



# Scheduler's Handbook

*Edition of June 2023*

**CONFIDENTIAL**

DO NOT SHARE

This document contains personal information which should be protected

# Contents

# Page

<b>Bella Vista Courtesy Van Info.....</b>	<b>3</b>
<b>Drivers' Team and System Contacts.....</b>	<b>3</b>
<b>Courtesy Van Board Members.....</b>	<b>3</b>
<b>BVCV Scheduler and Publisher Roster.....</b>	<b>4</b>
<b>Scheduler Cell Phone Guidelines.....</b>	<b>5</b>
<b>Accessing Voice Mail.....</b>	<b>6</b>
BVCV Office Phone Voice Mail.....	6
Scheduler's Cell Phone Voice Mail.....	6
<b>General Scheduling Guidelines.....</b>	<b>7</b>
<b>How &amp; When to Say No, or Ask a Client to Make Changes.....</b>	<b>8</b>
<b>Weather Closings.....</b>	<b>8</b>
<b>The Courtesy Van Service Area.....</b>	<b>9</b>
<b>Overview of Workflow.....</b>	<b>10</b>
<b>The BVCV System - Filemaker Pro (Claris) Assigned IDs and PWs.....</b>	<b>12</b>
<b>BVCV System Screens and Functions.....</b>	<b>12</b>
Accessing the BVCV System (Claris).....	12
The SWITCHBOARD.....	14
Clients and Appointments.....	15
Searching for A Client.....	15
Client Demographics and Basic Information.....	15
Enter or Change an Appointment.....	16
Canceling An Appointment.....	17
Add a New Client.....	17
Criteria for New Clients.....	17
Creating a New Client Record.....	17
Extra Rider.....	19
CONFIRM Appts or PRINT Daily Schedule.....	19
Scheduler's Worksheet.....	21
Appointments Booked by Date Range.....	21
Logging Off the System.....	22
<b>Revisions and Corrections.....</b>	<b>23</b>
<b>Notes.....</b>	<b>24</b>



# BVCV Scheduler and Publisher Roster

Team Member	Inits	Address	Zip	Phone	Email
William Barhydt	WJB	62 Bickenshire Dr	72714	214 732 3469	<a href="mailto:wbarhydt@gmail.com">wbarhydt@gmail.com</a>
Judy Carter	JEC	13 Newham Ln	72714	501 472 4214	<a href="mailto:jayelaine@yahoo.com">jayelaine@yahoo.com</a>
Roberta (Bert) Dale	RGD	19 Parkridge Dr	72715	479 418 6698	<a href="mailto:gregrobertadale@cox.net">gregrobertadale@cox.net</a>
Nan DeLany (Email Manager)	NKD	20 Salisbury Dr	72714	479 268 3264 H 479 282 5173 C	<a href="mailto:nandelany@gmail.com">nandelany@gmail.com</a>
Jane Jansen (Dialysis Coord)	JEJ	17 Marykirk Ln	72715	712 395 0700	<a href="mailto:janeandlu@gmail.com">janeandlu@gmail.com</a>
Pat Johnson	PAJ	12 Newham Ln	72714	605 949 2941	<a href="mailto:patldj@hotmail.com">patldj@hotmail.com</a>
Stephanie Kappel	SLK	16 Mason Ln	72715	918 521 9673	<a href="mailto:slkappel@prodigy.net">slkappel@prodigy.net</a>
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Lynn Pierce (Coord'r of Calendars for Sched'rs & Publis'rs)	DLP	62 Magrath Dr	72715	337 489 0880	<a href="mailto:lpierce.479@gmail.com">lpierce.479@gmail.com</a>
Bob Pierce (Publisher)	RFP	62 Magrath Dr	72715	337 489 4555	<a href="mailto:bob.pierce.555@gmail.com">bob.pierce.555@gmail.com</a>
Jan Smith	JKS	1 Bacton Ln	72714	315 447 8651	<a href="mailto:janetsmith0841@att.net">janetsmith0841@att.net</a>

