



Provider Mobile Application

User Guide

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OVERVIEW

Provider Mobile is a mobile app available on Android and iOS to help enhance the real time data exchange between brokerages and providers that are using the TripSpark product suite. The app can be downloaded through the Google and Apple app stores under the name of the trip brokerage.

Once the app has been installed, drivers are able to log on to:

- View and perform assigned trips
- View and accept additional trips that have not been assigned to anyone yet
- Mark themselves as “available” or “unavailable” to assist in trip assignment

This user guide is intended for drivers and helps provide instructions on how to use the app. Note that most of the screenshots in this guide will be from the Android app. The iOS app provides a similar experience.

HOW IT WORKS

As illustrated in Figure 1 below, members request for rides through the trip broker, who tracks the trip details through software. Based on a number of factors, the broker will select a provider to handle the trip. Once assigned, the provider will use the same software system to accept or decline the trip. If the provider chooses to accept the trip then they will assign the trip to a driver and vehicle where they see fit. In some cases, the provider may choose to leave the trips unassigned and allow drivers to sign up for available trips themselves.

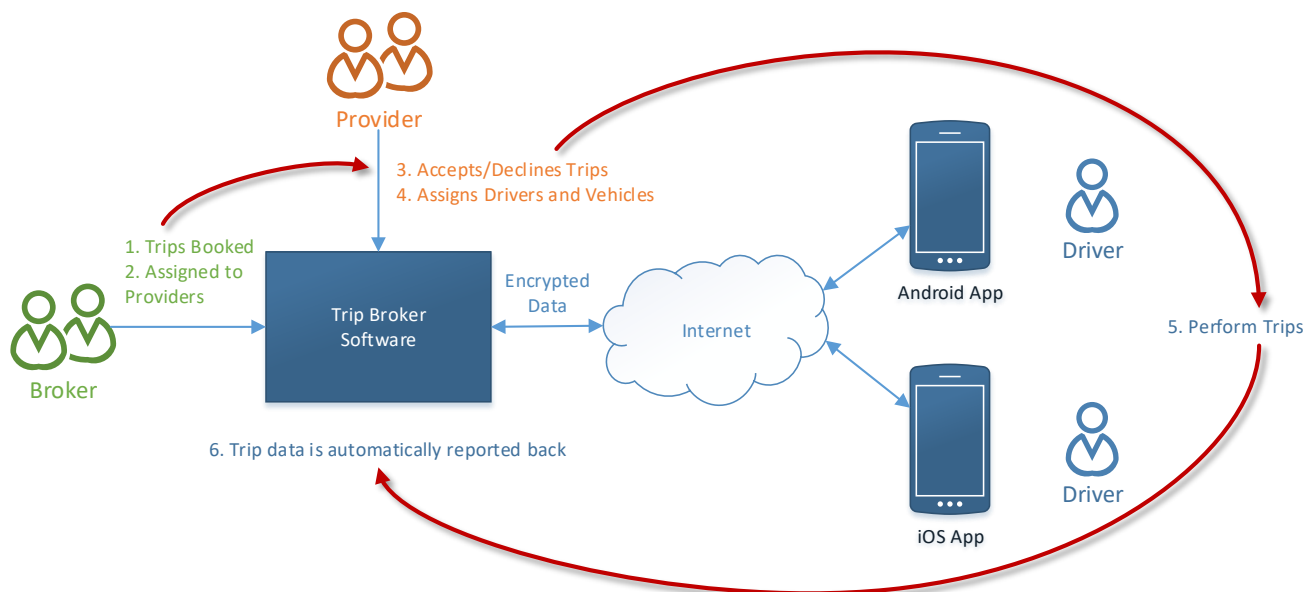


Figure 1: Diagram that illustrates the process for receiving and performing work.

With Provider Mobile, drivers can use the app to see the work that has been assigned to them, or to sign up for new work. The app will also keep track of what's been completed as the driver picks up passengers and perform their work, so that the driver no longer needs to jot the information down themselves. The information, including odometer, location, pick up and drop off times, and also the passenger's signature (if required) are all submitted back to the back office software for visibility and billing purposes.

Both the Android and iOS apps require location permissions. The phone also needs to be in data coverage in order to receive trips and submit trip completion data.

LOG IN

You will be prompted to log in whenever you launch the app on your phone (Figure 2). The app contains protected health information (PHI) and therefore requires you to verify your identity each time it is launched.

After logging in, you will be required to accept the privacy agreement in order to use the app (Figure 3).

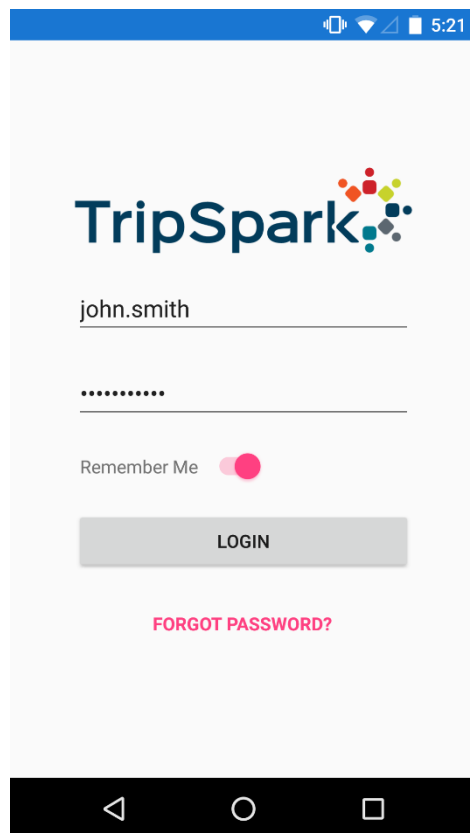


Figure 2: The log in screen.

