Scheduler's Handbook

Edition of November 2024
[by Nan DeLany and Bob Pierce]

(Filename = BVCV Scheduler's Handbook - Edition of November 2024 - as of 111124 1250)

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Bella Vista Courtesy Van Info

Phone	**479 855 7663**
Office Physical Address	**1801 Forest Hills Blvd #120, Bella Vista AR 72715**
Website	**bellavistacourtesyvan.com (pw = bvcvv)**
Email Address	**bvcvan@gmail.com**
Facebook Page	**facebook.com/bellavistacourtesyvan**

BVCV Board Meetings	2nd Thursday of even months, 8:15 am - 11:00 am at Boardroom, BVCV office building
BVCV Scheduler Meetings	The Monday, Tuesday or Wednesday prior to each Board Meeting, 10am - 12pm at Boardroom, BVCV office building

Drivers' Team and System Contacts

Courtesy Van Office, 1801 Forest Hills Blvd #120, Bella Vista AR 72715	479 855 7663
Drivers' **Silver** Phone Drivers' **Red** Phone Drivers' **Black** Phone	479 202 1972 479 202 3306 479 202 3621
Phyllis Rice, Driver Coordinator	713 724 1714
Curt Rowland, Driver Coordinator	479 366 3942
Bob Pierce, System Administrator, Publisher, bob.pierce.555@gmail.com	337 489 4555

Board Members & Duties for FY2025

Mark Brightwell	Board, President	501 472 2975
Bill Puskas	Board, Vice President	402 981 1571
Galen Thiele	Board, Secretary	479 644 9507
Amy Connelly	Board, Treasurer	802 279 8708
Nan DeLany	Board, Scheduler Coordinator	479 282 5173
Phyllis Rice	Board, Driver Coordinator	713 724 1714
Curt Rowland	Board, Driver Coordinator	479 366 3942
Steve Skaggs	Board, Maintenance Coordinator	417 793 2599
Steve Alge	Board, Website Coordinator, Phone Administrator	479 366 8984
Kim Carlson	Board, Golf Tournament Chair	816 916 8834
Chuck Janzen	Board	479 256 5372
Curt Stoops	Driver Training	479 426 8414
Bob Pierce	Systems Administrator	337 489 4555

BVCV Scheduler and Publisher Roster (as of 110424)

Team Member	Inits	Address	Zip	Phone	Email
Judy Carter	JEC	13 Newnham Ln	72714	501 472 4214	jayelaine@yahoo.com
Roberta (Bert) Dale	RGD	19 Parkridge Dr	72715	479 418 6698	gregrobertadale@cox.net
Nan DeLany (Scheduler Coordinator, Publisher, Email Manager and Dialysis Coordinator)	NKD	20 Salisbury Dr	72714	479 282 5173	nandelany@gmail.com
Cathy Downard	CCD	39 Cambria Dr	72715	479 659 8100	cathydown62@gmail.com
Robin Jara	REJ	8 Kilsyth Lane	72715	208 350 8184	rjidaho@live.com
Pat Johnson	PAJ	1600 S Southeastern Ave #204 Sioux Falls SD	57103	605 949 2941	patldj@hotmail.com
Stephanie Kappel	SLK	16 Mason Ln	72715	918 521 9673	slkappel@prodigy.net
Doni Perkins	LDP	501 Steepro Dr Centerton	72719	573 819 6073	perkinsladonna@gmail.com
Bob Pierce (Publisher)	RFP	62 Magrath Dr	72715	337 489 4555	bob.pierce.555@gmail.com
Jan Smith	JKS	1 Bacton Ln	72714	315 447 8651	janetsmith0841@att.net

Scheduler Cell Phone Guidelines

Providing cell phones for our Schedulers is done to protect your personal phone number from becoming known to our Riders. Avoid making calls to Riders from your personal phone.

- <mark>All BVCV Scheduler cell phones have the same screen password of 2 4 6 8</mark>. Click on the green arrow.

- The phones are for BVCV business only. Please do not set up or enter any personal information.

- Do not add apps or other accounts to your Scheduler Cell Phone.

- Each BVCV cell phone has a voice mail announcement notifying the caller not to leave a message but, rather, to call the BVCV office phone number, 479 855 7663.

- Please do not answer your phone unless you are working.

- You should answer your BVCV cell phone during your shift, especially in the morning from 7:00 AM through 8:00 AM. Riders who didn't answer your confirmation call may call you back and Drivers may call with a request.

- Suggestion - leave phone turned off while not using it for BVCV business.

