



veyo

## Veyo RideView Training Guide

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Last Updated: December 21, 2020

# How to use Veyo RideView

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## Welcome to Veyo RideView!

This document will walk you through the main features of **Veyo's transportation management system**. If you have any questions, please visit our support center at [facilitysupport.veyo.com](https://facilitysupport.veyo.com).

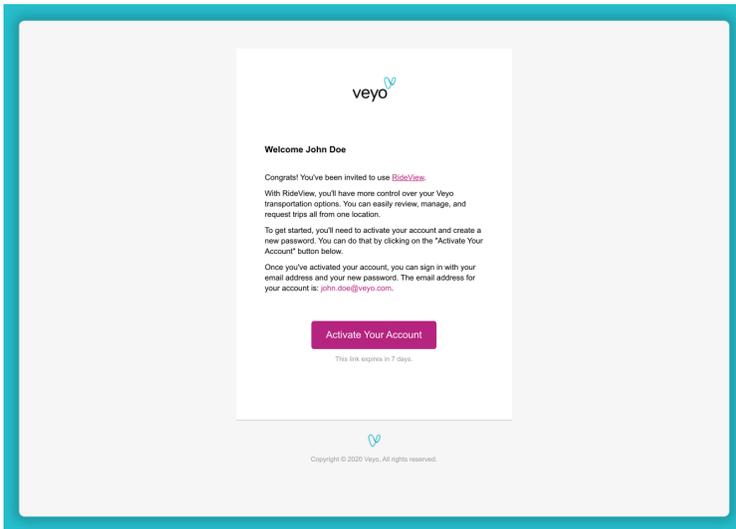
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**Please note:** We recommend that you use the Google Chrome browser for the best experience. (To learn more about Google Chrome, visit <https://www.google.com/chrome/>)

# Getting started

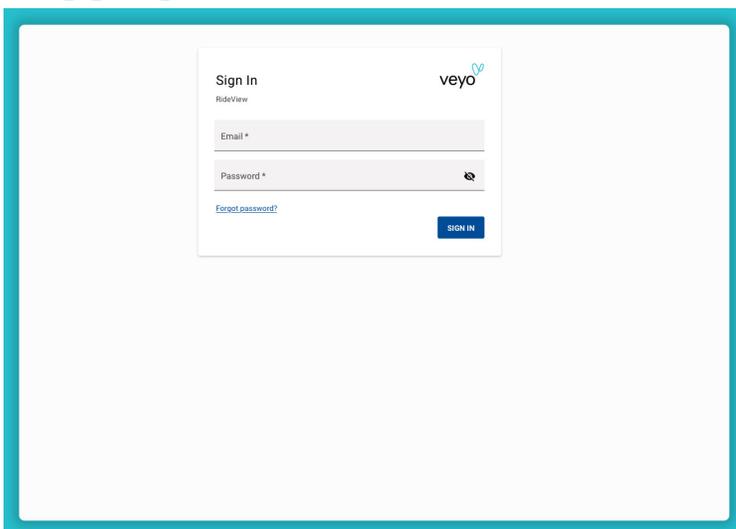
## Accessing RideView



When your supervisor has set you up to create a RideView account, you will receive an email invite with a link to “Activate Your Account.”

RideView is supported on Chrome and Firefox web browsers. If you have issues accessing RideView, you may be using an unsupported browser. If this happens, go back to your email invitation, right click the “Activate Your Account” link and select “Copy Hyperlink.” Then simply open a Chrome or Firefox browser, and paste the link into the address bar.

## Logging in to RideView



To log in to Veyo RideView, start by visiting [facility.veyo.com](https://facility.veyo.com) on your browser. If you do not have a username and password, please reach out to the administrator at your facility.

If you have forgotten your password, click the “Forgot password?” link in the bottom left corner. You can then enter your email to receive a link to reset your password.

Please Note: We recommend that you use the Google Chrome browser for the best experience.

## Viewing your trips

The screenshot shows the 'Viewing Trips' page in RideView. At the top, there are navigation tabs for 'Your Accounts', 'Your Facilities', and 'Your Passengers'. Below these are filter sections for 'Facility' (California Facility), 'Account' (ACH), and 'Status' (14 statuses selected). A 'REQUEST TRIP' button is also present. The main area contains a table of trips with columns for Date, Time, Name, MID, DOB, and CONF #. A 'FEWER OPTIONS' link and 'SEARCH'/'RESET' buttons are also visible.

Date	Time	Name	MID	DOB	CONF #
Apr 20	10:30 AM	Carolina Blackwood	MID: 1	DOB: 02/15/1952	CONF #: 12345678
Apr 20	10:30 AM	Stanford Virge	MID: 1	DOB: 08/20/1967	CONF #: 30592020
Apr 20	12:30 PM	Hayden Normanson	MID: 50930928	DOB: 04/19/1975	CONF #: 50908890
Apr 20	1:00 PM	Jason Blackwood	MID: 04920298	DOB: 09/10/1984	CONF #: 98958030
Apr 20	1:15 PM	John Smith	MID: 47390296	DOB: 10/11/1987	CONF #: 08508900
Apr 20	2:00 PM	Lloyd Miles	MID: 40828009	DOB: 03/24/1978	CONF #: 50803900
Apr 21	9:00 AM	Charley Milford	MID: 24080802	DOB: 10/14/1977	CONF #: 84003029
Apr 21	11:00 AM	James Karaluk	MID: 5852900	DOB: 11/12/1985	CONF #: 4059020
Apr 21	11:30 AM	Nelson Schwartz	MID: 20948820	DOB: 02/19/1974	CONF #: 40903909
Apr 21	12:30 PM	Joyce Maloney	MID: 69302903	DOB: 03/16/1969	CONF #: 99830200

The first thing you will see when viewing your trips is the 'Trip List'. This shows a list of scheduled trips in ascending order. You can always view this list by clicking "Trip List" at the top of your screen. If you have access to multiple facilities, you will see trips to and from all of those facilities here.

To refine the list of trips you see, use the filters on the top of the screen.

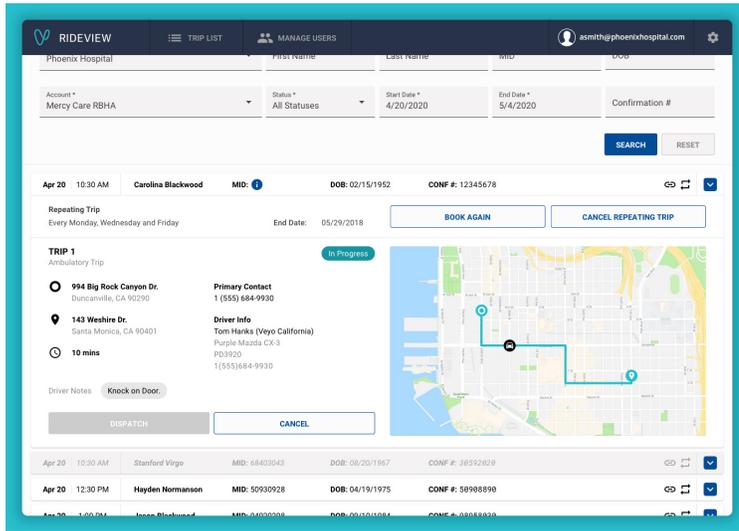
- Facility (required)
- Account (required)
- Status
- MID
- Name
- DOB
- Booking Reference Number
- Appointment Date Range (by default, RideView will show you trips occurring in the next 14 days)

Each trip is listed with the date, time, member name, MID, DOB, and booking reference number.

To view more information about the trip, click on the

This is a close-up of a single trip entry from the table above. It shows the date and time (Apr 20 12:30 PM), the member's name (Hayden Normanson), their MID (50930928), DOB (04/19/1975), and CONF # (50908890). There are also icons for external links and a dropdown menu.

## Viewing information on a specific trip



Once a trip card has been expanded, you will be able to see:

- Real-time trip status
- Member information
- Driver contact information
- Vehicle information
- Pickup/drop-off addresses
- Driver Notes
- Real-time map (Map data will appear if the driver is using Veyo's Driver App)

## Booking new trips

When you're ready to book a trip for a passenger, please have the following information ready:

- The account name the trip should be booked under
- Passenger details: First and last name, MID or DOB, contact number, additional passenger details (if necessary)
- The appointment location, time, and date
- Name of the facility booking the trip
- Address for the pickup and drop-off location
- The repeating details of the trip (if the trip occurs more than once)
- Trip details including trip reason and mode
- Any special requests/needs for the trip (e.g. service animal, oxygen, extra assistance)
- Full driver notes (no abbreviations)



To book a trip, click on the pink "Request Trip" button on the top-right corner of your screen.

## Searching for a passenger

The first step required to book a trip through RideView is to verify the passenger that you are trying to book for.

