

Ride Alliance (VTCL)

Framework for Early Adopters

I. Definitions

- A. The “requestor” is the agency that uploads trip data into the trip exchange for another provider to fulfill. **The requestor is responsible for payment to the provider and the owner of the trip for reporting purposes.**
- B. The “provider” is the agency that claims the trip from the trip exchange and is responsible for delivering the direct service to the consumer. **The provider does not own the trip for reporting purposes.**
- C. “Maximum charge” is the maximum amount a requestor is willing to pay for a provider to complete the ride on their behalf.
- D. “Charge” is the amount the requestor will pay the provider for completing the ride on their behalf.
- E. “Fare” is the cost of the ride for the consumer.
- F. The “trip exchange” is data exchange system that allows providers to transfer trip information to share trips.
- G. **An “agent” is a non-provider requestor that may upload trip data to the trip exchange for providers to fulfill. In general, the role of a facilitator is like that of a requestor.**
- H. A “Consumer” is a rider or client.

Commented [EMH1]: Highlighted sections = the financial portions of the Hub are not built out yet. Should this be included in the early adopter’s framework or is this for the future state?

Commented [EMH2]: Question to sort out: who will pay for trip if agent referral?

II. Operating Practices for Transportation Providers

- A. General expectations of all requestors, providers, and agents using the trip exchange:
 1. **All requestors and providers commit to checking the trip exchange daily, see timelines in section C2.**
 2. All requestors and providers will assign a designated point of contact and alternate, for the purpose of coordinating trips during the **pilot phase.**
 3. DRCOG, as an agent, will assign a dedicated point person, and alternate, to monitor the trip exchange to assist as needed to coordinate trips during the pilot phase.
 4. All requestors, providers, and agents will agree to abide by the data standards rules as stipulated in section ____.
- B. Types of Trips
 1. Because the goal of this pilot is to test coordinating trips using the trip exchange, requestors and agents will attempt to submit trips to the trip exchange that can be **reasonably** picked up by a provider.

Commented [EMH3]: Will the new “system” address automation and service boundaries? At minimum, **the new system will need to screen trips using a boundary.** Otherwise you’ll be scrolling through lots of trips that aren’t anywhere near your service area. This will likely cause frustration and then people will opt out.

Commented [EMH4]: Does a contact list for providers need to be included as part of this project?

Commented [EMH5]: Does this need defining? Also, what about trips to the VA?

2. Trips will only be located within these specific boundaries as noted in the participating pilot transportation providers service boundaries. These boundaries include:
3. Type of trips will vary but may include demand response trips, trip transfers, multi-leg trips, and will call trips.
4. Standing trip requests and same day trip requests will not be permitted during the pilot phase.

Commented [EMH6]: Can this be the DRCOG region? DRCOG AAA region?

Commented [EMH7]: Question: do we need to define these trip types? Second: flush out trip transfer trips (what's the difference b/t multi leg trip and transfer)?

Commented [EMH8]: What about children? Some providers serve children. I anticipate that they won't be part of the pilot but will they be part of the project? For MSA, it was no kids under 8 (because of car seat issues) and providers who didn't service kids wouldn't do those trips).

Commented [EMH9]: The system allows for seven days before the trip is deleted. Do we want to make the change to seven? Pending requests will be removed automatically from the system after seven days

Commented [EMH10]: Flush out -define hours and what this mean (that requestors will put in trips during X hours, or that trips can only be provided during X hours?)

C. Timelines

1. All requestors and providers agree that same day service is not allowable under this framework. One to five calendar days advanced reservation is required.
2. Trip during the pilot will only be exchanged during the hours of ___am to ___pm, Monday through Friday.
3. In order for a trip to be considered for the pilot, all requestors and providers agree to the following timelines:
 - a. By 2:00 pm every day, all trip requests must be entered in to the trip exchange by requestors and agents
 - b. By 2:30 pm, all providers will log in to the trip exchange and begin to consider which trips they may want to provide
 - c. By 4:00 pm, all providers must have claimed any trips they want to provide for the following day
 - d. By [redacted], all providers who have claimed a trip will then communicate with the consumer and communicate all details necessary to perform the trip.
4. Any trips that are not claimed by 4:00 pm remain the responsibility of the requestor. It will be the requestor's responsibility to communicate with the consumer any updates necessary.
5. Does the trip exchange automatically rescind trips if they are not fulfilled by a certain time prior to the requested pick up time? Or would the requestor need to go in and manually delete the trip?