# Scheduler Cell Phone Guidelines

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

- All BVCV Scheduler cell phones have the same screen password of 2 4 6 8. Click on the green arrow.
- The phones are for BVCV business only. Please do not set up or use with 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. Clients 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 Clients 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 Clients 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 Clients, it is possible that you'll hear messages from Drivers 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 Client 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 Bella Vista resident, at least 18 years of age, can become a Client (excepting Concordia residents who have their own transportation system). Persons under 18 are not allowed to ride in a Van. (Since May 1 2023, we no longer require COVID-19 vaccinations of our Clients or Volunteers.)
- Appointments with destinations in Bella Vista or Centerton may begin at 8:30 am through 3:30 pm, with return no later than 4:30 pm.
- Appointments with destinations in Bentonville or Rogers may begin at 9:00 am through 3:00 pm, with return no later than 4:00 pm
- **Clients may only schedule a maximum of 3 trips per week**
- Rides involving any type of anesthesia (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 Client 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.
- **For dialysis appointments**, 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).
- **Medical appointments always take priority!** If there is a conflict, Clients 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.
- No more than two appointments starting in a 1-hour time block. A maximum of TWO Clients 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 **return** 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.
- Remember to include destinations for appointments. Whenever possible, use the auto-fill destination record already existing in the System. If a new destination is required, manually enter it for this appt, and then email the information to the System Administrator, who will add the record for future use.

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

- The Bella Vista Courtesy Van expects all our Volunteers to be treated with respect. You are not obligated to speak to a Client 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 Client know someone else will need to get back to them, then contact a Scheduler Liaison.
- If necessary, don't be hesitant to say no to a Client requesting a ride. Most Clients 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 Client that is scheduled for a non-medical ride to reschedule.
- Consider whether we might take a Client to their appointment earlier or pick them up later in order to accommodate the van's schedule. Often Clients 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 Client for just half their transport. Might we take the Client to their destination only or pick them up for the return trip home?
- Even if a Client's request complies with our 2-day advance rule, that is not a guarantee we can schedule their request. Always encourage our Clients 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 Scheduling Liaison or the President to confirm. The President of the Board will make the final decision.

If the Courtesy Van cancels services, please call each Client 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.

Entries here should be made by Bob only  
(RED means this date is a weekend or holiday)

COVID Immun Data  
Verified? **Y**  
Inj Count   
Date of Last

Date	Start Time	End Time	Appt Type	Destination	Notes for this appointment	Wheel chair?	Created by	Cancel?
Mon 11/21/2022	01:00 PM	01:30 PM	Medical	Mercy Clinic Cardiology, 2708 S Rife Medical Lane Suite 220,	Client Canceled 11/20 - JAD	Y	MAD 11/6/2022 043346	N



