



Transportation – FSC Job Aid

The *Transportation* screen allows users to document the provider's transportation of clients and search for transportation that has already been documented. A Contact will be added to each client's Case with the transportation details once the transportation has been saved.

Transportation

Transportation Search

Provider
-Select- ▼

Facility
-Select- ▼

Reason For Transportation
-Select- ▼

Total Miles
-Select- ▼

First Name

Last Name

Client ID

Date From

Date To

Add Trip

Search

Search Results

Search:

▲ Facility ▼ ▲ Reason For Transportation ▼ ▲ Date ▼ ▲ Start Time ▼ ▲ End Time ▼ ▲ Total Miles ▼ ▲ Individuals Transported ▼

Show 10 ▼ entries

First Previous Next Last

Navigation

- From the **Dashboard** : Click the **Transportation** button in the **Actions** pane.

Actions

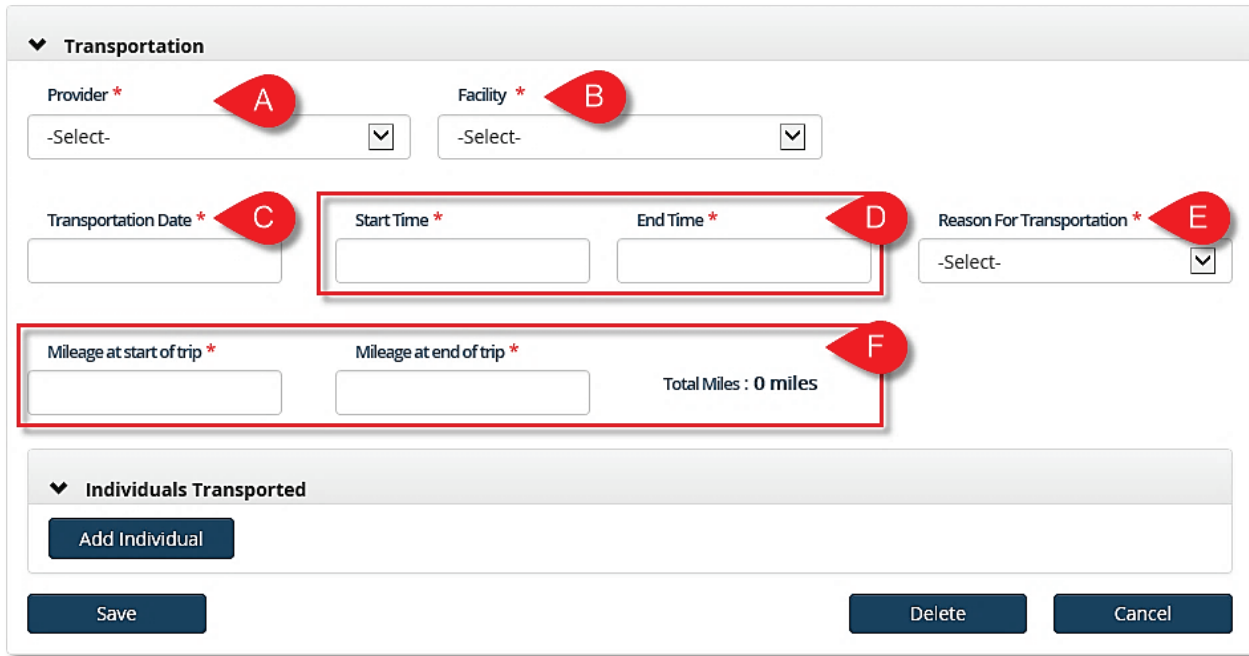
Search Existing Clients

Group Events

Transportation 

Adding a new Trip

- When the user navigates to the transportation screen the **Transportation Search** pane will be visible. To document a trip, click **Add Trip** at the bottom of the pane.

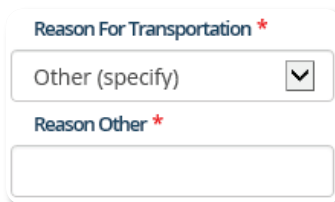


The screenshot shows the 'Transportation' form with the following fields and callouts:

- A**: Provider * (dropdown menu)
- B**: Facility * (dropdown menu)
- C**: Transportation Date * (text input)
- D**: Start Time * and End Time * (text inputs)
- E**: Reason For Transportation * (dropdown menu)
- F**: Mileage at start of trip * and Mileage at end of trip * (text inputs), with Total Miles : 0 miles displayed below.

Below the main form is a section titled 'Individuals Transported' with an 'Add Individual' button. At the bottom are 'Save', 'Delete', and 'Cancel' buttons.

- Provider**: This lists the name of the provider(s) that the logged in user is affiliated with. If the user is affiliated with more than one provider, a specific provider can be selected from the drop-down.
- Facility**: This lists the facility or facilities that are associated to the selected Provider. To view a calendar for a specific facility (location) select that facility from the drop-down.
- Transportation Date**: Enter the date that the trip occurred on. This cannot be future dated.
- Start Time and End Time**: Enter the start and end times of the trip.
- Reason for Transportation**: Select the reason why the client(s) were transported. If "Other (specify)" is selected the *Reason Other* field will appear and can be completed.