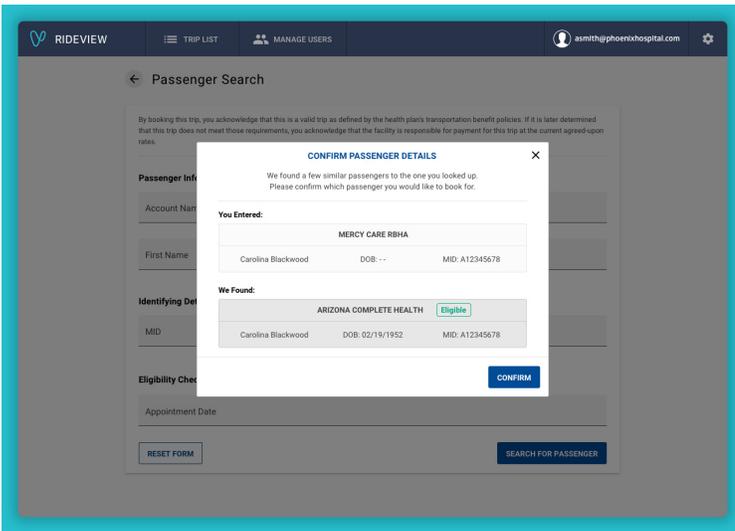
On the Passenger Search page, enter in the following information for the member:

- Account name
- First and last name
- MID or DOB (date of birth)
- The appointment date (to check for eligibility)

### Passenger Eligibility

If a passenger is located under another plan - or multiple plans - you will need to confirm which plan you are booking the trip for.

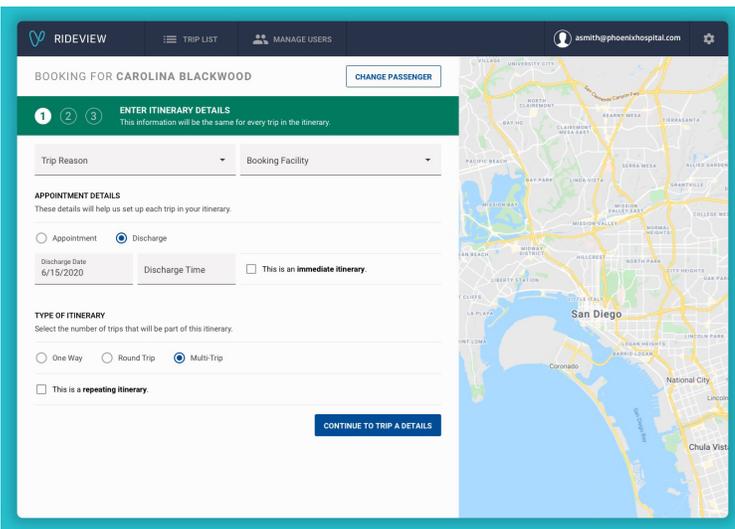
On the Confirm Passenger Details pop-up, you will see all of the plans that the passenger is eligible to book trips under.



Select the plan by clicking on the box that lists the correct information and plan name for that passenger. If the passenger is located under several plans, please select the appropriate plan.

Once you have selected the correct plan, click Confirm.

## Booking a round trip

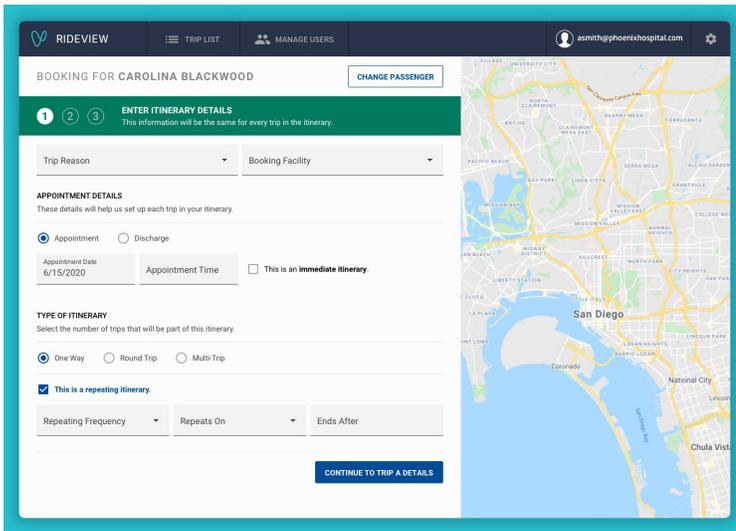


### Appointment Details

If the member is eligible to book a trip, the Itinerary Details page will appear.

Enter in:

- Trip Reason
- Booking Facility
- If the Itinerary is for an Appointment or a Discharge
- Appointment Date
- Appointment Time
- Immediate itinerary (if applicable)
- Type of Itinerary - Round Trip

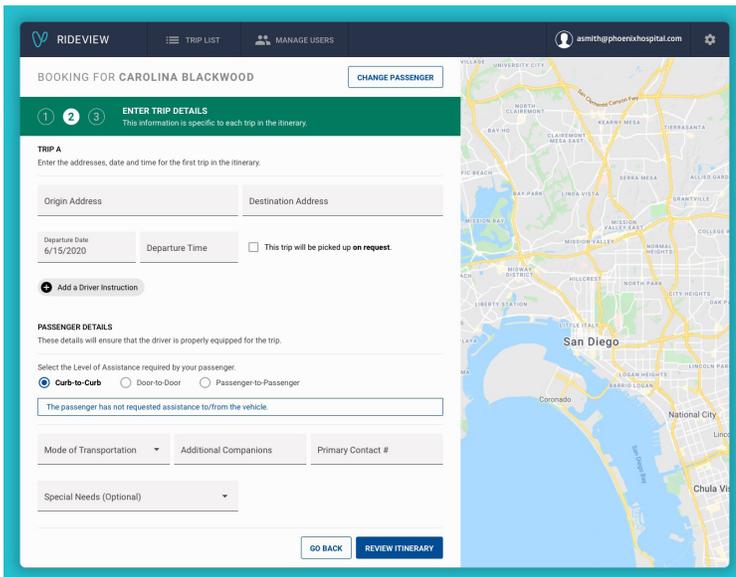


### Repeating Details

If this is a one-time booking, click “Continue to Trip A Details” to move onto the next screen.

If the trip will repeat, please review the ‘[Booking a repeating trip](#)’ section of this guide.

Click “Continue to Trip A Details” to move onto the next screen.

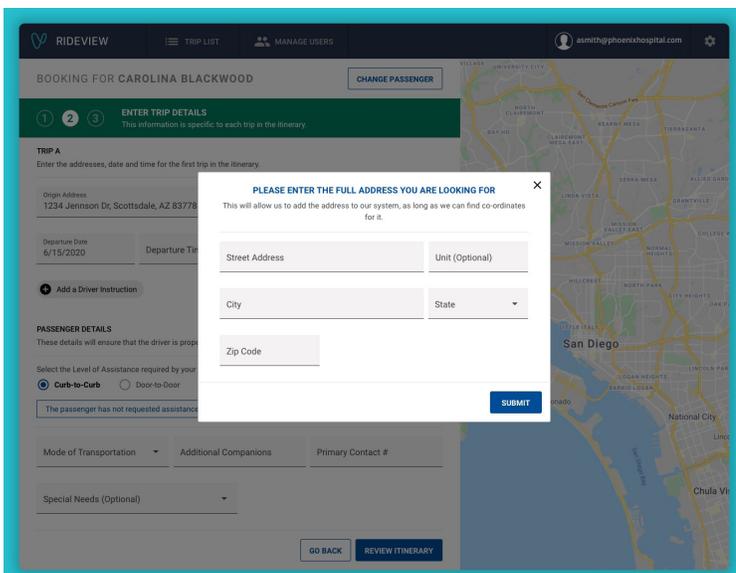


### Trip A Details

Now enter the:

- Origin address
- Destination address
- Departure Time

As you type in the address, it will autocomplete using Google Maps. Once you have entered the address, the map will update to show the address location and the departure time will be calculated.



### Can't Find an Address?

If the address isn't appearing when you type it in, click on “Click here to add it manually” and enter the:

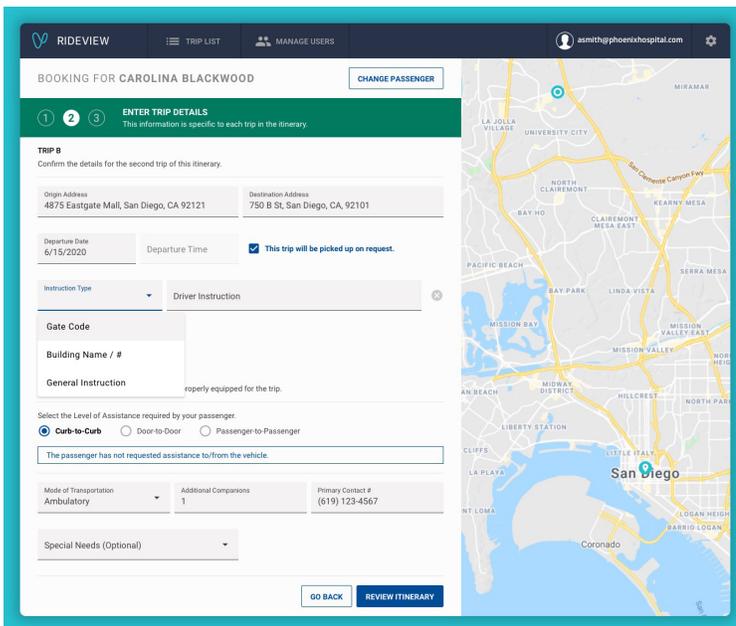
- Street Address
- Unit (Optional)
- City
- State
- Zip Code

Click ‘Submit’ to verify the address, and move onto the Destination Address.