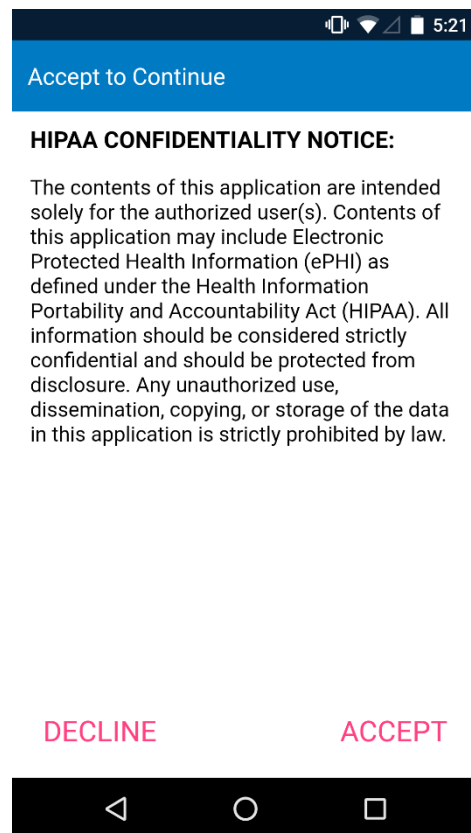


Figure 3: You must accept the agreement in order to use the app.

Next, enter information about the vehicle that you are using to perform the trips (Figure 4). Click on the “Vehicle” field to select from a list of known vehicles in the system. The details of the selected vehicle will be displayed. Please verify that you have selected the right vehicle by reviewing the details.

You must also enter the current odometer of the vehicle. The odometer will be automatically updated as you drive around, but must be updated during log in, and any time after you change your status to “unavailable”.

Once you have logged in, Provider Mobile will appear in the notification area (Figure 5) for Android devices. If you switch applications, you can find Provider Mobile again easily by dragging from the top of the screen as long as your status is marked as “available”.

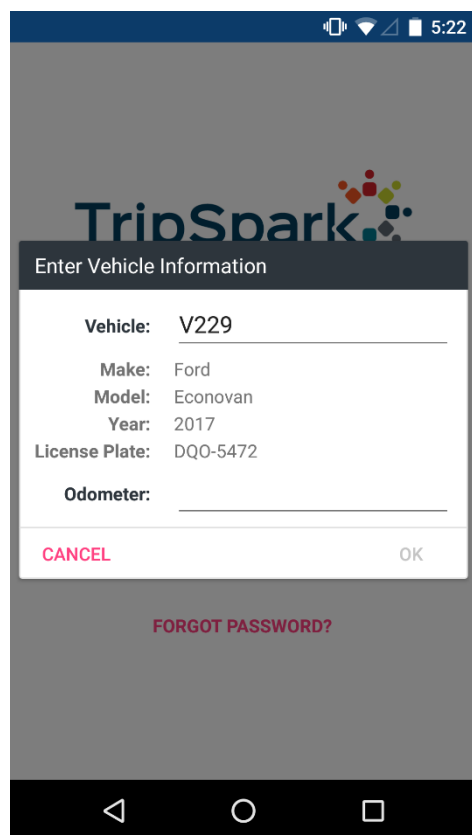


Figure 4: Entering vehicle information on login.

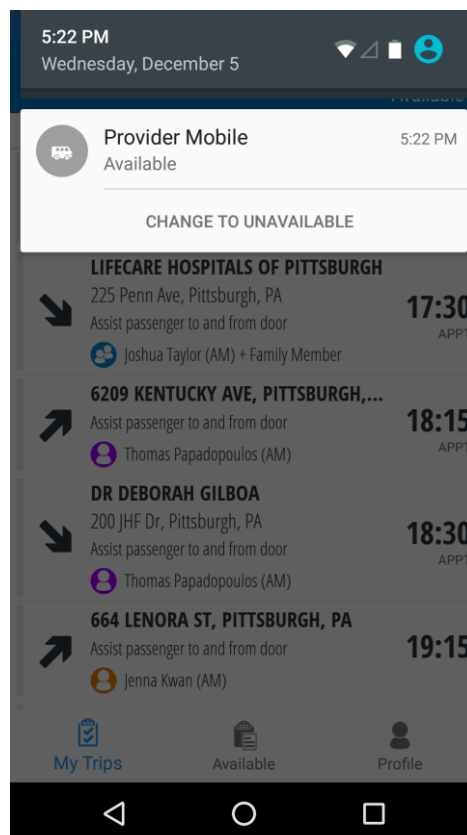


Figure 5: On Android, Provider Mobile will always appear in the notification area.