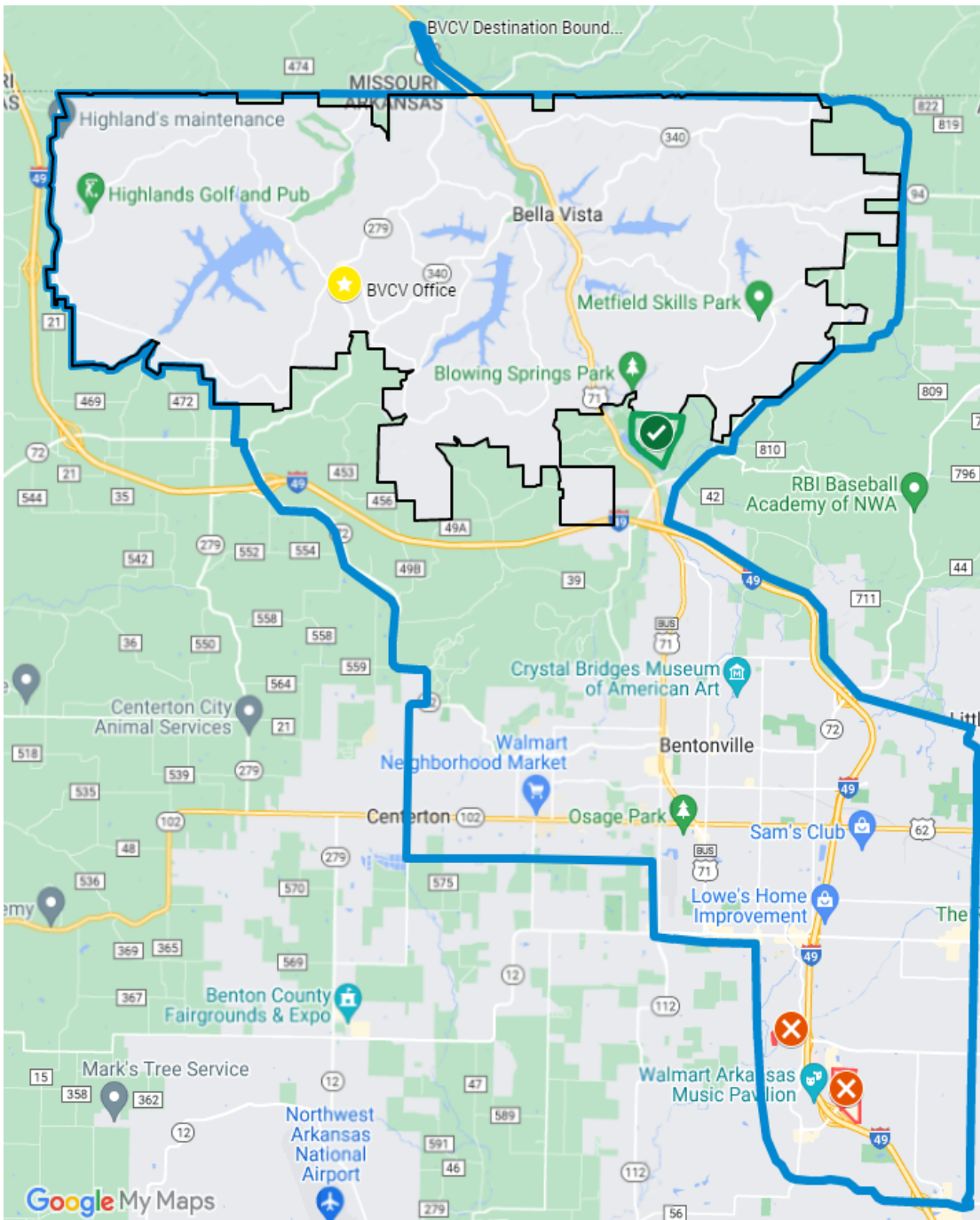
# The Courtesy Van Service Area

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 **TWO EXCLUSION ZONES (the red X's on the map)** that we DO NOT service: Pinnacle Hills Mall and Village On The Creek.



You can access a map of our service area at: <https://tinyurl.com/BVCVMAP> or by clicking on BVCV Service Map from the Switchboard of the BVCV Scheduling System.

Notice that you can SEARCH for a place in this map, which is useful to pinpoint a destination location.



# Overview of Workflow

## **By 5 PM the Afternoon Before The Date of the Schedule**

Appointments are confirmed the afternoon before the scheduled ride date in order to remind Clients they have a scheduled ride, handle any ride cancellations for the next day, and to identify any potential ride conflicts.

Schedulers

(1) Listen to voice mail for messages that require changes or cancellations to the next day's schedule. Process those using the "Clients and Appointment Screen". Next continue on to confirm rides.

(a) Confirm each ride for the day by phone. Mark "confirmed?" as "Y" in the "Confirm Appts or Print Daily Schedule" screen. If you are unable to confirm a ride, make a note to plan to try again in the morning at 7 AM.

(b) By 5 PM, send a text to the Publisher for that day (publishers are noted on the BVCV Scheduler & Publisher Calendar sent monthly by email) that notifies the Publisher of the status of the confirmations (example: "All rides confirmed except John Doe. Will try again in the morning.")

(2) Listen to office messages again, this time working through the requests. Return calls to each message confirming their requested ride or not. Answer any questions asked.

(b) Use the "Scheduler Worksheet Reduced Format" or the "Confirm Appts or Print Daily Schedule" screen, whichever you prefer, to see if the requested Client appointment can fit in the day's schedule. In general, no more than 10 rides per day. No more than 2 rides in an hour block. See "General Scheduling Guidelines", page 7.

(c) There must be at least a business day (M-F) between the Client's message and the requested appointment date. See "General Scheduling Guidelines", page 7.