- Do not respond to messages left on your BVCV cell phones. Though this can be difficult, each phone has a voice mail recording instructing Riders not to leave a message and to call the office voice mail instead. All ride requests need to go to the Office phone number, 479 855 7663. The more we remind our Riders of this, the better.

- Delete all messages and calls on your BVCV cell phone after each session.

Accessing Voice Mail

BVCV Office Phone Voice Mail

From your BVCV cell phone

(1)   Dial office number **479 855 7663** or click on Contacts icon, then click on BVCV Office

(2)   Press * (star) when you hear the recorded greeting

(3)   Enter the password 1 2 3 4 5 6 7

(4)   Follow the voice prompts

- Press **#** to skip to the next message
- Press **4** to replay
- Press **5** for time/date and phone number of message **(very handy at times)**
- Press **7** to erase the message (If you erase a message in error, do not hang up. When you reach the end of new/skipped messages the system will allow you to access erased messages.)
- Press **9** to save message

(5)   Besides messages from <u>Riders</u>, it is possible that you'll hear messages from <u>Drivers</u> also. This is the way Drivers will communicate information about changes in a day's Schedule that Schedulers need to know. For example: a ride that was canceled by the Driver or canceled by the Rider after the Schedule was published. Update the System to accurately reflect that information.

Scheduler's Cell Phone Voice Mail

(1)   Press and hold 1

(2)   Enter your password 7271514

(3)   Follow the voice prompts

General Scheduling Guidelines

- ➢ Any <u>Bella Vista resident</u>, at least 18 years of age, can become a Rider (excepting Concordia residents who have their own transportation system). Persons under 18 are not allowed to ride in a Van.

- ➢ Appointments with destinations <u>in Bella Vista or Centerton</u> may begin at 8:30 am through 3:30 pm, with return no later than 4:30 pm.

- ➢ Appointments with destinations <u>in Bentonville or Rogers</u> may begin at 9:00 am through 3:00 pm, with return no later than 4:00 pm

- ➢ <mark>**Riders may schedule a maximum of 3 trips per week**</mark>

- ➢ Rides involving <u>any type of anesthesia</u> (including General or IV Sedation) are not allowed.

- ➢ Multiple daily rides must be back-to-back; no home trips between them. Such rides are counted as TWO rides for purposes of the Rider weekly-limit of 3 per week.

- ➢ Maximum total rides per day is 10 (but, does not include additional riders such as caregivers).

- ➢ Appointment Requests: Eligibility
  - ○ There must be at least a full business day (M-F, excluding holidays) between the date of the request and the appointment date
    - ■ Examples
      - A request heard on Monday would be eligible for an appointment on Wednesday
      - A request heard on Friday would be eligible for an appointment on Tuesday
      - A request heard on Friday, with Monday a holiday, would be eligible for an appointment on Wednesday
  - ○ Appointments can be scheduled up to 2 months in advance.

- ➢ <mark>**For dialysis appointments**</mark>, because they are critically important and frequent, we have a designated Scheduler ("Dialysis Coordinator"). Forward any dialysis-related information to our Dialysis Coordinator.

- ➢ For hair salon appointments, the salon must be within Bella Vista (except for Salon Dia in Jane, MO).

- ➢ <mark>**Medical appointments always take priority!**</mark> If there is a conflict, Riders with non-medical destinations may be asked to reschedule. If rescheduling a non-medical appointment in order to schedule a medical ride, please try to reschedule the non-medical ride promptly and courteously.
- ➢ <u>No more than two appointments starting in a 1-hour time block.</u> A maximum of TWO Riders are allowed to START rides from Bella Vista in each 1-hour time period. A "1-hour time block" is defined to be times that share the same hour designation.
  - ○ Examples
    - ■ Any time from 10:00 - 10:59 is in the 10th hour block
    - ■ Appts at 9:45 and 10:00 are in 2 separate hour blocks

- ➢ Consider the number of <mark>**return**</mark> rides within a 1-hour time period. Return pickup times can be adjusted by the Drivers if need be; however, too many return trips in a given time period could make it difficult to complete the schedule. For example, a group of returns at 2:00, 2:15, 2:45, and 3:15 may prove to be too many for the Drivers. For guidance, you may check with a Driver Coordinator.

➢ Always include <u>destinations</u> for appointments. Whenever possible, use the auto-fill destination record already existing in the System. <u>If a new destination is required</u>, manually enter it for this appt, and then email the information to the Publisher, who will add the record for future use.

How & When to Say No, or Ask a Rider to Make Changes

- The Bella Vista Courtesy Van expects all our Volunteers to be treated with respect. You are not obligated to speak to anyone who is belligerent or disrespectful. It's rare that this would occur, but if a conversation gets too heated, end it politely by letting the caller know someone else will need to get back to them, then contact the Scheduler Coordinator.