### Add Driver's Notes

If specific instructions are needed to be shared with the Driver, click "Add a Driver Instruction"

Select the "Instruction Type" and enter text into the Driver Instructions field. The text will automatically be saved once you click out of the field.

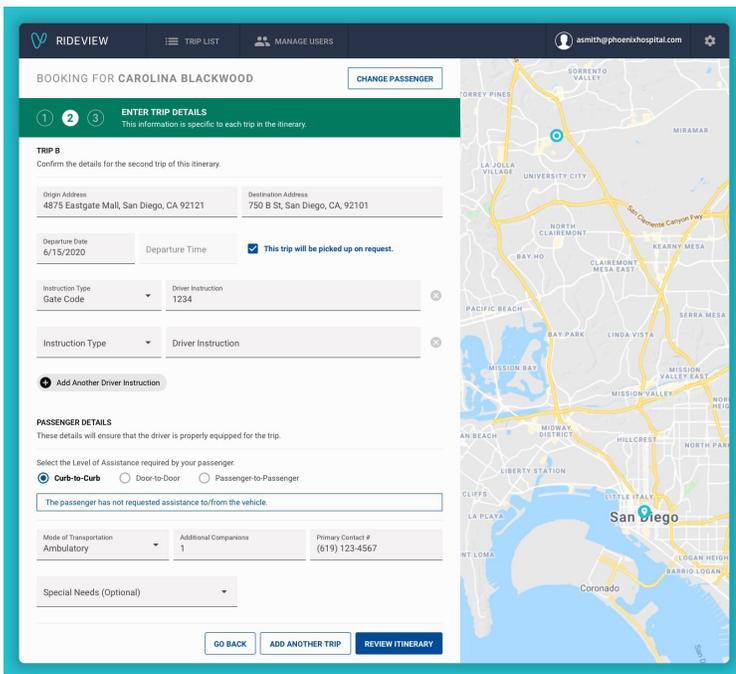


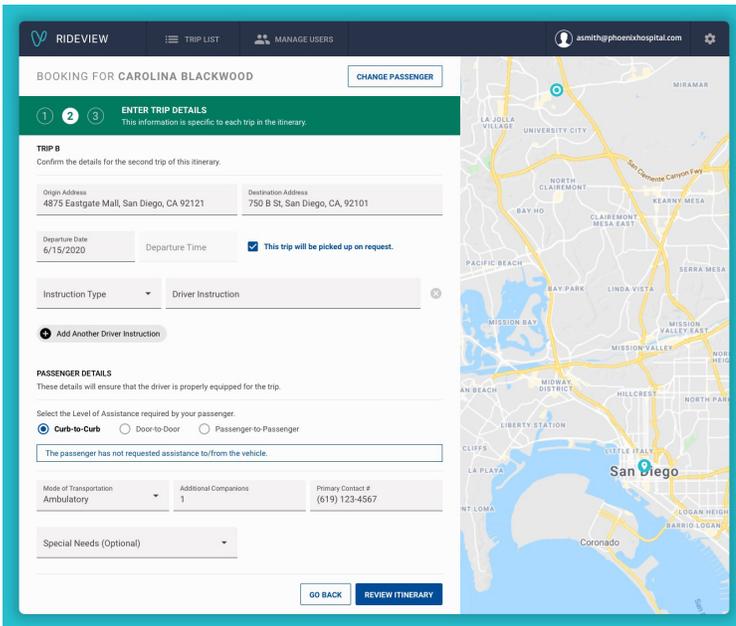
### Passenger Details

Enter in the:

- Level of Assistance
- Mode of Transportation
- Additional passengers (if applicable)
- Primary contact phone number for the member
- Specific needs (e.g. oxygen, service animal, walker)

Click 'Add Another Trip' to move onto the next screen, or click 'Go Back' to move back to the previous screen.





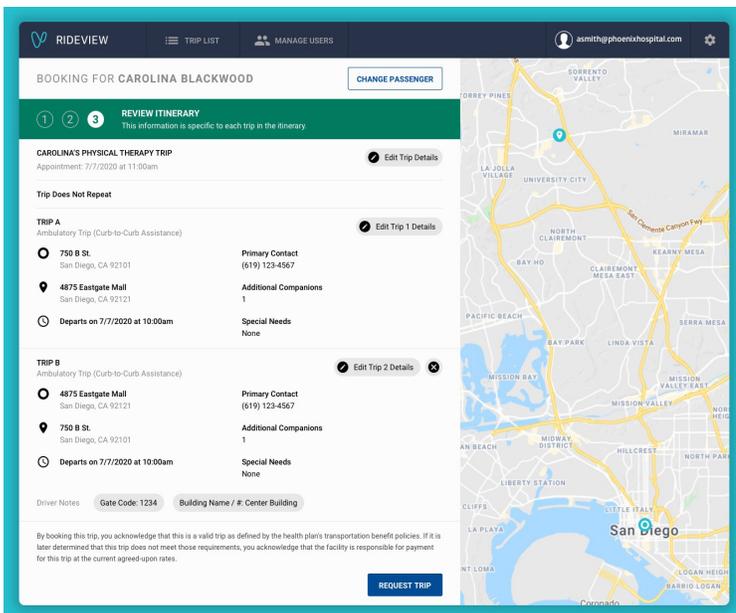
### Trip B Details

Confirm prepopulated Trip Details for the additional Trip.

Enter in:

- Departure Time
- Driver's Notes

Click 'Review Itinerary' to move onto the next screen, or click 'Go Back' to move back to the previous screen.



### Trip Review

Verify that the member and trip details are correct. Then click 'Request Trip' to book the trip.

To edit Itinerary Details or Trip Details click the Edit button next to the section needing updates. You will be taken to the appropriate page to make updates.

A booking reference number will be shown on the next page if the trip is booked successfully.

## Booking a repeating trip

### Repeating Trips

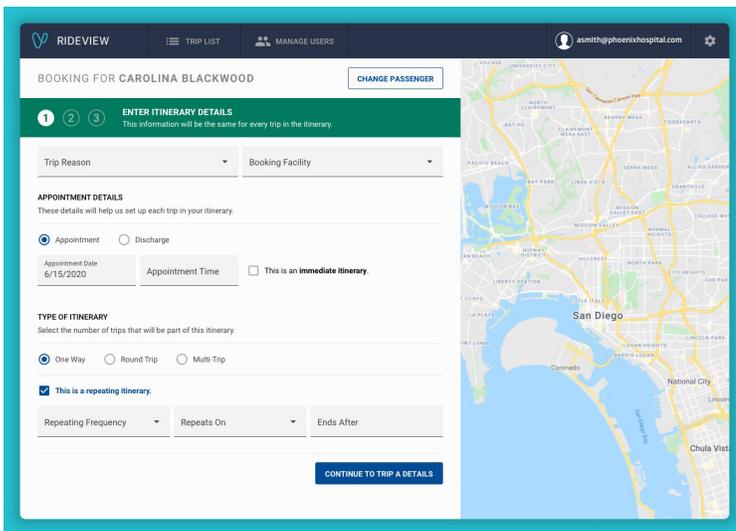
If the trip will be repeated more than once (e.g. a trip that occurs every Tuesday at 10am), you can set up a repeating Itinerary.

### Appointment Details

If the member is eligible to book a trip, the Itinerary Details page will appear.

Enter in:

- Trip Reason
- Booking Facility
- If the Itinerary is for an Appointment or a Discharge
- Appointment Date
- Appointment Time
- Type of Itinerary (One Way, Round Trip, or Multi Trip)

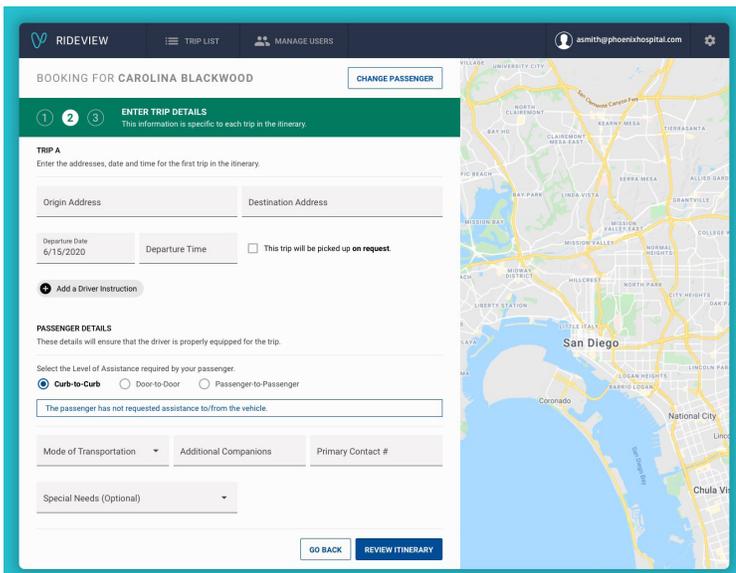


### Repeating Details

Now check the “Repeating Itinerary” check box and enter:

- The repeating frequency
- The day the trip repeats on
- The end date

Click ‘Continue to Trip A’ to move onto the next screen.