(2) Confirm each ride for the day by phone. Mark "confirmed?" as "Y" in "Confirm Appts or Print Daily Schedule".

### **By 7:20 AM on the Morning of the Schedule Date**

(1) Listen to voice mail for new messages that require changes or cancellations to that day's schedule. Make a final attempt to confirm any appointments that are still not confirmed.

(2) Send a final text to the Publisher for that day (publishers are noted on the BVCV Scheduler & Publisher Calendar sent monthly by email) that notifies the Publisher of any new schedule changes and/or confirmations. Drivers will decide whether or not to pick up any unconfirmed rider.

### **By 8:00 AM on the Morning of the Schedule**

(8) Handle other requests you might find on the office voicemail.

(9) At 8 AM, listen a final time to voicemail to catch any late cancellations or changes to that day's schedule. If there are changes, call the Drivers' cell phone(s) (see page 3) until you are able to reach a Driver (please do not leave voicemail since a Driver may not have that particular phone). If you are unable to reach a Driver, call one of the Driver Coordinators and if necessary, leave a message.

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

(11) 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.

# 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	bvcvth@gmail.com	BVCVschedTTH1
When not on the schedule but need to login	bvcvextra1@gmail.com	BVCVschedEXTRA1

## BVCV System Screens and Functions

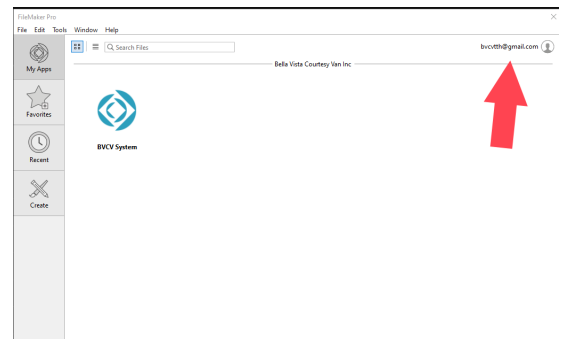
### Accessing the BVCV System (Claris)

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

- (A) Log in to BV Courtesy Van system  
(1) Open File Maker Pro (click on app 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)

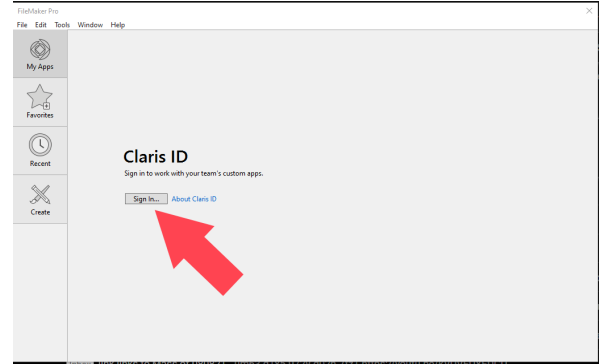


(b) If this is different from your "assigned" Claris ID for your work day, click on profile icon, then click on "sign out"

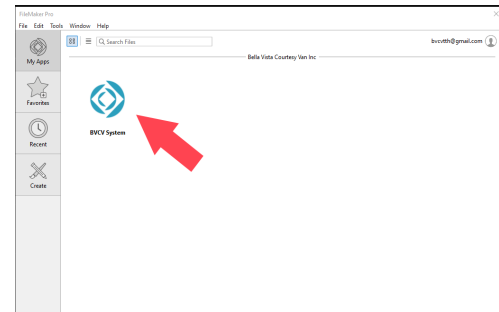
(c) A new Claris sign-in window appears.  
Click on "sign in".

(d) Enter "assigned work day" User ID and  
click "next".

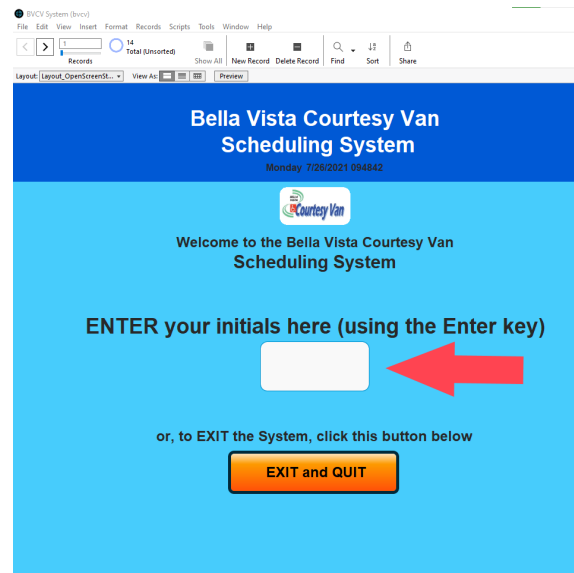
Enter "assigned work day" Password and  
click "sign in".