- If necessary, don't be hesitant to say no to a Rider requesting a ride. Most Riders understand if we politely ask them to reschedule their appointment to a different time or day.

- Remember that MEDICAL rides take priority over non-medical appointments even if the non-medical appointment was already scheduled. It is OK to ask a Rider that is scheduled for a non-medical ride to reschedule.

- Consider whether we might take a Rider to their appointment earlier or pick them up later in order to accommodate the schedule. Often Riders do not mind doing so if it means they can keep their appointment and get a ride.

- If we can't accommodate the entire trip, consider whether we might assist the Rider for just half their transport. Might we take the Rider to their destination only or pick them up for the return trip home?

- Even if a Rider's request complies with our 1-day advance rule, that is not a guarantee we can schedule their request. Always encourage our Riders to call well in advance of their appt date.

Weather Closings

For the most part, we follow Bentonville Public Schools' closure schedule. If they close due to weather, the Van services will not run that day. If you are scheduled to work and suspect we might be closed on the day for which you're confirming but have not heard for certain by 5PM, please check with the Scheduler Coordinator or the President to confirm. The President of the Board will make the final decision.

If the Courtesy Van cancels services, please call each Rider on the schedule for the canceled date to let them know, then cancel each ride making a note in the *Notes for this appointment* field, "CV canceled due to weather <your initials> <date>".

When canceling an appointment, choose the Cancel drop down menu from the appointment line item and choose Y.

The Courtesy Van Service Area Map

The Courtesy Van travels as far North as Salon Dia in Pineville MO; as far south as I-49 exit 81, Pleasant Grove; as far east as Dixieland Road; and as far west as Centerton's Main Street.

We have <mark>TWO EXCLUSION ZONES</mark> **(the red X's on the map)** that we DO NOT service: Pinnacle Hills Mall and Village On The Creeks.

Notice that you can <mark>SEARCH</mark> for a place in this map, which is useful to pinpoint a destination or Rider's address location.

To view a Video about how to use this button, put this link in your browser: https://youtu.be/fuo8YBGyBLM
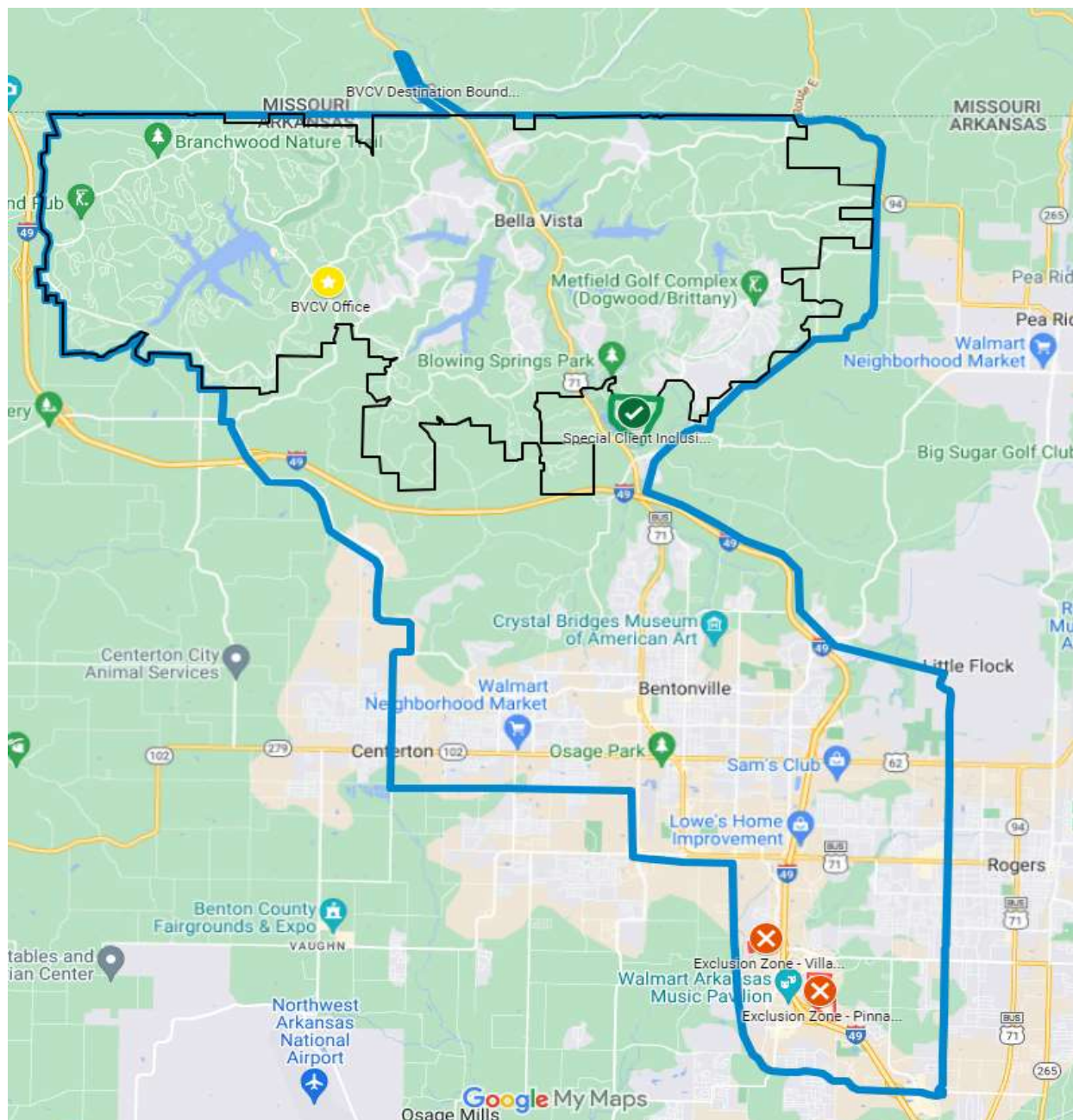
Overview of a Scheduler's Workflow