FORGOT PASSWORD

You can use the “Forgot Password” link on the log in screen to reset your password (Figure 6). To begin the process, you need to provide your username (Figure 7). Your account is set up by your agency or the broker. Please contact your system administrator if you have forgotten your username.

For security reasons, you will be sent a verification code to prove that the account belongs to you (Figure 8). You may choose to receive the verification code through email or phone number. At least one of the two pieces of information must be set up in order for you to receive a verification code. The email and phone number are masked to protect user privacy from unauthorized users.

Choose your preferred method of communication and press the “Send Code” button.

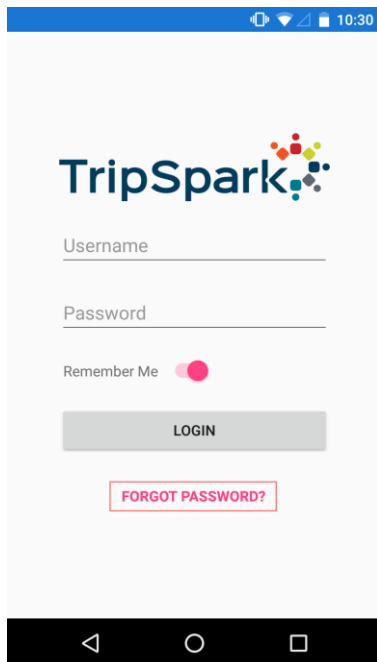


Figure 6: The "Forgot Password" link at the bottom of the log in page.

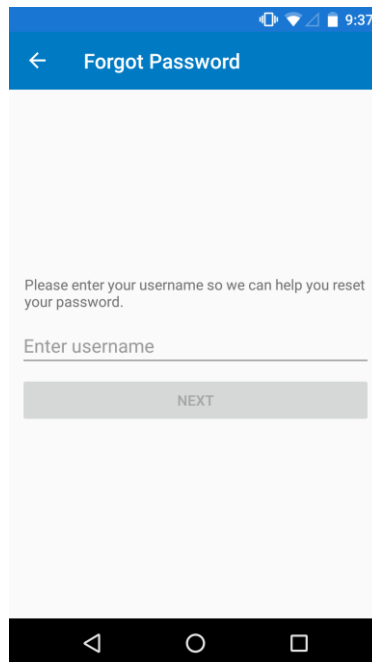


Figure 7: Enter your username to reset your password.

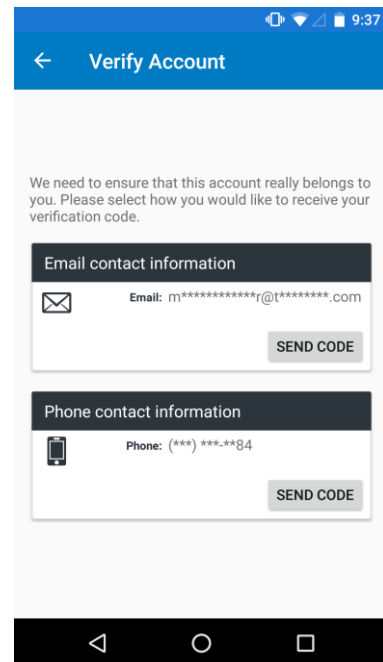


Figure 8: Choose where to receive the validation code.

Enter the code that you have received back into the app (Figure 9), and then press the “Verify” button. If you did not receive the code, you can press “Resend Code” or go back and choose another method. Once the code has been verified, you will be able to reset your password (Figure 10). Please make note of your agency’s password policy when choosing a new password.

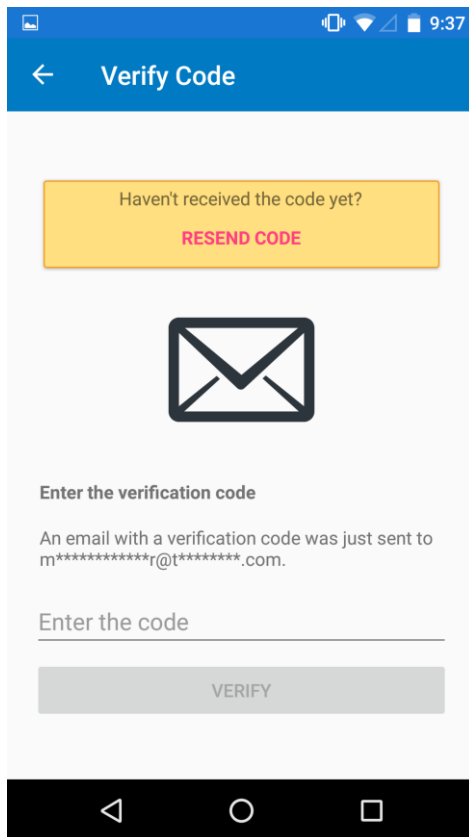


Figure 9: You must enter the verification code in order to reset your password.