Commented [EMH11]: Need to ask if there is a set time everyone can agree on. Especially important for next day service

Commented [EMH12R11]: Can any of this be automated through the system? How does this work with RM notification system?

Commented [EMH13]: This doesn't match the Operating Practices 4C (below)

Also, this addresses a trip that has been put in that day (essentially) what about a trip that was put in a week ago? It will be very stressful for a client to not know if they have a ride that entire time and will likely result in cancellations.

D. Operating Practices for all requestors, providers and agents.

1. Prior to pushing a trip the trip exchange, requestors and agents will complete the following tasks and abide by these expectations:
 - a. The requestor will inform the consumer that their ride will be entered in to the trip exchange.
 - b. Prior to entering in trip data, it is the responsibility of the requestor to ensure the consumer is informed of potential required fares that would need to be paid by the consumer.

- c. It is the responsibility of the requestor to screen the client and ensure that all necessary information is attained to upload the trip to the trip exchange. It is the responsibility of the provider to verify all necessary information received by the requestor.
 - d. The requestor has control over the trip until it is claimed by another provider and may change the status of the trip or remove it from the trip exchange. While the trip remains unclaimed the requestor is responsible for keeping the consumer informed of any status changes.
2. In order to push a trip to the trip exchange, the request or agent will complete the following steps as outlined in the _____ document/appendix.
 - a. See User Manual
3. When a trip goes unclaimed, all requestors, providers, and agents will complete the following tasks and abide by these expectations:
 - a. If the ride is not claimed _____ hours before the trip is supposed to be performed, the requestor should delete the trip from the trip exchange and inform the rider _____
 - b. The requestor is responsible for notifying the consumer if the trip cannot be scheduled through another provider, and as necessary provide information and referral assistance to the consumer.
4. When a trip is claimed by another provider, all requestors, providers and agents will complete the following tasks and abide by these expectations:
 - a. ~~Requestor can approve or deny a provider based on their service and provider standards~~
 - b. If the requestor typically charges the passenger a required fare and a trip is picked up by a provider that doesn't charge a required fare, the requestor should recommend the consumer provide the fare as a donation to the provider's program. _____
 - c. The requestor is responsible for providing the client information regarding who will be picking them up for the trip, ensuring the customer understands any branding, or lack thereof on vehicles that would be picking them up, and that they would not be picked up by the requestor.

Commented [EMH14]: I don't think we need this. I think this is automated by the Hub at 4pm the day prior.

Commented [EMH15]: Is this agreed upon by everyone? What about the providers suggested donation amount?

Commented [EMH16R15]: Some providers don't allow drivers to collect money. Elaborate process.

d. Once a trip is claimed by the provider the provider has control of the trip until the services are delivered and confirmed on the trip exchange. The provider is responsible for 1) providing the service, except in extraordinary circumstances, and 2) notifying the consumer and the requestor of any status changes.

Commented [EMH17]: This doesn't match section 4c above:

By _____, all providers who have claimed a trip will then communicate with the consumer and communicate all details necessary to perform the trip.

5. Other operational protocols

a. Each agency shall maintain internal procedures to follow for interactions between consumers. This includes procedures to be followed in the event:

- a provider arrives at the pickup address and the consumer cannot be located.
- inclement weather causing delays or cancellations
- notifications and reminders of when the trip will be performed

b. Consumers will be advised to call the requestor directly if they need to cancel or change a trip reservation. In the event that a consumer calls the wrong entity, they will be directed back to the requestor.

c. If a requestor needs to cancel a trip that has already been claimed, then the requestor shall inform the providers through the following means:

- Less than two hours before pick up: the dispatcher from the requesting agency will call the dispatcher from the providing agency to inform them of the cancellation.
- Greater than two hours before pick up: the contact person from the requesting agency will rescind the trip in the trip exchange

d. A trip that is modified during its lifecycle is generally treated as a trip that is created and then cancelled, with a new trip replacing the original trip.