(1) Your day begins at 7am with checking the voicemail messages for any cancellations or changes to the current day's Schedule. If any rides have not been confirmed, this is the time you will try to confirm those. After everything is verified, notify the on-duty Publisher (noted on the monthly calendar) that the schedule is ready to go.

(2) Make yourself available for any Driver's calls until 8am. You may also take this time to process any new voicemail messages that have come in for future rides or changes.

On your calendared day: by 5pm (but see ** below for special Friday and Sunday procedures)

(3) At your leisure throughout the day, check the voicemail messages for any new requests and process as received. You may do this at any time that is convenient for you. You may wait until you do the confirmations if you wish.

(4) By 5pm confirm all rides for the following day. Confirmations are important, so make your best effort to reach each Rider. But, it does happen that, for many reasons, a Scheduler sometimes isn't able to confirm a ride on the Schedule. In that case, move on and leave that ride unconfirmed. Drivers will decide whether to pick up any unconfirmed riders. At 5pm (or sooner) notify the on-duty Publisher of the status of the Schedule.

(5) If the confirmation process is complete and the voicemail(s) have been handled, you are done for the day, and you can turn off your phone. If not, finish the voicemail requests and try again to confirm any rides you were unable to confirm previously. If after several attempts you are unable to confirm a rider, leave it and notify the next day's Scheduler. You are then done for the day so you can turn off your phone.

(6) Delete all messages you have worked from the Office voicemail.

(7) Sign off the system by clicking on "Go to Switchboard". Click on "Exit and Quit". Open the System again, click on the profile icon in the upper right corner. Click on "Sign Off". This procedure releases your ID to be used by the next Scheduler.

**On Fridays, you will not confirm the rides for Monday. (This will be done by the Sunday scheduler). You will, however, respond to and process all requests that come in on Friday.

**On Sundays, you are responsible for Steps 3, 4 and 5 only.
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The BVCV System - Filemaker Pro (Claris) Assigned IDs and PWs

[Claris is a subsidiary of Apple and owns Filemaker Pro. The names are used interchangeably.]

The BVCV has a limited number of licenses for our system; therefore, Scheduler's share user IDs and passwords. To manage this, we have assigned user IDs to days of the week based on the day for which you are confirming appointments.

For example, if you are working on Monday afternoon and Tuesday morning to confirm appointments for Tuesday, use the user ID and password for Tuesday. If you are working on Thursday afternoon and Friday morning to confirm appointments for Friday, use the user ID and password for Friday.

Login using the user ID and password that corresponds to the day for which you are confirming appointments.

Day for Which You Are Confirming Appointments	User ID	Password
Monday, Wednesday and Friday	bvcvmwf@gmail.com	BVCVschedMWF1
Tuesday and Thursday	bvcvtth@gmail.com	BVCVschedTTH1
When not on the schedule but need to login	bvcvextra1@gmail.com	BVCVschedEXTRA1

# BVCV System Screens and Functions

Accessing the BVCV System (Claris)

[Claris is a subsidiary of Apple and owns Filemaker Pro. The names are used interchangeably.]

 (A)   Log in to BV Courtesy Van Scheduling System
        (1)   Open File Maker Pro (click on app icon [icon] or [icon] in your taskbar at bottom of screen).