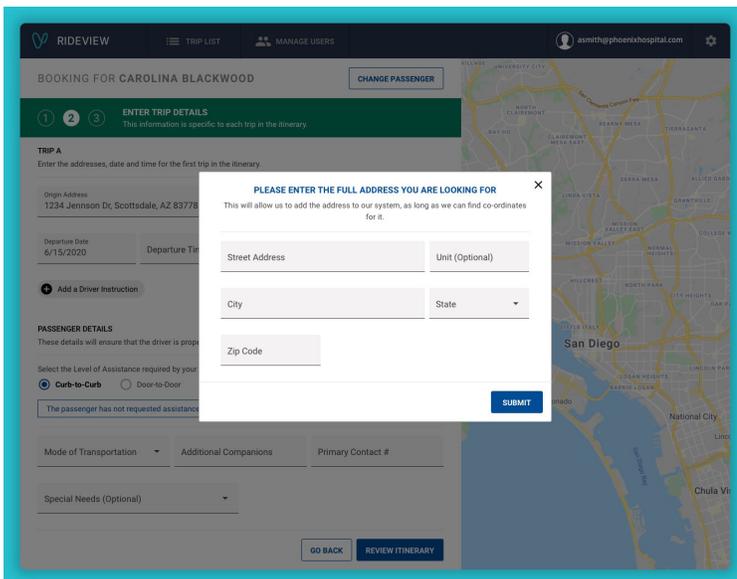


### Trip A Details

Now enter the:

- Origin address
- Destination address
- Departure Time

As you type in the address, it will autocomplete using Google Maps. Once you have entered the address, the map will update to show the address location and the departure time will be calculated.

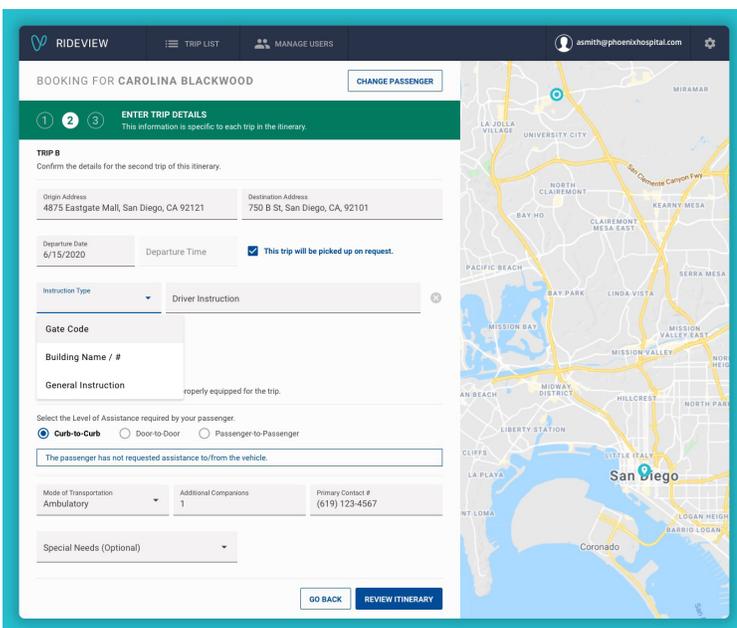


### Can't Find an Address?

If the address isn't appearing when you type it in, click on "Click here to add it manually" and enter the:

- Street Address
- Unit (Optional)
- City
- State
- Zip Code

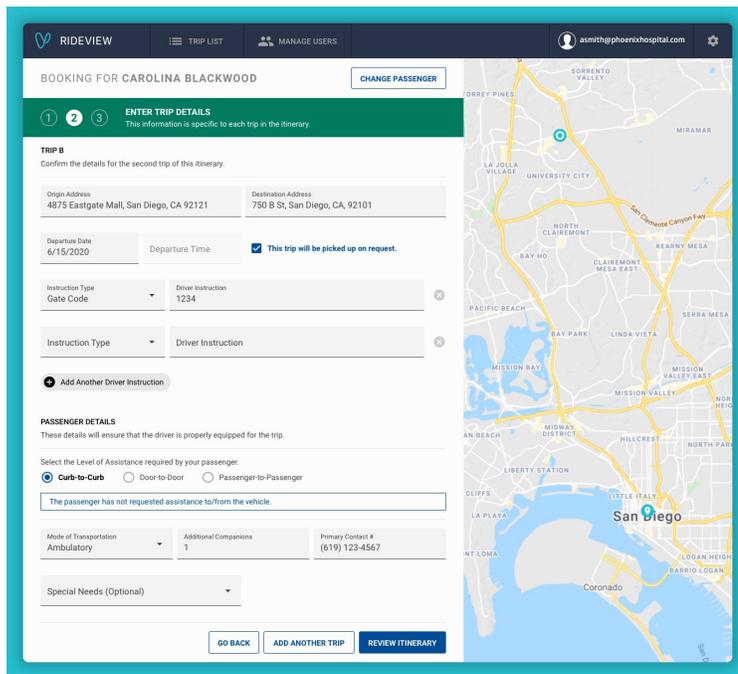
Click 'Submit' to verify the address, and move onto the Destination Address.



### Add Driver's Notes

If specific instructions are needed to be shared with the Driver, click "Add a Driver Instruction"

Select "Instruction Type" and enter text into the Driver Instructions field. The text will automatically be saved once you click out of the field.

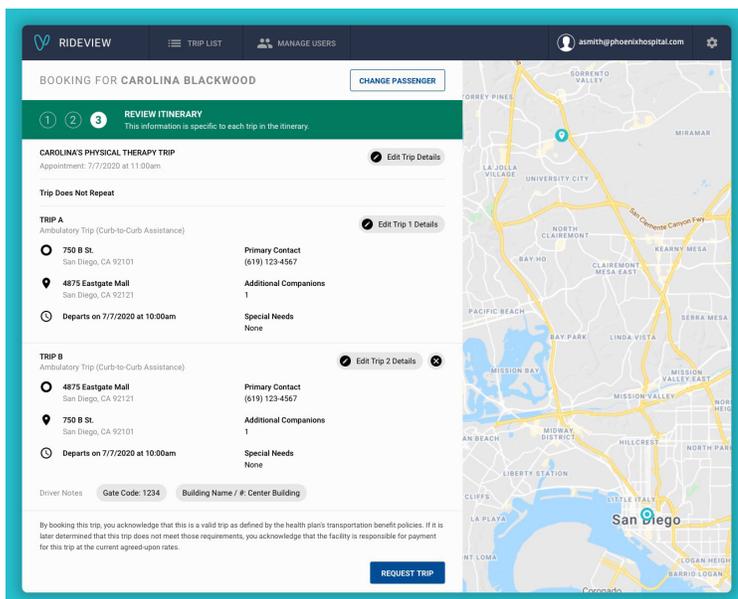


### Passenger Details

Enter in the:

- Level of Assistance
- Mode of Transportation
- Additional passengers (if applicable)
- Primary contact phone number for the member
- Specific needs (e.g. oxygen, service animal, walker)

Click 'Go Back' to move back to the previous screen. Click "Add Another Trip" if another Trip is needed or "Review Itinerary" if all Trips have been added.

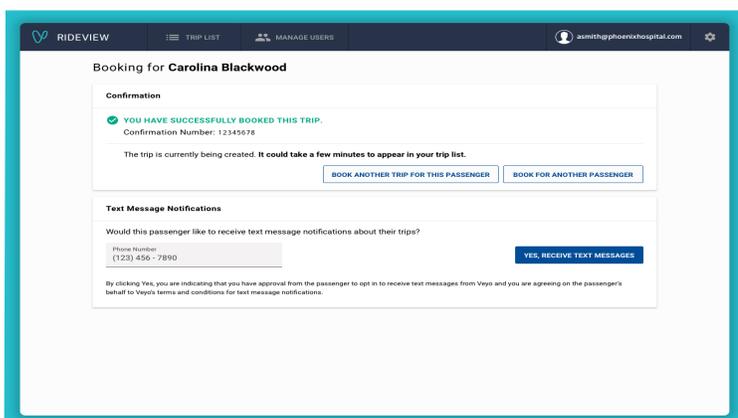


### Trip Review

Verify that the member and trip details are correct. Then click 'Request Trip' to book the trip.

To edit Itinerary Details or Trip Details click the Edit button next to the section needing updates.

A booking reference number will be shown on the next page if the trip is booked successfully.



The booking reference number will be shown if the trip is booked successfully.

If the passenger has not already opted into text message notifications about their trips, you will have the opportunity to do so on their behalf. Enter a valid phone number and click "Yes, Receive Text Messages".

## Booking a single immediate trip

### Appointment Details

If the member is eligible to book a trip, the Itinerary Details page will appear.