(3) Double click on BVCV logo or Claris logo



(B) You'll now see the Welcome screen. Now enter your 3-letter initials and press your keyboard's "Enter" key. This will take you to ...



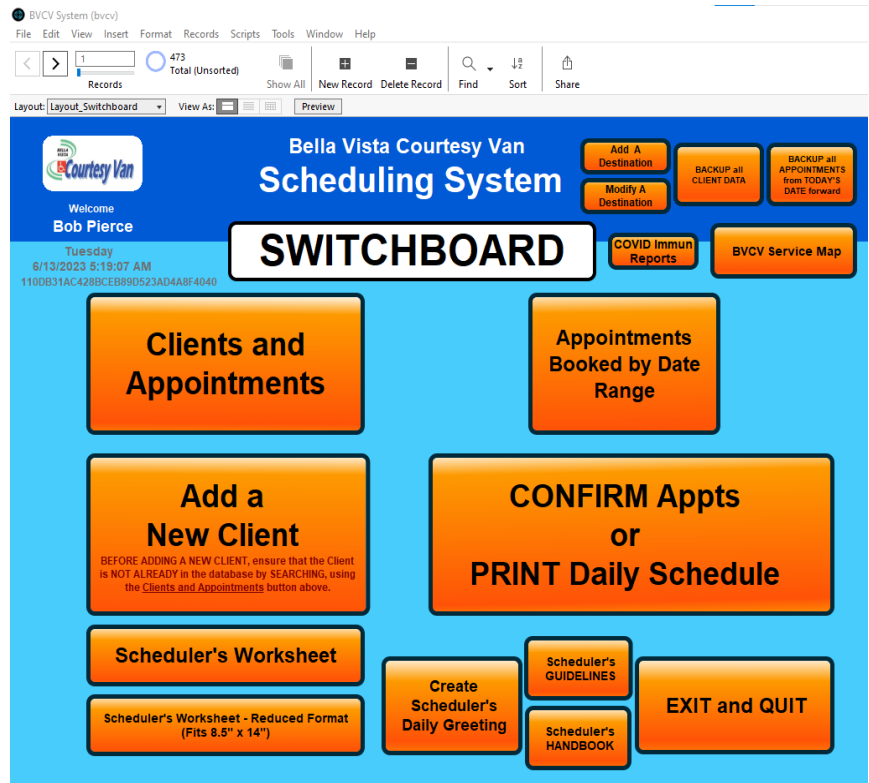
# The SWITCHBOARD

This is the main screen that serves as the gateway to all others. Some of these buttons lead to special support operations and are not available to all users.

Ignore the following areas on this screen as they are either restricted or not pertinent to scheduling:

- Top grayed area "dashboard".
- "BACKUP all CLIENT DATA"
- "BACKUP all APPOINTMENTS from TODAY'S DATE forward"

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



**BVCV Service Map** - Shows the borders of the Courtesy Van's service area

**Clients and Appointments** shows Client details. One of two screens used most frequently ("Confirm Appts or Print Daily Schedule" is the other), this is the screen through which rides are scheduled and canceled.

**Appointments Booked by Date Range** displays a list of appointments within a chosen date range with details. Also, allows the user to access statistics such as number of unique Clients, average number of rides per Client, total rides by day, etc.

**Add a New Client** is the screen through which a new Client is entered. Schedulers may begin the onboarding of a new Client by entering address, phone, emergency contact, etc. **Note: 100% accuracy in adding the New Client's info is critical** for us to be able to communicate the Schedule to the Drivers and for Drivers to complete our mission. **If you have ANY QUESTIONS about how to add a New Client, contact a Scheduler Liaison.**

**Confirm Appts or Print Daily Schedule** is one of two screens used most frequently (Clients and Appointments is the other), this is the screen through which rides are confirmed. It provides a list view of appointments on a particular date with all the Client details.