        (2)   View Claris ID showing in the upper right hand corner of the window, next to the profile icon. Refer to the above table (on this page) for the assigned IDs and PWs.
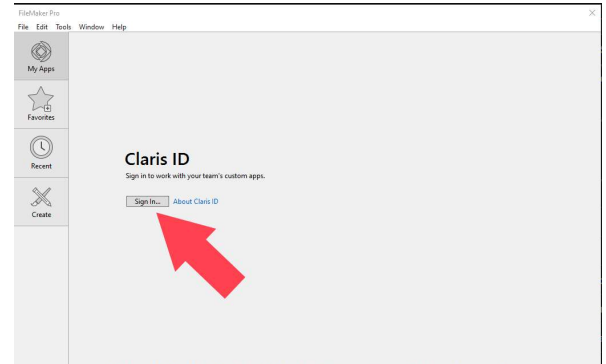

                (a)   If this is your "assigned" Claris ID, skip to step (3)
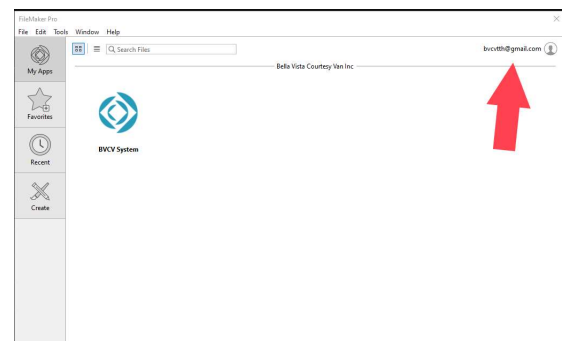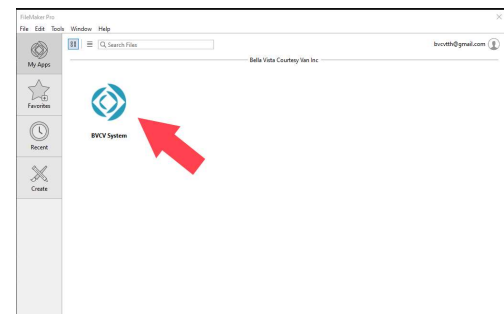
(b)   If this is different from your "assigned" Claris ID for your work day, click on profile icon, then click on "sign out"

(c)   A new Claris sign-in window appears. Click on "sign in".
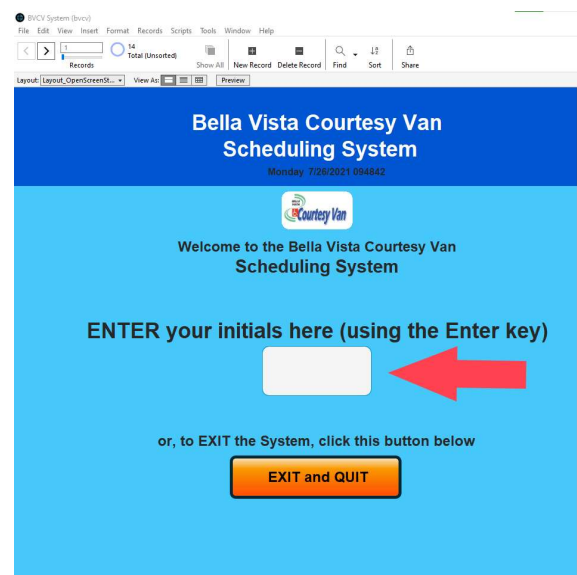
(d)   Enter "assigned work day" <u>User ID</u> and click "next". Enter "assigned work day" <u>Password</u> and click "sign in".

(3)   Double click on BVCV logo or Claris logo

(B)   You'll now see the Welcome screen. Enter your 3-letter initials and <u>press your keyboard's "Enter" key.</u> This will take you to …
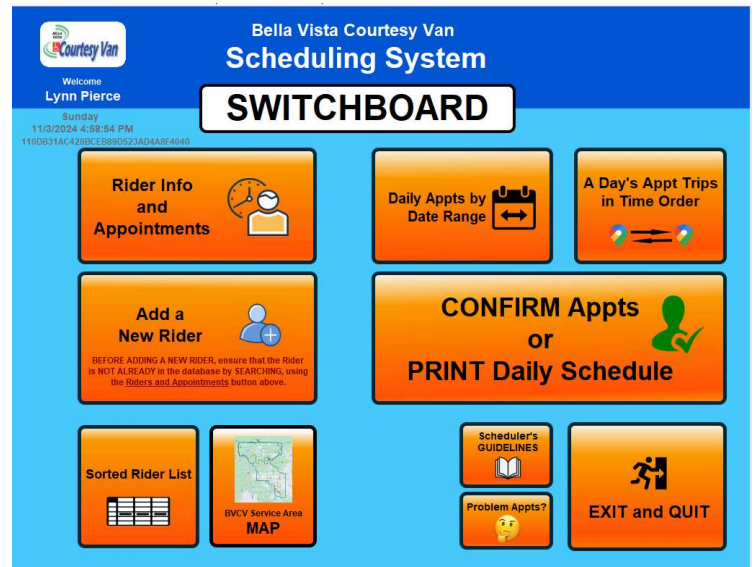
The SWITCHBOARD