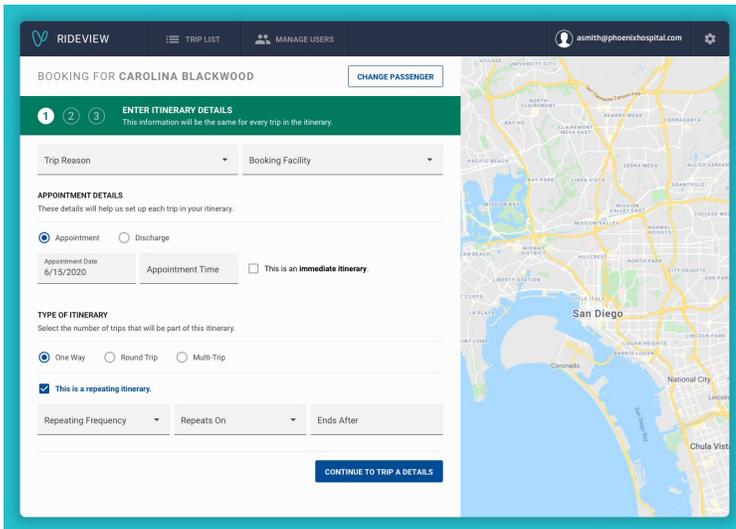
Enter in:

- Trip Reason
- Booking Facility
- If the Itinerary is for an Appointment or a Discharge
- Appointment Date & Time
- Appointment Time
- Type of Itinerary - One Way

### Immediate Itinerary

**To set the trip for immediate pick up, check the box next to “This is an immediate itinerary”.**

Appointment time will still be required. You can use an appointment time of the current time or a future time.

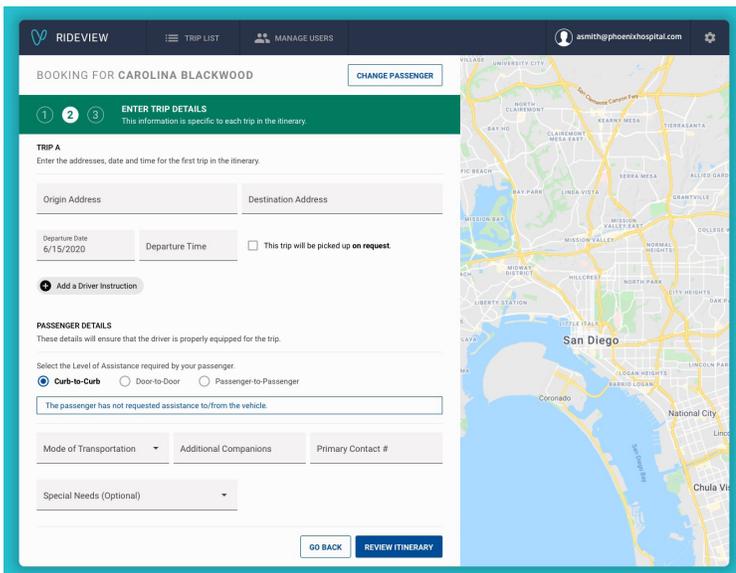


### Repeating Details

If this is a one-time booking, click “Continue to Trip A Details” to move onto the next screen.

If the trip will repeat, please move onto the next section of this guide, **‘Booking a repeating trip’**.

Click “Continue to Trip A Details” to move onto the next screen.

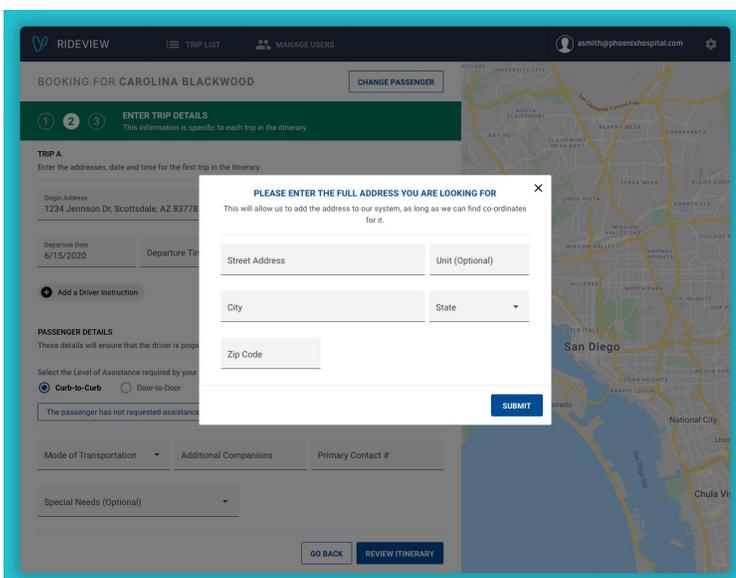


### Trip A Details

Now enter the:

- Origin address
- Destination address
- Departure Time

As you type in the address, it will autocomplete using Google Maps. Once you have entered the address, the map will update to show the address location and the departure time will be calculated.



### Can't Find an Address?

If the address isn't appearing when you type it in, click on “Click here to add it manually” and enter the:

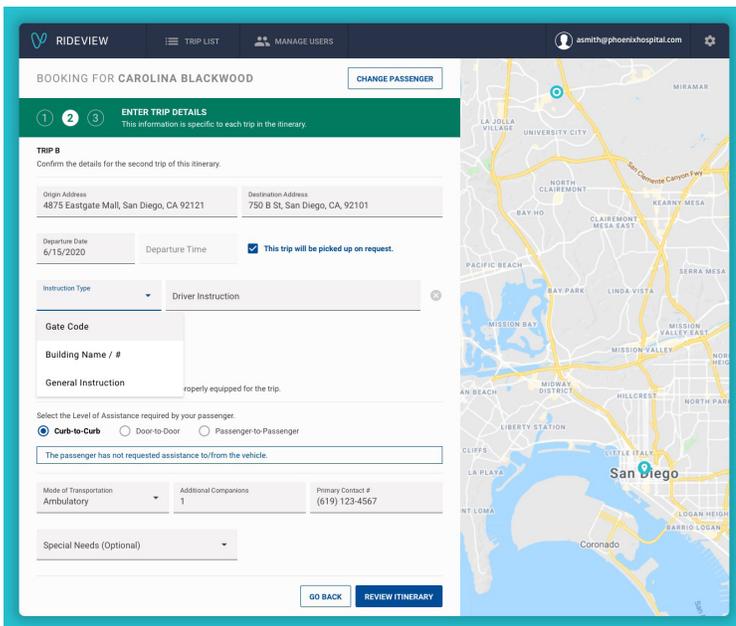
- Street Address
- Unit (Optional)
- City
- State
- Zip Code

Click ‘Submit’ to verify the address, and move onto the Destination Address.

### Add Driver's Notes

If specific instructions are needed to be shared with the Driver, click "Add a Driver Instruction"

Select "Instruction Type" and enter text into the Driver Instructions field. The text will automatically be saved once you click out of the field.

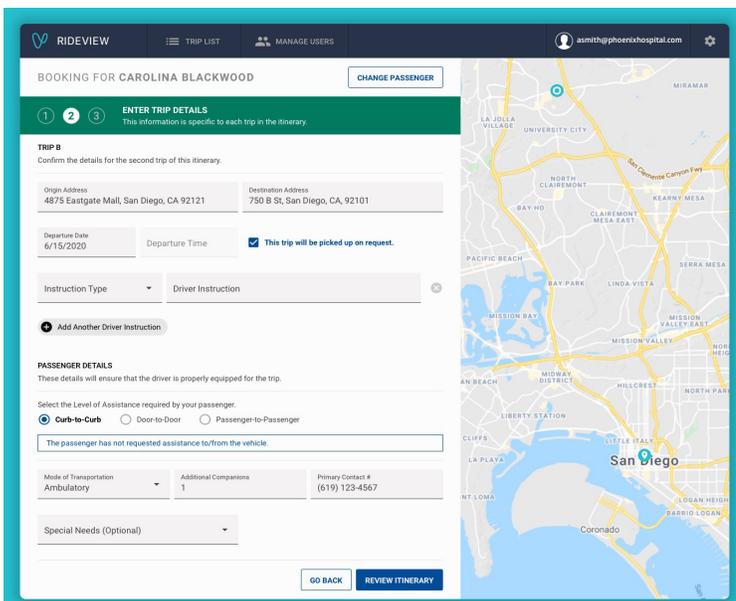


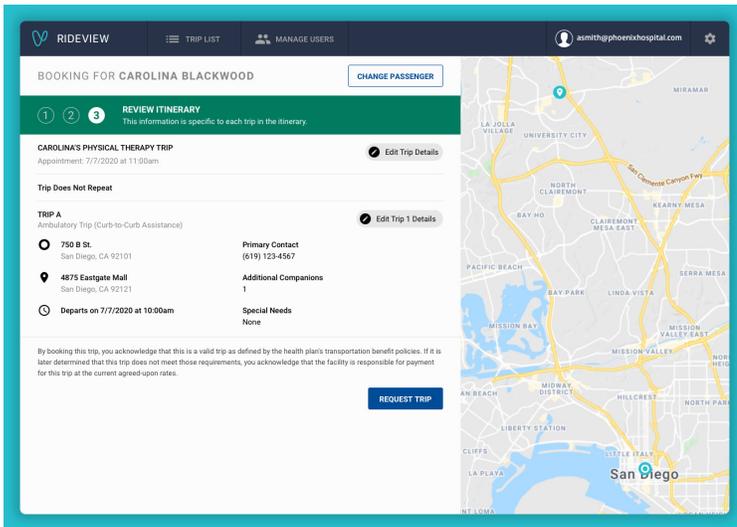
### Passenger Details

Enter in the:

- Level of Assistance
- Mode of Transportation
- Additional passengers (if applicable)
- Primary contact phone number for the member
- Specific needs (e.g. oxygen, service animal, walker)

Click "Review" to move onto the next screen, or click "Go Back" to move back to the previous screen.