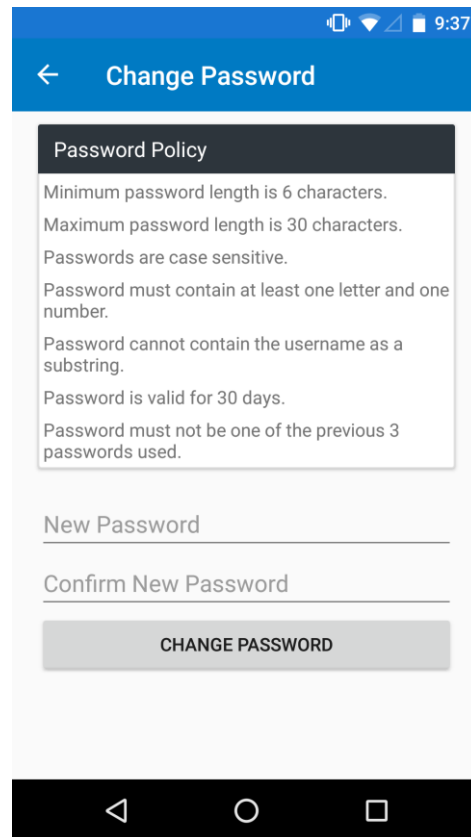


Figure 10: The password reset form.

PERFORMING TRIPS

MY TRIPS SCREEN

After logging in, the first page that is shown is your list of assigned trips for the day. Each trip has two parts: one to pick up the passenger, and one to drop them off. Each of these are listed separately with their own address and time information, and can be distinguished based on the left most arrow icon.

The passenger(s) of the trip is also displayed. Next to the name of the passenger(s) is a colored icon. This colored icon will appear the same on both legs of the trip and can be used to help you quickly identify the trip visually.

The time at which you need to be at the specified location at is shown on the right side of the trip leg. An “APPT” label will appear under the time for trips that are appointments.

Figure 11 provides a quick guide of the information that is shown on the screen.

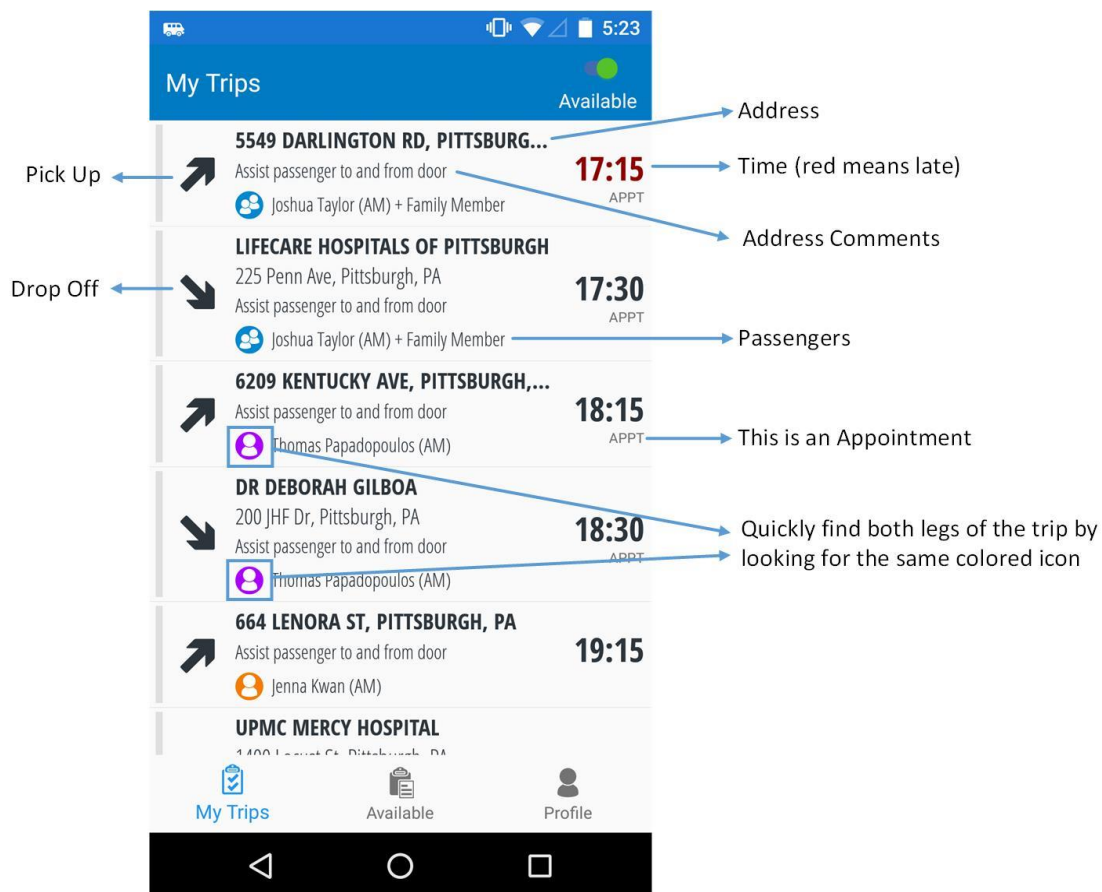


Figure 11: My Trips screen layout.