This is the main screen that serves as the gateway to all others.

Notice the BVCV logo at upper left corner.
Below that you will see your name, date-time and the 32-character ID of your computer.

To help focus a new Scheduler's learning, here are brief descriptions of each of the 10 Buttons on the SWITCHBOARD

Button	Probable Usage Frequency	Description
Rider Info and Appointments	High	Main screen where most of a Scheduler's detail work is done
Confirm Appts or Print Daily Schedule	High	Used to check date-time availability and to record next-day confirmations. Appts ordered by Start Times.
EXIT and QUIT	High	To end work with the System
Add a New Rider	Medium	Add a new Rider to the System
BVCV Service Area Map	Medium	Check locations for servicing by BVCV. **To view a Video about how to use this button, put this link in your browser:** https://youtu.be/fuo8YBGyBLM
Scheduler's Guidelines	Medium	Easy reference for Scheduling Guidelines
Daily Appts by Date Range	Medium	A format preferred by some Schedulers to check a date-time availability
Day's Appt Trips in Time Order	Medium	A different arrangement of a day's appointments. Start and End times are displayed in order. **To view a Video about how to use this button, put this link in your browser:** https://youtu.be/ljH2U9rbtDQ
Sorted Rider Lists	Low	A utility that presents Rider data in various sort orderings
Problem Appts	Low	A utility to discover problems

Rider Info and Appointments

This is to get to the main "workhorse" screen of Scheduling where you have all the specific information for a Rider and where you can make most changes.

Searching for A Rider

(1)   To locate a Rider's info, click in the **Search For** field. A drop-down window appears which you can scroll through. You also have the option to start typing the last name of the Rider and when the name comes up, hit "return", "enter" or "Tab" on your keyboard. If the Rider name is <u>not</u> found, go to Add A Rider in the next section.

Rider Demographics and Basic Information

(2)   **Active?** Y = active; N = not Active.
Rider ID: system generated (you can't change this). If an inactive Rider is asking to schedule, contact the System Administrator.

(3)   **Address**: if you need to change the Rider's address, contact the System Administrator.

(4)   **Phone**: If you need to change the number, enter the new number with the style you are most comfortable with - but, we have found that using spaces are easier to read: ### ### ####. <u>Always</u> include the area code.

(5)   **Emer**: enter the name and phone number of an emergency contact (relationship is optional, but preferred). The more information about the emergency contact, the better.

(6)   **Special Needs**: you have a drop down menu in each of the five fields. Choose as appropriate for this Rider.

(7)   **Rider Notes**: these are notes which remain the same for each ride. Examples: "honk from driveway", "steep driveway", "daughter will follow in car". Also use this field to note when a Rider is normally accompanied by a Caregiver.

(8)   **Firehouse Directions**: system generated. Do not try to change this field, even if it is blank.

Enter or Change an Appointment

(9)   **To enter an appointment, choose the blank line**. (You may have to scroll down to get to the blank line.) Click the date field and a calendar pops up. Make your choice and continue working through appointment start time, end time, type, destination, etc.. Note that there are also "Take Only" and "Pick Up Only" options available. To view a **Video** **about checking the Schedule from this screen, enter this link in your browser:** **https://youtu.be/yeKqmVyMfRs**

(10)   **Destination**: If the Rider's <u>destination</u> is not available in the drop down window, type in the new address - then notify the System Administrator of the address you added so it can be added to the auto-fill field for the future. Be thorough - with full address (including zip code) and phone number.

(11)   **Notes for This Appointment**: this relates to this <mark>one ride.</mark> It could be a note like a "plus 1 rider", etc.. This is also the place to enter the reason for a cancellation, such as " Rider canceled" or "BVCV canceled". Remember to add your initials and the date.

(12)   **User ID**: system generated

(13)   **Cancel?**: enter Y if you need to cancel the ride - then it will automatically not appear on Drivers' schedules. To preserve our database integrity, <mark>there is no way to DELETE a ride</mark> - you must use this Cancel procedure. In that APPT NOTE, be sure to record the <u>reason for the cancellation, your initials and the date.</u>.
<u>AND it is perfectly fine</u> if you are canceling this entry because you made an entry error and want to start over. We ALL make mistakes.