### Trip Review

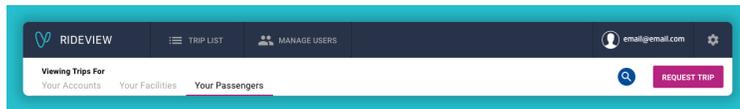
Verify that the member and trip details are correct. Then click 'Request Trip' to book the trip.

To edit Itinerary Details or Trip Details click the Edit button next to the section needing updates.

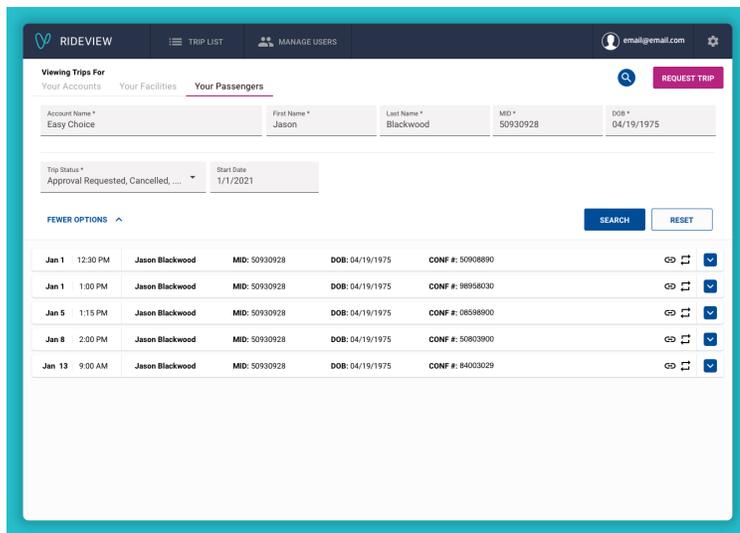
A booking reference number will be shown on the next page if the trip is booked successfully.

# Managing your trips

## View all trips for a member



Users with the Case Manger profile are able to view a list of all scheduled trips for a specific member by clicking 'My Passenger's' trips tab on the top of your screen.



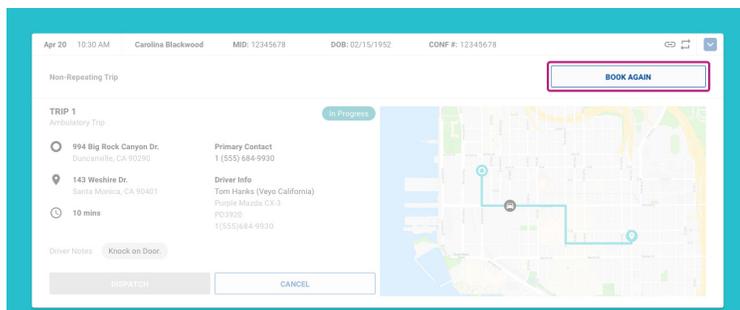
Use the filters on the left side to enter in the member's:

- Account name
- MID
- First and Last Name
- DOB

A list of all of the scheduled trips for that member will appear.

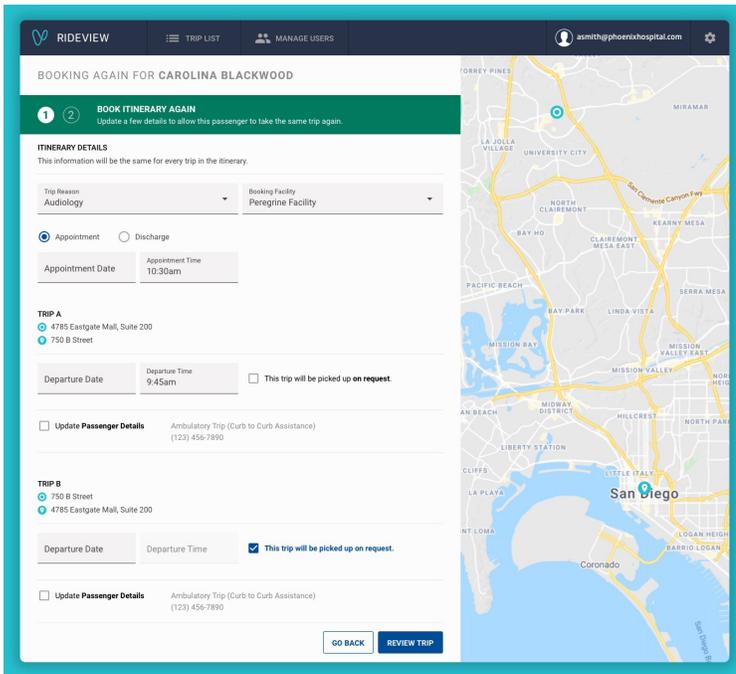
To view all of the member's trips at your facility, click 'View all trips at your facility' in the top-right corner of your screen.

## Rebook the same trip for a member



Expand the trip card for the trip you'd like to rebook by clicking the blue arrow to the right of the trip. On the expanded trip card, you will see a 'Book Again' button under each trip.

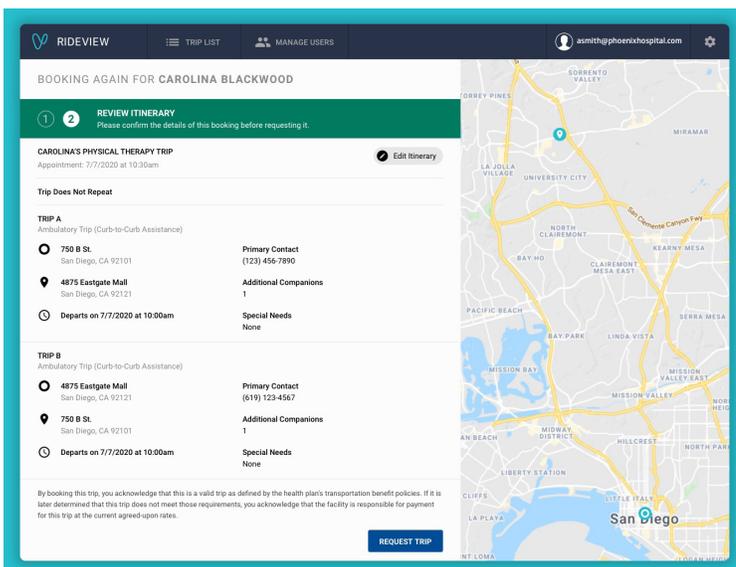
Click 'Book Again' to book another trip with the same trip information (member information, origin address, destination address).



Enter the new appointment details for the trip. This includes the appointment date, appointment time, and booking facility.

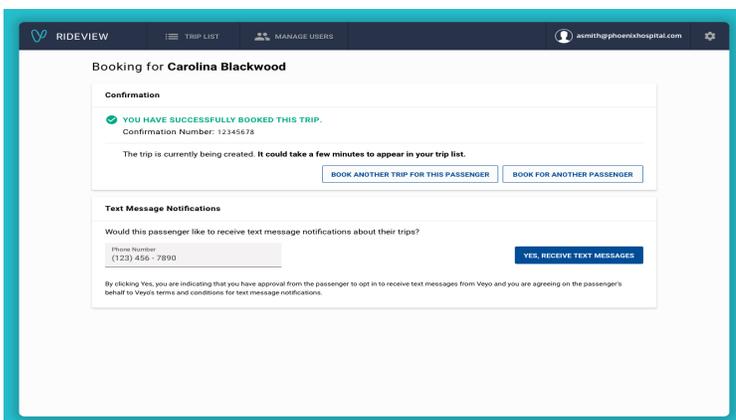
Next enter the dates and times for the trips in the itinerary.

Click "Review Trip" to proceed to the next screen.



Review the trip details. If Edits are needed, click "Edit Itinerary" to go back.

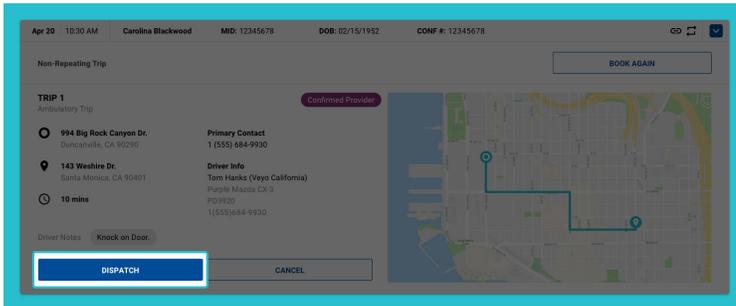
Click 'Request Trip' to book the trip.



The booking reference number will be shown if the trip is booked successfully.

If the passenger has not already opted into text message notifications about their trips, you will have the opportunity to do so on their behalf. Enter a valid phone number and click "Yes, Receive Text Messages".