- If the requestor cancels the original trip, creates a new trip (for example, an hour early), the provider who accepted the original trip gets first choice at accepting the new trip. If they do not want it, it goes back to the trip exchange for all providers to see.
- Modifications that do not result in a new trip being set up are limited to:
 - i. Clarifying pick up door (as long as location is the same).

Commented [EMH18]: A trip your agency previously claimed but which was rescinded is again available Message states:

"Trip ticket [original trip ticket number] that you previously claimed but was rescinded by [member name] due to trip logistic changes has been re-submitted as trip ticket [new trip ticket number] and is available exclusively to you to claim again until [date/time of expiration of exclusive claiming period]"

- ii. Clarifying mobility type (as long as it does not change the need for a lift).
 - iii. *Note: If a driver shows up and cannot locate passenger the agency's internal procedures shall be followed. The originating agency will be notified by telephone.*
- e. The data exchange hub shall provide a notes field for drivers regarding client, pick up points, road closures, etc. The notes field is integral to performance of trips.
 - f. Trip verification: for systems requiring verification at the completion of trips (i.e., RouteMatch), verification must occur within two business days after trip completion.

III. Financials

- A. To maintain non-duplication of trips being reported to applicable entities, the requestor retains reporting responsibility for the trip, which includes reporting on performance metric reports (including the National Transit Database). ~~Requestor's may be able to seek reimbursement for trips through applicable grants, subject to the grant's requirements and approval processes. Providers will not seek reimbursement through grants or report the trip on performance metric reports.~~
- B. Each agency will make available information on how the charge to the requestor will be calculated. This may vary by agency.
- C. The requestor retains the right to enter a maximum amount that they are willing to pay into the trip exchange. If the maximum charge field is left blank, the provider's normal charge calculation will be used, and the actual cost of the trip will be charged to the requestor. Otherwise, the amount charged to the requestor will be the lessor of the providers typical charge, or the maximum charge.
- D. In the event that a provider has accepted a trip and the trip must be canceled for whatever reason, the trip must be canceled ____ hours in advance otherwise the requestor still must pay the provider.
- E. Can they still charge to the \$5000 if the client cancels the ride?
- F. Can the \$5000 be used to pay for fares?
- G. What are we going to charge, per mile? Per trip?

Commented [EMH19]: Is there a way (or desire) for consumers to pay for the trip? Maybe the provider would bill the client for the trip. For example, SRC can't provide the trip (would normally be a no). Tells client this, offers to put it on the Hub and asks what the client would be willing to pay. Client says \$20. This becomes the trip maximum. Could the client pay for it?

Commented [EMH20]: Need to discuss this for Pilot. Without the ability to run financial reports, this will be difficult.

Commented [EMH21R20]: Also, will this require SUA approval of providers (etc.)?

Commented [EMH22]: This requires an enhancement

IV. Provider Profiles

- A. Every participating provider must fill out a Service Provide Profile and/or the opt in form
 - 1. See appendix ____

V. Data Entry Rules

- A. As described in Appendix C of the MSAA Data Exchange Hub Systems Requirements. (Appended Below)
- B. THINGS TO DEVELOP (HK)
 - 1. IDs
 - 2. Service = HUB
 - 3. Data verification

VI. Agreements

- A. What sort of agreements need to be in place?
 - 1. MOU, IGA?

Commented [EMH23]: In operating practices above

Commented [EMH24]: How long does data need to be stored in the Hub? Right now, it is stated to always be one month:
Data shall be retained in the Hub until restrictions are needed due to volume, however this shall always be more than one month.

B.

Appendix C

I. Client Intake Guidelines

Purpose: To properly enter all data into RouteMatch to produce consistent reporting or gathering of data.

Frequency: As needed

Procedure: The following guidelines are to be followed when entering any information into RouteMatch. Keep in mind not only is this information used for trips but mailings and statistics and DRCOG reporting. All entries must be professional and accurate.

All fields with * on intake form designate demographic data collected by the state and federal government to support the need for continued funding for this program. This data will be de-identified and used in aggregate form to complete statistical information. None of the data is sold to a third party and any personal information will only be used in an effort to better serve the client in providing him/her services.