(14)   As you change the **Cancel?** field from "N" to "Y", the system will present a reminder for you to enter the Reason, the Date and your initials to explain the cancellation. Doing this is important because we track Cancellations for analysis.
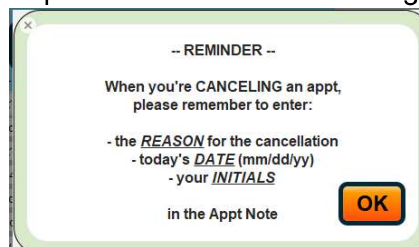
Also notice that when you cancel an appointment, many of the fields in that row are colored red. This is to make subsequent inspection of that appointment's cancellation easier to discern.

(15)   CHANGES TO A SCHEDULED RIDE?
Once an appointment has been entered and the scheduling confirmed with the Rider, do not make any changes to the existing appointment. Instead, cancel the existing ride and set up a new ride entry. This allows us to accurately track cancellations and reschedules. Remember - be sure to make a note in the appointment describing why the appointment was canceled or changed (and your initials and the date).

Canceling An Appointment

When canceling an appointment, choose the Cancel drop down menu from the appointment line item and choose "Y". Notice that when you cancel an appointment, many of the fields in that row change to red. This is to make subsequent inspection of that appointment's cancellation easier to discern.

Make a note indicating why the appointment was canceled, your initials and the date

Criteria for New Riders

To be added to the system, new Riders must live in Bella Vista. We also need the following information:

● First and Last Name

● Street address, phone number

● Any physical or mobility issues (blindness, using a walker, in a wheelchair, oversized wheelchair, etc)

● Name and number of a person we may contact in case of an emergency

Before Creating a New Rider Record, Search for an Existing Record!
Using the Riders and Appointments screen, make sure the person is not already a Rider. This check is very important because it eliminates duplicate Rider entries. (The System can not individually distinguish by name alone).

Only if the search for an existing record fails, then go to Switchboard, and choose Add a New Rider.

Creating a New Rider Record

(1)   **Last Name.** You can enter lower case, the system will automatically capitalize the first letter.

(2)   **First Name.** You can enter lower case, the system will automatically capitalize the first letter.

(3)   **Phone**: you can enter the phone number using spaces: ### ### #### (and always include the area code)

Add A New Client

Client ID 38654

Last

First

Activ eClie Y

Phone

Emergency Contact

Address

COVID-19 Immunization Verified?

Zip

COVID-19 Immunization Number of

Client Notes

COVID-19 Immunization Date Of Last Injection   Date

Street

Firehouse Directions

Special Needs 1

Special Needs 2

Special Needs 3

Special Needs 4

Special Needs 5

User:
Marci Downing

MAD

SAVE THIS RECORD Go to Switchboard

- CANCEL - DO NOT SAVE THIS RECORD Go to Switchboard

(4)   **Emergency Contact**: enter the phone number of the emergency contact - using spaces: ### ### ####. Always enter the area code. Also, if possible, enter the name of the contact and/or relationship to Rider.

(5)   **Address and Zip**: enter house number, street and zip code. Do not enter city and state.

(6)   **Rider Notes**: these are <mark>notes which remain the same for each ride.</mark> Examples: "honk from driveway", "steep driveway", "daughter will follow in car", "needs assistance in walking", etc.

(7)   **Street**: enter street name and street designation in the field labeled "Street". No house number. Only use the abbreviations listed below. This is important because this is the System's key to the Drivers' "Firehouse" directions. Be careful. If this step looks like it's not working correctly, contact the System Administrator.

Street designations to be used are:

Use This	For This	Use This	For This	Use This	For This	Use This	For This
Blvd Boulevard		Ln	Lane	Pkwy	Parkway	Wy	Way
Cir	Circle	Pl	Place	Rd	Road		
Dr	Drive	Pt	Point	St	Street		

(8)   **Firehouse Directions** will be filled automatically by the System.

(9)   **Special Needs**: you have a drop down menu in each of the five fields. Use as many as needed.

(10)   Click the "SAVE THIS RECORD Go To Switchboard" button to save and to return to the Switchboard. **If you don't want to save this record**, click the **red -CANCEL-** button.

(11)   Every new Rider is sent a <u>Welcome Letter</u> which includes the BVCV service parameters. So, after adding a new Rider to the System, <u>notify (via text or email) the Scheduler Coordinator</u> so that this letter can be generated and mailed.