## Request a driver for immediate pickup

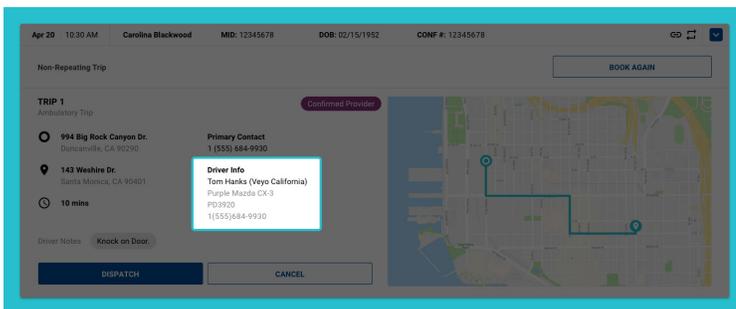


If you have set the pick up time as “On Request” during the booking process, the Driver will need to be dispatched to complete the Trip.

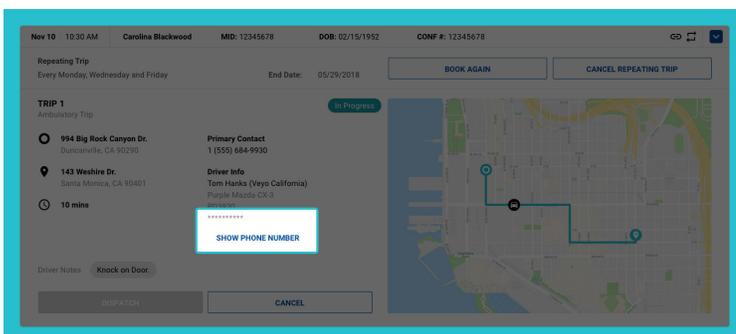
To do so, expand the trip card for the trip you'd like to dispatch by clicking the blue arrow to the right of the trip. On the expanded trip card, you will see a 'Dispatch' button under each trip. Click 'Dispatch' under the trip you'd like to dispatch.

A pop-up screen will ask you to review the request. If the details look correct, click 'Dispatch Trip' to request an immediate pickup.

## Contact the driver of a trip

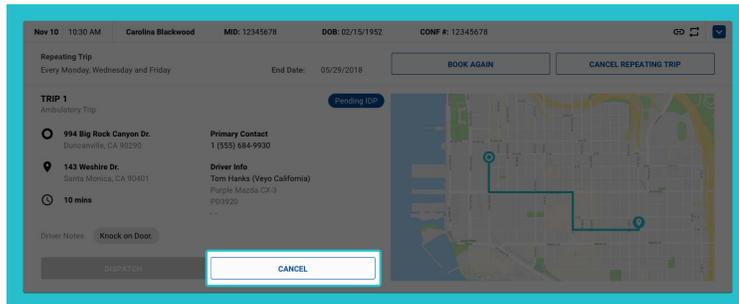


If you'd like to contact the driver of a trip, you can reach them by calling the phone number listed in the trip card.



If the trip is being fulfilled by a Veyo rideshare driver, the system will generate a temporary phone number and pin that can be used to contact the driver. Once you call the phone number, you will be asked to enter the pin. The call will then connect to the driver. This temporary phone number will only be available during the duration of the trip.

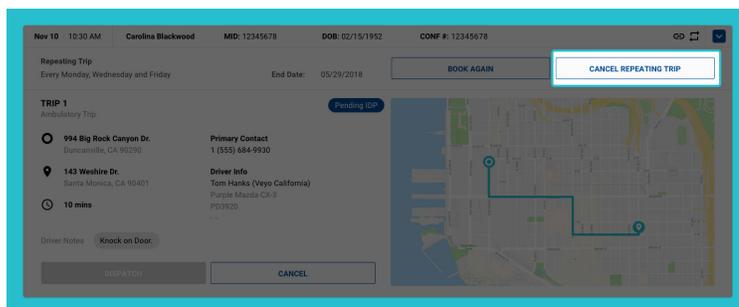
## Cancel a single or repeating trip



### Cancel a single trip

Expand the trip card of the trip you'd like to cancel by clicking the blue arrow to the right of the trip. On the expanded trip card, you will see a 'Cancel' button under each trip. Click on 'Cancel' under the trip you'd like to cancel.

A pop-up screen will ask you to review the cancellation. If you'd still like to cancel the trip, click 'Cancel Trip'



### Cancel a repeating trip

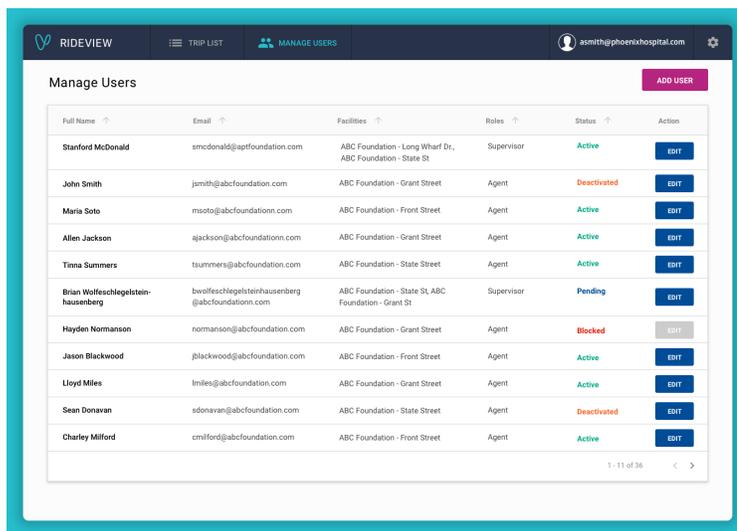
Expand the trip card of the repeating trip you'd like to cancel by clicking the blue arrow to the right of the trip. On the expanded trip card, click on 'Cancel Repeating Trip' in the top-right corner of the trip card.

A pop-up will ask you to review the cancellation. If you'd still like to cancel the trip, click 'Cancel Repeating Trip'

# Managing your users

## User management

If you have administrator access, you can add and remove users to your RideView account. You can also edit a user's access to include additional facilities or user roles if you manage multiple facilities or passengers travelling to other locations.



Click on 'Manage Users' at the top of your screen to view a list of all the users associated with your account.

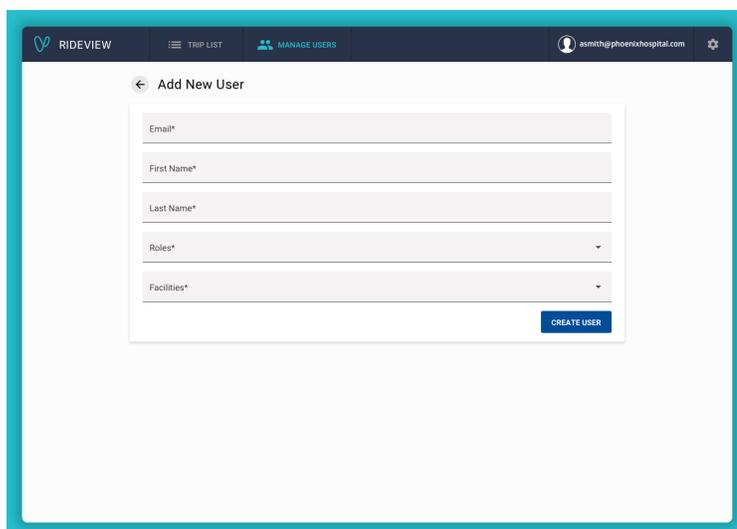
You can see their:

- Full name
- Email
- List of facilities they can book trips for
- User role (Facility Supervisor, Facility Agent, Case Manager)
- Status (Active, Pending, Deactivated)

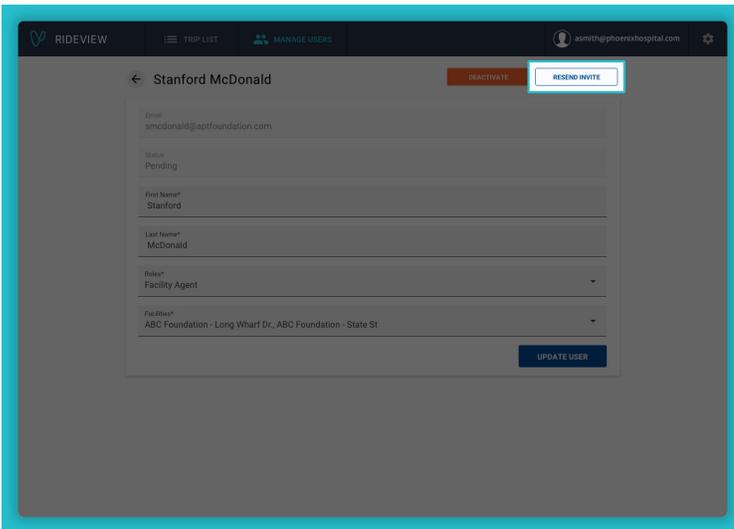


### Add a user

To add a user, click on 'Add User' in the top right of your screen. Enter in their contact information, determine whether their role should be a supervisor or agent, and select which facilities they can manage.

