Scheduled Route Times” Adds a column to the top box showing the routes scheduled start and end time. “Actual Ride Times” Adds two columns to the middle section that shows the Actual Pickup and Actual Dropoff done by the driver using the ParaScope App. “Direct Drive Distance” Adds a column to the holding pen that shows the direct drive distance of a trip.

Daily Schedule Overview														
Date	Search Text	Provider	<input type="checkbox"/> Routes	<input type="checkbox"/> Rides	<input type="checkbox"/> Holding Pen	<input type="checkbox"/> Advanced Filter	Daily Schedule Details							
AutoSchedule TripScheduler (Beta) TripCalendar TripSync Ride(s) Ride Requests Geocode Day Calculate Direct Drives Refresh More Options														
<input checked="" type="checkbox"/> Scheduled Route Times	<input checked="" type="checkbox"/> Actual Ride Times	<input checked="" type="checkbox"/> Direct Drive Distance	Status	Sync	Route #	Description	Available Times	Scheduled Times	Driver	Vehicle	Mob	CurrentLoad	NextScheduledJob	Warnings
Not Validated	1	102-AM	06:15-12:00	06:15-12:00	1, Driver - 42	101	WC/S	A:0, W:0, S:0						2 warning(s)
Not Validated	2	Dodge 1 -PM	12:01-20:00	12:01-20:00	Fogerty, Tim - 202	101	WC/S	A:0, W:0, S:0						1 warning(s)
Not Validated	3	Dodge 06 Van	04:00-16:00	04:00-16:00	3, Driver - 3	Vehicle 8	WC/S	A:0, W:0, S:0						
Not Validated	4	Route 4	05:00-16:00	05:00-16:00	4, Driver - 4	Vehicle 4	A	A:0, W:0, S:0						2 warning(s)
Not Validated	5	Route 5	11:00-22:00	11:00-22:00	5, Driver - 5	LDYWOLF	A	A:0, W:0, S:0						2 warning(s)
<input type="checkbox"/>	Status	Name	From	Pickup	Pickup Location	To	Dropoff Location	Dropoff	Priority	Mob	Actual Pickup	Actual Drop	Will Call	
<input type="checkbox"/>	No Status	Pre-Trip		06:15				06:20			00:00	00:00	N	
<input type="checkbox"/>	Rode	Duck, Donald	Home:365 Micro Way; M and M Ln	07:45	Knoxville, TN 37912	Radiology:789 River Place Dr	Knoxville, TN 37914	08:00	08:00 Drop	A	07:48	07:59	N	
8 rides on route, 0 escorts, 0 children, 1 wheelchairs, 0 stretchers														
<input type="checkbox"/> Status	Name	From	Pickup	Pickup Location	To	Dropoff Location	Dropoff	Priority	Mob	Acct	Will Call	Direct Drive		
<input type="checkbox"/>	Not Validated	Jordan, Michael	Coastal Orthopedics Dr. Jones:133	08:00	Knoxville, TN 37920	Home:36 Caledonia Ave SW	Knox, TN 37916	00:00	08:00 Pick	A	MC	N	2.31	
<input type="checkbox"/>	Not Validated	Tim, 8888Tiny	Home:3256 Forest Hills Rd SW	08:00	Wilson, NC 27893	Davita :1605 Medical Park Dr	Wilson, NC 27893	10:34	10:34 Drop	A	PVT	N	2.73	
<input type="checkbox"/>	Not Validated	Joel, Billy	Home:420 Bearden Pl	10:00	Knoxville, TN 37917	Piggly Wiggly:715 Leroy Ave	Knoxville, TN 37921	11:00	11:00 Drop	WC	MC	N	0.70	

- “Refresh” - Refreshes and updates the daily schedule to reflect real time information.



- “Calculate Direct Drives” - Used before running the TripScheduler to ensure the reservation locations for the day distances are recognized.
- “Geocode Day” - Used before running the TripScheduler to ensure all the locations for the day are recognized on the map. We will see this in action in our third training session covering the TripScheduler.
- “TripSync Ride(s) - This will show the log of reservations coming in through the integration with a broker.
- “TripCalendar” - Is an alternative view of the daily schedule. You can do everything there that you can do on the daily schedule.
- “TripScheduler” - This is our routing solution we will be training on in its own session.
- “Date” Indicates what day you are looking at on the Daily Schedule
- “Search Text” You can search for a rider, location, driver or vehicle. After entering the search criteria for rider and location searches check the “Rides” box and “Holding Pen” box to filter the daily schedule to see just those results. For a driver or vehicle only check the “Routes” box.
- “Clear Search Text” - Clears the text entered in the search text box
- “Provider” - Gives you the ability to filter the daily schedule by provider if they are assigned to routes and/or riders/rides.
- “Advanced Filter”- Allows you to dictate what you see on the daily schedule screen. If you uncheck a route or trip status any route or trip with that status will be removed from being viewed on the daily schedule. They are not going anywhere, just being hidden. To remove the filter use “clear filter” or check the boxes back that were unchecked, and everything will be back viewable.