Extra Rider

<mark>It is not required that a CAREGIVER be a Bella Vista resident to become a Rider. But, obviously, the CAREGIVER must share the disabled Rider's address for appointment purposes.</mark>

Every Courtesy Van Rider is set up as a Rider in the BVCV System and an appointment is scheduled for every Rider, including CAREGIVERs.

(1)	Verify if the extra Rider (spouse, family member, paid service provider) is a Rider in the System.
.
(2)	If an additional Rider is not yet a Rider in the BVCV system, refer to the section on Add a New Rider and proceed to add the Rider as a new Rider.

(3)	Set up another appointment using the additional Rider as the Rider. <mark>Use **CAREGIVER** as the appointment type.</mark> Please note that there are Riders that, at times, will have regular appointments and, at other times, will be riding as a CAREGIVER.
When there is a Rider AND a CAREGIVER, this will cause two rides on the Schedule with the same appt times and destinations. That is acceptable in this circumstance AND <u>only counts as one appointment for that hour time slot</u>.
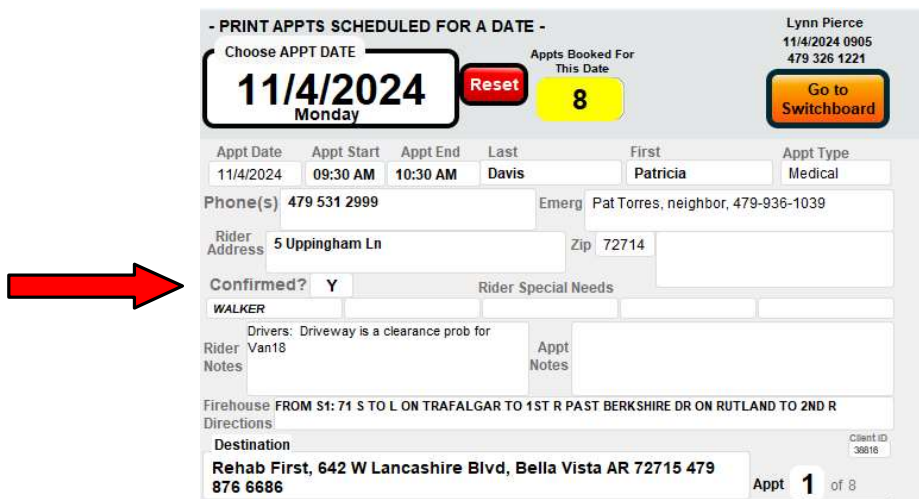
CONFIRM Appts or PRINT Daily Schedule

(1)	Always click on "Reset" to clear any information previously retrieved.

(2)	Click the "Choose APPT DATE" box in the upper left-hand corner, causing a calendar to be shown. Click on desired date.

**CONFIRM Appts
or
PRINT Daily Schedule**

(3)	Appts booked with this chosen date will load for your final review. Check details of each appointment. If you notice anything that needs to be changed, added or removed, click on "Go to Switchboard" and proceed to "Rider Info and Appts" to make adjustments. Remember to "Reset" the date when re-entering "CONFIRM Appts or PRINT Daily Schedule".

(4)   To <u>CONFIRM</u> an appt, change the "N" to "Y" on that appointment layout. This is the only field content you can change on this page. If you need to change any other information, click **Go to Switchboard**, then **Rider Info and Appointments**, then go to that Rider's appointment.

(5)   If you want to <u>PRINT the Daily Schedule</u> to your printer, contact the System Administrator to help you do this.

Appointments Booked by Date Range

(1)   This screen displays all of the appointments scheduled between 2 dates. After entering the start and end dates of the range you are interested in (and any optional choices - see #5), click on the green button "Find".

(2)   This is a good tool to identify how many rides an individual has taken in a defined period.

(3)   After the report is shown, this screen also provides certain operational statistics pertaining to the selected date range.

(4)   Click the "Go to Switchboard" button to return to the Switchboard.

(5)   Options: to include CANCELLATIONS in the report, change the "N" to "Y" in the **Include CX's** field.

(Note that the choice to include Cancellations eliminates the production of Statistics (buttons at the bottom of the screen) because Stats can only be calculated on Uncancelled rides.)

You can also choose to **Export** (with or without Cancellations) these data (in CSV format) to your computer for your own analyses.

Logging Off the System

   (1) Click "Go to Switchboard".

   (2) Click "Exit and Quit".

   (3) Open Claris and click on the profile icon in the upper right corner, click "Sign Out"

This procedure releases your sign in ID so it can be used by another Scheduler.

Revisions, Corrections & Notes

Date & Inits	Page & Location	Description of Change

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