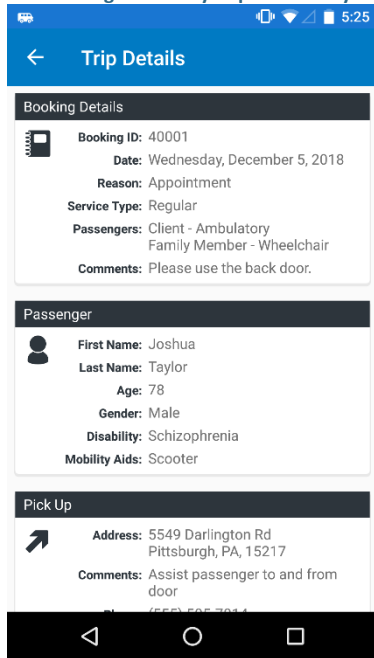


Figure 12: Viewing trip details.

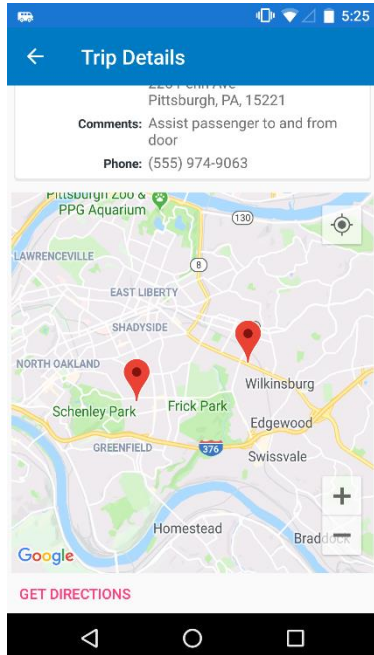


Figure 13: The map at the bottom of the trip details screen.

Generally, you will begin by viewing your list of work on the “My Trips” screen. The trips are sorted by time to assist you in prioritizing earlier trips first. If you need to view more details about the trip, tap on either of its pick up or drop off legs and select “Show Details” (Figure 12).

The Trip Details screen includes the following information:

- General information about the booking, such as the reason for the booking, which passengers need to be picked up, space information, general comments, etc.
- Information about the passenger who booked the trip
- Pick up and drop off details including the address, comments, and the phone number that can be used to reach the passenger or location.
- The time that the passenger needs to be picked up or dropped off at.
 - **Scheduled:** the broker has scheduled the trip to be completed at this time. This is often a time window.
 - **Requested:** the original time requested by the passenger.
 - **Estimated:** The estimated time of the trip based on your current list of assigned trips.

A map is available at the bottom of the screen with both legs of the trip visible (Figure 13). You can press “Get Directions” to begin navigating to the pickup location of the trip.

PICKING UP THE PASSENGER

To start a trip, drive to its location. If you do not know how to get there, you can choose “Get Directions” to open the map application on your phone to guide you there.

If the trip broker has enabled “auto arrive” functionality, the trip will automatically be marked as “arrived” as long as you are stopped at the specified location and it is close to the time of the pick up or drop off. You can also arrive a trip manually by tapping on an item and choosing “Arrived at Location” (Figure 14). If you are not close enough to the designated location, you will be prevented from arriving the trip (Figure 15).

Once the trip has been marked as “arrived”, the app will begin a countdown timer for the passenger to show up for their trip. The bar on the left will be filled with a solid green if you are on time, or red if you are late. The corresponding drop off task for the trip will have its bar filled with a translucent green so that you can quickly identify which passengers’ trips have been started (Figure 16).

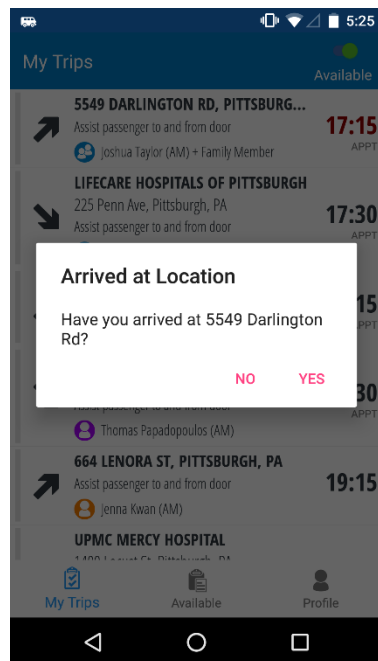


Figure 14: Arriving a trip manually.

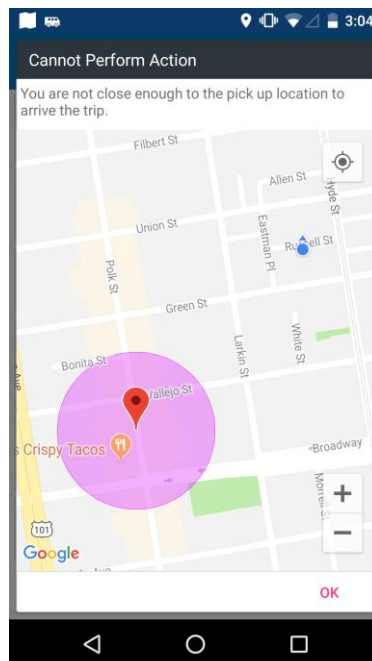


Figure 15: You must be within the vicinity of the location to mark it as arrived.