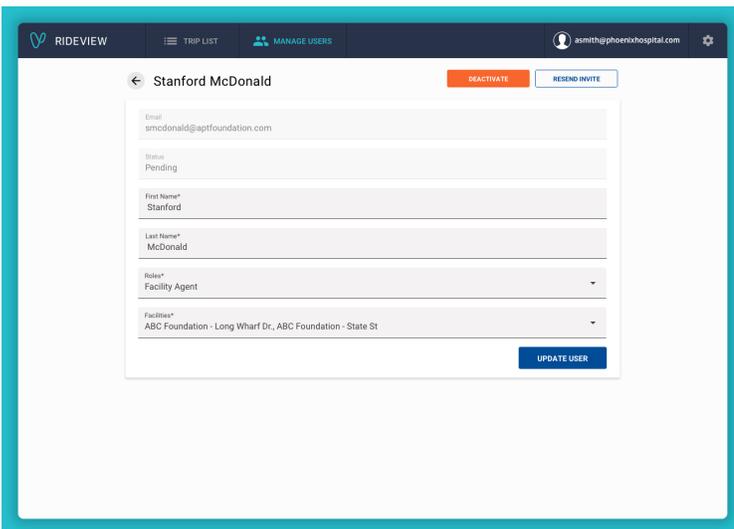


Once you click 'Create User' an email will be sent to the user with login instructions.



### Resend a user's invite

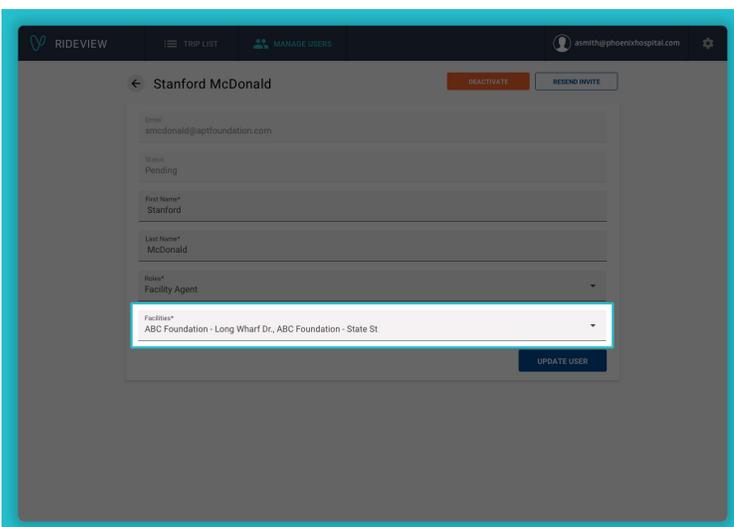
Click the 'Edit' button to the right of the user's name on the user list. Then select 'Resend Invite' at the top of your screen.



### Edit a user

Click the 'Edit' button to the right of the user's name on the user list. Make the changes to their account and then click 'Update User'.

Please Note: at this time you can't update a user's email address. You will need to deactivate their old account and create a new account for them if their email has changed.

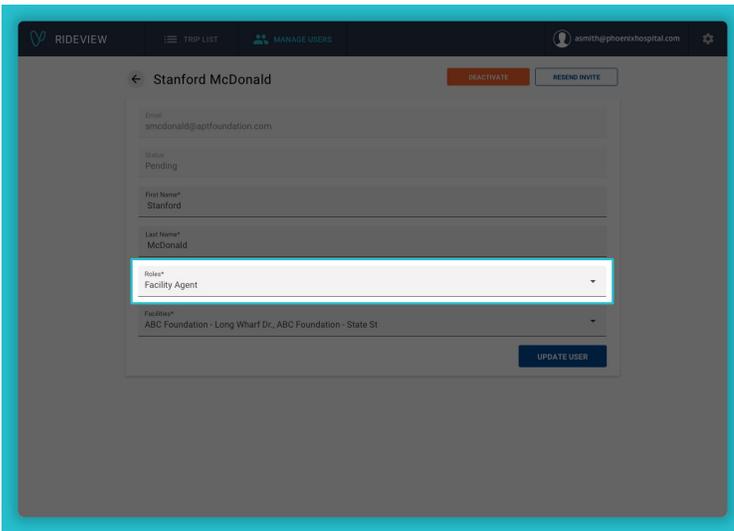


### Add facilities to a user's account

Click the 'Edit' button to the right of the user's name on the user list. Then click on facilities. Place a check box next to the facilities you'd like the user to be able to access.

### Add user roles to a user's account

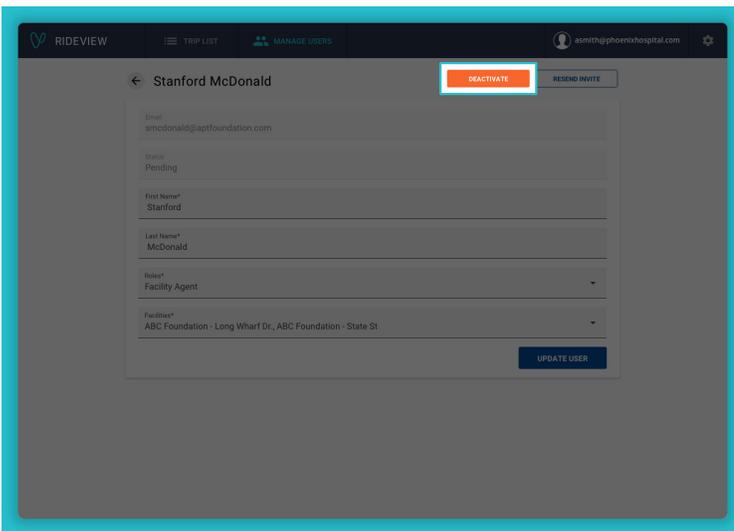
Click the 'Edit' button to the right of the user's name on the user list. Then click on user roles. Place a check box next to the user roles you'd like the user to have.



### Deactivate/remove a user

Click the 'Edit' button to the right of the user's name on the user list. Then select 'Deactivate' at the top of your screen.

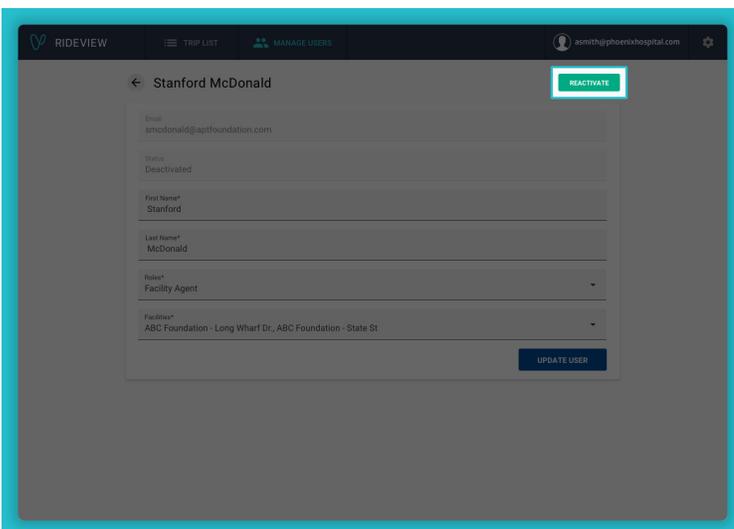
A pop-up screen will ask you to confirm the deactivation. Click 'Confirm Deactivation' to remove the user's access.



### Reactivate a user

Click the 'Edit' button to the right of the user's name on the user list. Then select 'Activate' at the top of your screen.

A pop-up screen will ask you to confirm the reactivation. Click 'Confirm Reactivation' to restore the user's access.



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# Frequently asked questions (FAQ)

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A few FAQs are included below. For more information, please visit [facilitysupport.veyo.com](https://facilitysupport.veyo.com).

## **I've lost my password. How do I reset my password?**

If you've lost your password, please click on the 'Forgot Password' button on your login screen. Then just enter the email address connected to your account. In a few minutes you'll receive an email that will help you reset your password.

## **Why can't I book a trip that's more than 30 days out?**

While it is always recommended that you book a trip at least two to three business days in advance, each health plan may have a different restrictions on how far out you can book a trip. For example, while some health plans allow scheduling up to 180 days in advance, others only allow scheduling up to 30 days in advance. RideView won't let you book a trip past the applicable booking window or eligibility on file.

## **What if my passenger needs an item that isn't on the Specific Needs list?**

If you need to add a note to the trip that isn't included in the special equipment list, you can add additional instructions in the final step of trip booking. These instructions will be seen by the driver when they are assigned the trip.

## **Why can't RideView find my pickup/drop-off location?**

RideView must verify the geolocation of every address before it can add that address to a trip. If you cannot find the correct address, please reach out to the appropriate contact center for further assistance.

## **Why isn't RideView letting me book a trip for a specific passenger?**

In order to book a trip for a passenger, they must be included in our eligibility files. If you believe the passenger should be in our eligibility files, please contact the appropriate contact center for further assistance.

## **Why can't I see the "View My Passenger's Trips" button?**

The "View My Passenger's Trips" button is only visible to users with the Case Manager profile. If you serve as a Case Manager and need access to view a passenger's trip, please reach out to your administrator to adjust your profile.