The dropdown menu for 'Reason For Transportation *' shows 'Other (specify)' selected. Below it, the 'Reason Other *' field is visible and empty.

- Mileage at start of trip, Mileage at end of trip, and Total Miles**: Enter the mileage at the beginning and end of the trip. Synergy will automatically calculate the *Total Miles* based on the start/end mileage entered.



Adding Individuals to a trip

1. **Individuals Transported**: Click **Add Individual** to document who was transported.

Individuals Transported

Add Individual

Add Individuals

Search

First Name *
Susie

Last Name *
Sunshine

Gender *
Female

Search **Cancel**

Search Results

Search:

Select	Case ID	Client ID	First Name	Last Name	Gender	DOB	Last Contact	Case Status	Facility
☐	+ 1501	569185	Susie	Sunshine	Female	01/02/2001	04/18/2017	Enrolled	FAMILY RESOURCES - 1801 CENTRE AVE
☐	+ 1607	569185	Susie	Sunshine	Female	01/02/2001	04/21/2017	Enrolled	FAMILY RESOURCES - 1801 CENTRE AVE

Show 10 entries

First Previous 1 2 Next Last

Add

IMPORTANT NOTE:

Only enrolled clients can be transported.

- Enter the attendee's *First Name*, *Last Name*, select their *Gender* from the drop-down and click **Search**. Clicking **Cancel** will close the pop-up without adding anyone.
- Review the *Search Results* and determine if the attendee is listed.
- Search: Use the Search field to filter the *Search Results* list down further.



- d. To view the Household Members of a Case in the *Search Results*, click the plus sign [+] to the left of the *Case ID* in the grid to expand the results. Select clients by checking the checkbox next to each individual who was transported.

☐	- 335	2952	Susie	Sunshine	Female	01/01/1985		Enrolled	FAMILY RESOURCES - 1801 CENTRE AVE
	☐	2957	Lucy	Sunshine	Female	2/2/2015		Enrolled	FAMILY RESOURCES - 1801 CENTRE AVE
	☐	2991	June	Sunshine	Female	5/17/2012		Enrolled	FAMILY RESOURCES - 1801 CENTRE AVE

- e. To add the selected clients, click **Add**.

2. All selected individuals will appear in the **Individuals Transported** pane.

Individuals Transported					
Case ID	Client ID	First Name	Last Name		
1501	569185	Susie	Sunshine		
1484	567905	Sally	Sunset		
Add Individual					

- a. Additional individuals can be added by clicking **Add Individual** and repeating the search and selection process.
- b. To delete an individual from the list, click the Delete Icon [] to the right of the individual in the grid.
- i. A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the individual. Clicking **No** will cancel the action and the individual will not be deleted.

3. Completing the Trip:

- a. Once all of the trip information has been entered click **Save**.
This will save the trip and navigate back to the Transportation Search screen.
- b. To delete a trip, click **Delete**.
A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the trip. Clicking **No** will cancel the action and the trip will not be deleted.
- c. Clicking **Cancel** navigate back to the Transportation Search screen without saving the trip.



Transportation Search

1. The fields in the Transportation Search pane can be used singularly or in combination to filter the results down to the desired trip(s). Note: *Provider* and *Facility* are required selections for any search.

The screenshot shows a 'Transportation Search' form with the following fields and callouts:

- A**: Provider (dropdown menu)
- B**: Facility (dropdown menu)
- C**: Reason For Transportation (dropdown menu)
- D**: Total Miles (dropdown menu)
- E**: First Name (text input)
- F**: Last Name (text input)
- G**: Client ID (text input)
- H**: Date From and Date To (date range input, highlighted with a red box)

At the bottom right of the form are two buttons: 'Add Trip' and 'Search'.

- a. *Provider*: Select the name of a provider agency.
 - b. *Facility*: Select the name of a specific provider facility (location).
 - c. *Reason for Transportation*. Select a Reason to filter the results by.
 - d. *Total Miles*: Select a mileage range to filter the results by.
 - e. *First Name*: Enter a first name to search by that criteria.
 - f. *Last Name*: Enter a last name to search by that criteria.
 - g. *Client ID*: Enter a Client ID to search by that criteria. Note that this is not the MCI ID.
 - h. *Date From* and *Date To*: Entering a date range allows the search to be filtered down to a specific time period.
2. Click **Search** to bring up the **Search Results** pane.



Search Results

1. The **Search Results** pane contains a **Search within...** field from which the user can filter the grid down to any grid item containing all or part of a word, date, or number.

Search Results

Search :

Facility	Reason For Transportation	Date	Start Time	End Time	Total Miles	Individuals Transported
FAMILY RESOURCES - 1801 CENTRE AVE	Community Based Services	05/01/2017	09:00 AM	10:00 AM	5	Sally Sunset

Show entries

First Previous **1** Next Last

2. Navigation: Click on a trip's line in the *Search Results* grid to navigate to that specific trip.

For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access I-Service, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>