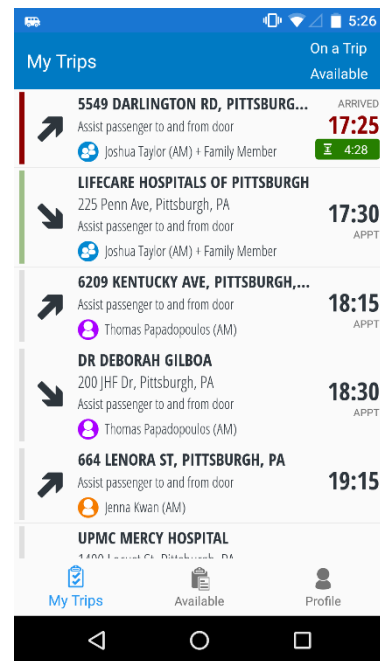
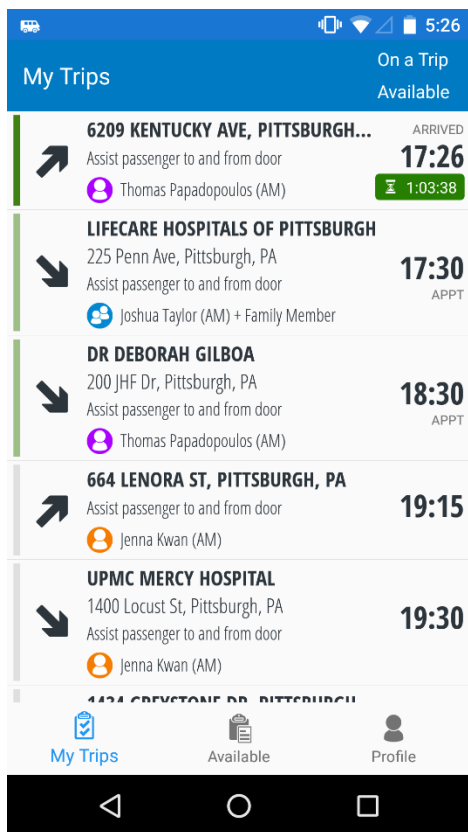


Figure 16: The “no show” countdown after arriving at a pick up location.

Once the passenger boards your vehicle, choose “Picked Up Passenger” to indicate that you have picked them up and will continue the trip.

CANCEL OR NO SHOW

- If the passenger refuses the trip after you have arrived, you can choose the “Cancel Trip” option to cancel the trip.
- If the passenger does not show up at all, you can choose the “No Show” option after waiting for the countdown timer to expire.



After the passenger has been picked up, the “pick up” task will be removed from your list. At this time, you can choose to either pick up another passenger who is along the way, or directly go drop off the passenger that you just picked up.

Figure 17 is an example of what the app looks like when multiple trips have been started. Any trips that have already been started can be easily seen due to the translucent green bar.

Figure 17: Multiple trips started.

DROPPING OFF THE PASSENGER

Once you have arrived at the passenger's destination, the drop off leg needs to be marked as "arrived". As with the pick up leg, this can be done either automatically or manually.

After you have unloaded the passenger, the "Complete Trip" option will be available (Figure 18). In some cases, you may be required to collect the passenger's signature (Figure 19). Make sure this is done before the passenger leaves. There is a setting on the Profile screen that can force the signature pad to always be shown in landscape. Disabling this setting will use the screen's current rotation.

After collecting the signature (if required), you will be shown a summary of the trip that was performed (Figure 20). You can tap on the pencil icons on this screen to do the following:

- Edit the odometer reading on either the pick up or drop off legs of the trip
- Recapture the passenger's signature again

Press the "Finish" button at the bottom of the screen to submit the trip data to the broker. The drop off leg will be removed from your list of work on the My Trips screen.

If you entered this page by accident and are not ready to complete the trip then you can use the "Cancel" button to go back.

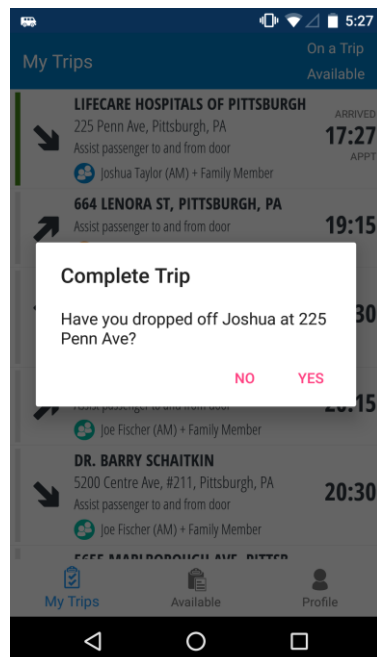


Figure 18: Confirmation dialog for completing a trip.



Figure 19: Collecting the passenger signature.

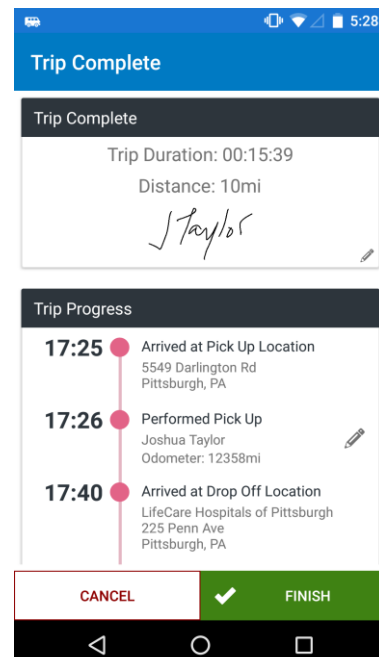


Figure 20: Summary of the trip.