General: Upper and lower case is be used
No periods

First Name: Proper and accurate with no "quotes", no (xx) using what the customer desires to be addressed as (use your discretion). To be most client friendly please ask the client how they wish to be addressed understanding mailings will use the same. (Example: Mary wants to be called Diamond =Diamond, Edward wants to be called Ed=Ed, George Bob wants be called Bob=Bob, Bobby wants to be called Butch=Butch.

Official Name: When using a nickname or shortened name please use this filed to put in the legal name.

Last Name: Spaces are allowed as per Clients wishes, use hyphens, Use upper/lower as told by client, and apostrophe.

(Example: Van Gordon, Smith-Gordon, O'Brian)

- When searching in RM you will have to search both ways when it comes to spacing. Make sure to do this before creating duplicate record.

Address: Use address abbreviation guide, using address 2 line for apartment # or building # if needed. Please refrain from using the # symbol and just put the numeric or alpha information.

Date of birth: Since our program is specifically for the elderly, particularly for persons age 60 or over, the date of birth needs to be filled in. In the client refuses please enter January 1 and the year which would make them the age they are stating. Then indicate in comments client would not provide DOB.

Commented [EMH25]: These client intake guidelines were for RM systems. How does this work with other systems? Are these all agreed upon?

Language: Is that most understood or spoken even if many apply.

Ethnicity & Hispanic or Latino: please choose from categories in drop down screen for ethnicity and mark yes/no for other. In addition to ethnicity question you must also ask if the client is Hispanic or Latino. These are 2 different questions that need to be asked separately and a separate answer provided.

Elderly: If client is over 75 [Note: Broomfield checks elderly for everyone over 60 so they can pull reports quickly. Would SRC be willing to change on this?]

Commented [EMH26]: Flush out

Or

Age 60-74 wheel chair, or needing assistance with 2 daily life functions
(wheelchair, oxygen, cooking, walking as examples)

Disabled: Please use when client is in wheelchair, vision/hearing impaired, physical or mental disability or other qualifying disability

Low income: Under poverty level as stated on intake form

How many people live in household: needed for statistical purpose only, if client refuses for any reason put n/a

What is your monthly household income (from all parties in household including self): needed for statistical purpose only, if client refuses for any reason put n/a

Commented [EMH27]: Is this needed if the low income status is on there?

II. Addressing Abbreviations

Purpose: To properly enter all data into RouteMatch to produce consistent reporting or gathering of data.

Frequency: As needed

Procedure: The following guidelines are to be followed when entering any information into RouteMatch.

Upper and lower case is be used

No periods

Abbreviations:

Apt = Apartment

Ave = Avenue

Bldg = Building

Blvd = Boulevard

Ctr = Center

Ct = Court

Dr = Drive

E = East

Hwy = Highway

MHP = Mobile Home Park

N = North

Pkwy = Parkway

S = South

Sp = Space

Ste = Suite

St = Street

Svc = Service

Th = Town Home

Wy = Way

W = West

III. Standard Definitions

Mobility Requirements

Ambulatory
Wheelchair
Knee Walker
Unstable needs assistance
Walker
Ambulatory Lift
Ambulatory
Scooter
Extended Leg W/C
D2D Ambulatory

Service Needs*

Oxygen
Walker
VIP = Visually impaired HIP
HIP = Hearing Impaired
MIP = Memory Impaired
Wheelchair
Electric Wheelchair
Wide Wheelchair
Wheelchair, can transfer
Scooter
D2D = door to door
DTD = door through door
NLA = never leave alone/no leave alone
Crutches
Cane
Service Animal
Driver Alert
IDD = Intellectually or developmentally disabled
SD = Seizure Disorder Other

*Gate codes and "unstable" will move to notes instead

Trip Purpose*

Medical
Personal
Employment
Adult Day Program
Grocery
HR = Health Related (includes dentist, pharmacy, etc.)
Dialysis
Recreation

*There may be other codes that providers may use but those trips are not likely to be put in the trip exchange (for example, Broomfield meal program code).

Medical Problem ID

MIP = Dementia
VIP = Vision Impaired
HIP = Hearing Impaired
IDD = Intellectually or developmentally disabled
SD = Seizure Disorder
Mental Health
Speech Impaired
Temporary Disability
Neurologic and Degenerative Diseases
Kidney Disease

VII. Trip Exchange Manual – already produced by MSA