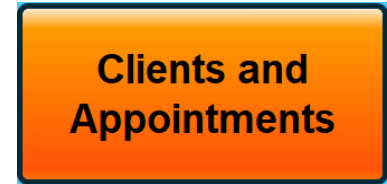
**Scheduler's Worksheet** displays an entire day's schedule including open time slots. **Scheduler's Worksheet Reduced Format** allows the schedule to be printed on a single legal size page of paper.

**Scheduler's Daily Greeting** is only for the Publishers' use.

**Exit and Quit** will log the user off the system and close the program.

# Clients and Appointments

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



## Searching for A Client

- (1) To locate the Client 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 Client and when the name comes up, hit "return", "enter" or "Tab" on your keyboard. If the Client name is not found, go to Add A Client in the next section.



The screenshot shows the 'Client Information and Appointments' screen. At the top, there's a search bar with 'Barrett, Sue, 2 Hebrides Ln, Active is Y' entered. Below this are fields for Last Name, First Name, Address, Phone, and Emer. A 'Go to Switchboard' button is visible on the right. The 'Appointments' section shows a table of scheduled rides with columns for Date, Start Time, End Time, Appt Type, Destination, and Notes. A 'COVID Immun Data' popup is also visible over the appointments table.

## Client Demographics and Basic Information

- (2) Active? Y = active; N = not Active. Client ID: system generated (you can't change this). If an inactive Client is asking to schedule, contact the System Administrator.
- (3) Address: if you need to change the 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: #### #### #####. Always 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 Client.
- (7) Client Notes: these are notes which **remain the same for each ride**. Examples: honk from driveway, use van 16 due to steep driveway, daughter will follow in car, needs assistance in walking, deaf, etc. Also use this field to note when a Client is normally accompanied by a Caregiver.



- (8) Firehouse Directions: system generated. Do not try to change this field, even if it is blank.
- (9) COVID-19 immunization data: No longer needed, so ignore and do not attempt to change.

## Enter or Change an Appointment

(10) 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.

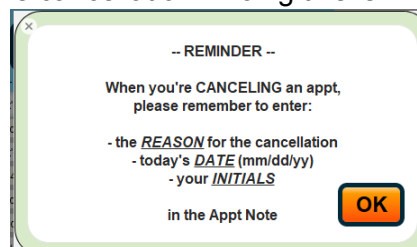
(11) If the Client’s destination is not available in the drop down window, type in a new address - then notify the System Administrator of the address you added so it can be added to the auto-fill for the future. Be thorough - with full address (including zip code) and phone number.

(12) "Notes for this appt": this relates to this **one ride**. It could be noted as a “plus 1 rider”, etc.. This is also the place to enter the reason for a cancellation, such as " Client canceled" or "BVCV canceled". Remember to add your initials and the date.

(13) User ID: system generated

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

(15) 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.



(16) CHANGES TO A SCHEDULED RIDE?

Once an appointment has been entered and the scheduling confirmed with the Client, 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.

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

Date	Start Time	End Time	Appt Type	Destination	Notes for this appointment	Wheel chair?	Created by	Cancel?
Mon 11/21/2022	01:00 PM	01:30 PM	Medical	Mercy Clinic Cardiology, 2708 S Rife Medical Lane Suite 220,	Client Canceled 11/20 - JAD	Y	MAD 11/16/2022 043346	N

-- REMINDER --

When you're CANCELING an appt, please remember to enter:

- the **REASON** for the cancellation
- today's **DATE** (mm/dd/yy)
- your **INITIALS**

in the Appt Note

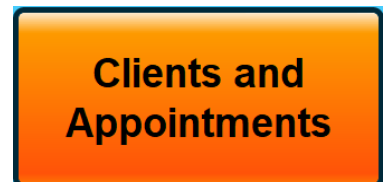
OK

## Criteria for New Clients

To be added to the system, new Clients 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

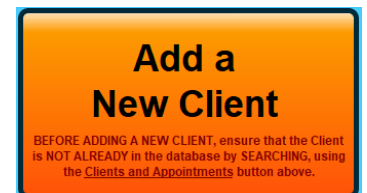
**Before Creating a New Client Record, Search for an Existing Record!** Using the **Clients and Appointments** screen, make sure the person is not already a Client. This check is very important because it eliminates duplicate Client entries. (The System can not individually distinguish by name alone).