SUMMARY

The following is a summary of the different actions that can be taken on a trip.

| Action | Description |
|----------------------------|--|
| Get Directions | This uses the map application on your phone to route you to the pick up or drop off location that you have selected. |
| Show Details | Select this option from either the pick up or drop off leg to view the full details of the trip. This includes information on the purpose of the trip, comments, passenger information, phone numbers, etc. |
| Arrived at Location | <p>This is available on both the pick up and drop off legs. As long as you are within the vicinity of the pick up/drop off location, you will be able to indicate that you have arrived at the designated trip location. This stamps a time and begins a countdown timer for how long you need to wait for the passenger for.</p> <p>If the broker has enabled the “auto arrive” feature, then you will not typically need to use this button to manually mark your trip as arrived.</p> |
| Picked Up Passenger | Use this option to indicate that you have picked up your passenger. This tracks your odometer, the time and the location that you picked the passenger up at. The “pick up” task will disappear from your “My Trips” page after this. |
| Complete Trip | This option is available after you have arrived to the drop off location, and is used to complete the last steps of the trip. You may be prompted to collect the passenger’s signature, if required. You are given the chance to review the summary of the trip, and edit odometer values before submitting the trip data to the broker. |
| Cancel Trip | This option is only available on the pick up leg of the trip. It is used to indicate that the passenger has chosen to cancel their trip when you tried to pick them up. |
| No Show | After you have arrived at the pick up location, a timer will begin to countdown. Once the timer expires, you can use this option to indicate that the passenger did not show up for their trip. |

Figure 21 on the next page illustrates the general workflow of performing trips from the “My Trips” page.

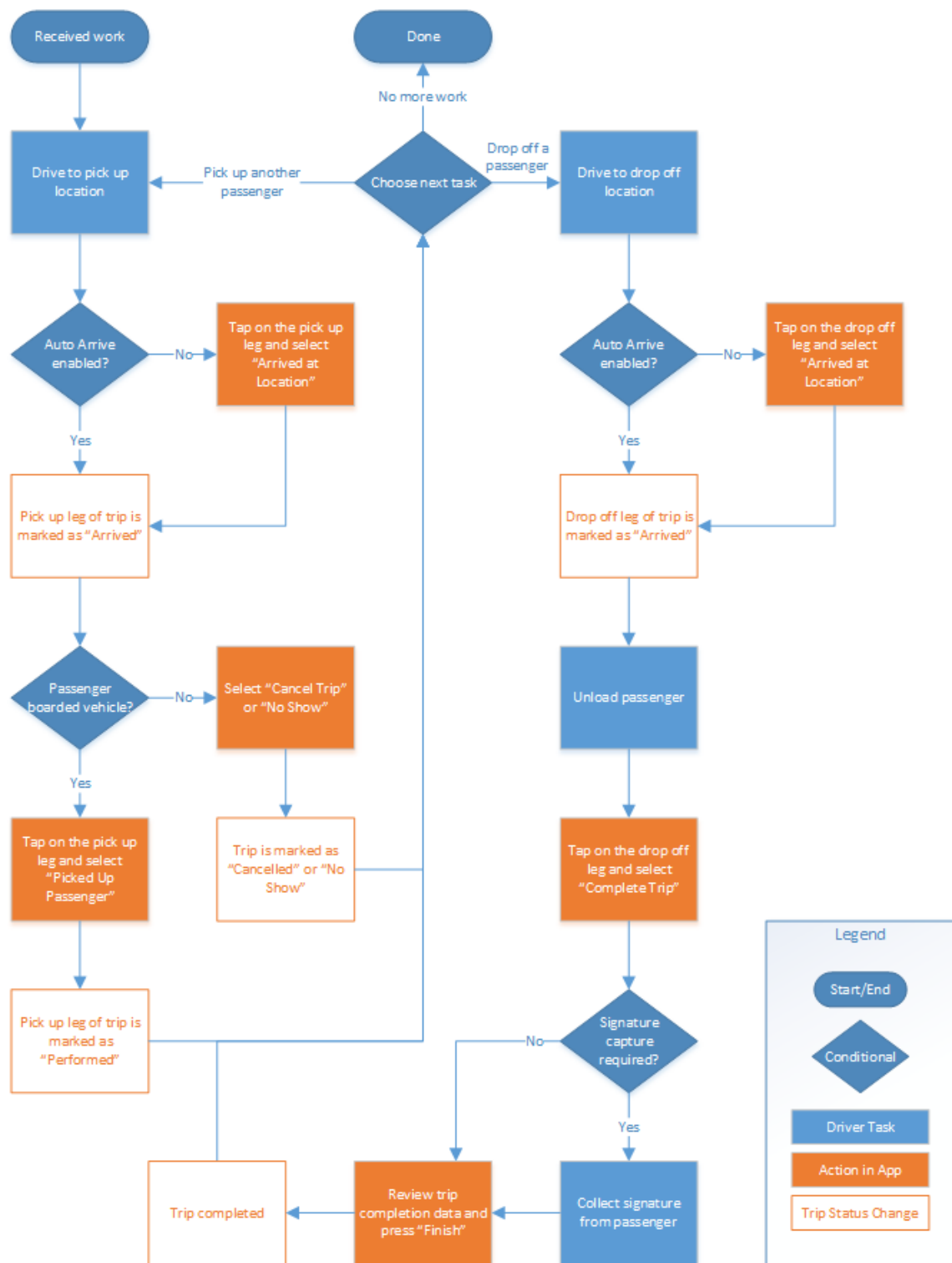


Figure 21: Workflow on the "My Trips" screen.