If the search for an existing record fails, then go to Switchboard, and choose Add a New Client.

## Creating a New Client Record

- (1) Enter last name. You can enter lower case, the system will automatically capitalize the first letter.
- (2) Enter 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)

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

(5) COVID-19 immunization verified: No longer needed, so ignore.

(6) Address and Zip: enter house number, street and zip code.

(7) Client Notes: these are notes which remain the same for each ride. Examples: “honk from driveway”, “use van 16 due to steep driveway”, “daughter will follow in car”, “needs assistance in walking”, etc.

(8) 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		

(9) Leave the "Directions" field blank. It will be filled automatically.

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

(11) 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.

## Extra Rider

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

Every rider is set up as a Client 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 Client.
- (2) If an additional rider is not yet a Client in the BVCV system, refer to the section on Add a New Client and proceed to add the rider as a new Client.
- (3) Set up another appointment using the additional rider as the Client. Use CAREGIVER as the appointment type. Please note that there are Clients that, at times, will have regular appointments and, at other times, will be riding as a CAREGIVER. For CAREGIVERS, this will cause two rides on the Schedule with the same appt times and destinations. That is acceptable in this circumstance but only counts as one appointment for that hour time slot.

## 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.
- (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 "Client Info and Appts" to make adjustments. Remember to "Reset" the date when re-entering "CONFIRM Appts or PRINT Daily Schedule".



**CONFIRM Appts  
or  
PRINT Daily Schedule**

(4) To CONFIRM 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 **Clients and Appointments**, then go to that Client’s appointments.

- PRINT APPTS SCHEDULED FOR A DATE -

Choose APPT DATE

3/27/2023

Monday

Reset

Number of Appts  
Booked For This Date

7

Bob Pierce  
3/25/2023 141716  
337 489 4555

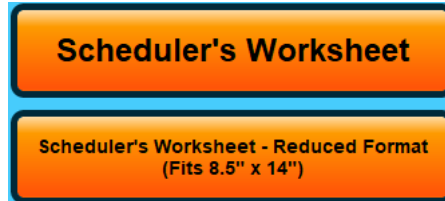
Go to  
Switchboard

Appt Date	Appt Start	Appt End	Last	First	Appt Type
3/27/2023	09:00 AM	12:30 PM	Isenhower	William	Personal
Phone(s) 479-685-8608			Emerg 479-685-8608 Daughter Sheila		
Client Address 2 Joanie Ln		Zip 72715			
Confirmed? <input type="checkbox"/> N <input type="checkbox"/> Y		Vac? <input type="checkbox"/> Y <input type="checkbox"/> N			
Client Special Needs					
Cane					
Daughter requested for in the back seat Client because it's easier to h get in and out of Notes van.					
Appt Notes					
Firehouse Directions FROM S1: 340 W TO L ON E CHELSEA TO 1ST R PAST BASIDLON DR ON ESTES DR TO 1ST L					
Destination <b>Benton County Sr Center, 3501 SE L St, Bville 72712</b>					
Driver		Notes		Client ID 38332 Appt <b>1</b> of 7	

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

## Scheduler's Worksheet

(The same info in 2 formats)



(1) Always click on the date field in the upper left corner. Choose your date from the pop-up calendar. This report takes time for the system to sort through the data. Be patient.

(2) This is available to print in 5 letter-size pages or 1 legal-size page while you work through your confirmation calls. Your choice. It lists the Client names, addresses and phone numbers in time order, in appointment blocks. Remember: this is a scheduling aid - this is not where you tell the System of your confirmations. You must go to "CONFIRM Appts or PRINT Schedule" to physically "confirm" a ride (ie change the "N" to a "Y").

## 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.



Stats For These Appts (Quick View)

Stats For These Appts (Print Format)

(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.

Include CXs?  N      Export?  N

(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 and Corrections

Date & Inits	Page & Location	Description of Change