SIGNING UP FOR TRIPS

Any trip that has not been assigned to a driver will show up on the “Available Trips” screen, and can be reviewed and accepted by the driver as they see fit. It will depend on your agency whether this is applicable to your process or if all trips need to be scheduled by a dispatcher.

The trips that appear on the “Available Trips” screen are sorted by time to help prioritize the trips that are coming up soon. Unlike on the “My Trips” page, each item in this list represents a single trip.

Refer to Figure 22 for a quick guide of the information that is shown on the screen.

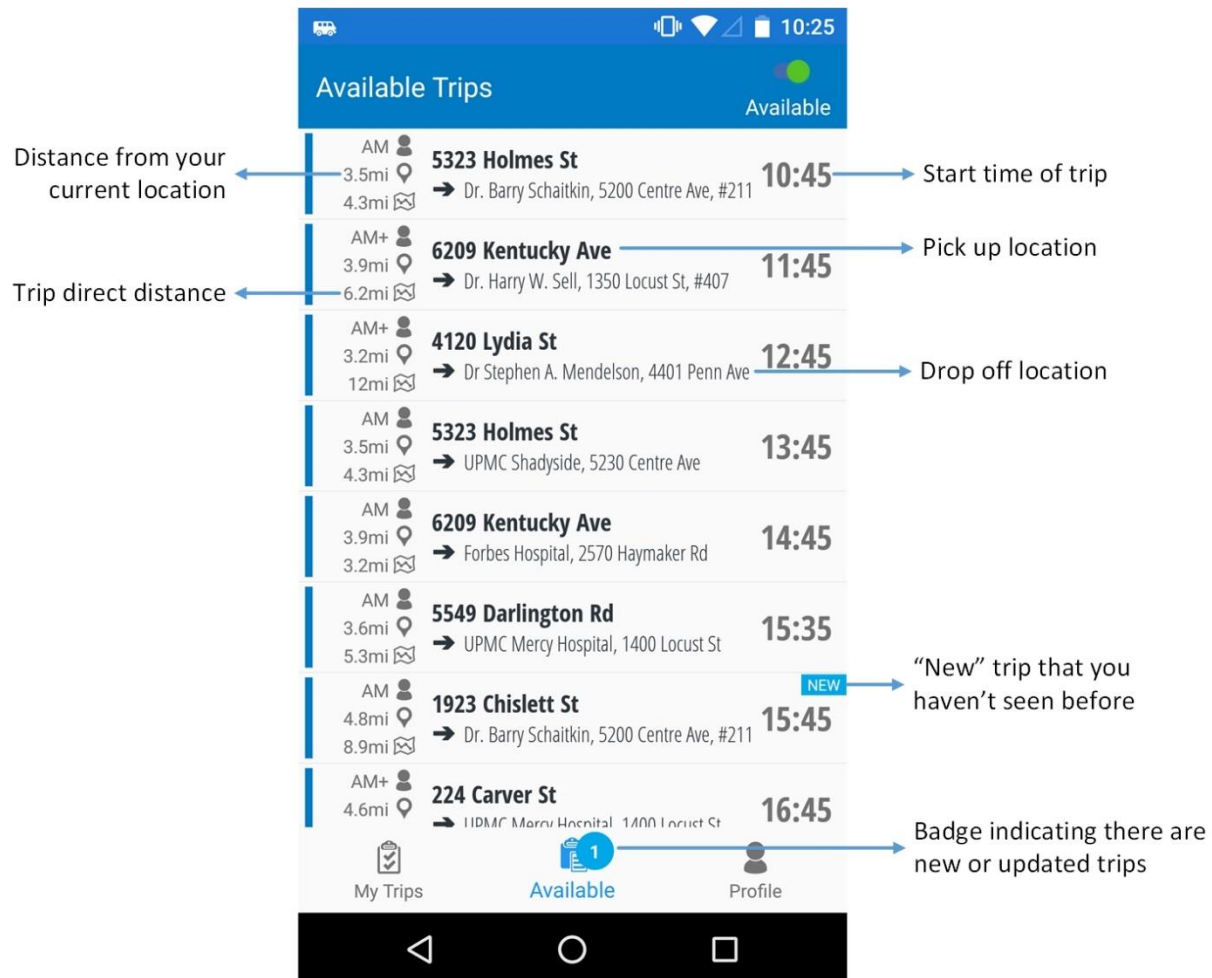


Figure 22: “Available Trips” screen.

On the left side of each trip, three different pieces of information are shown:

- **Space Type:** the space requirements for the trip. If there is more than one passenger, you will see a “+” sign.
- **Distance from your current location:** the distance between your current location and the pick up location of the trip.
- **Trip Direct Distance:** the direct distance of the trip from the pick up location to the drop off location.

On the right side of each trip is the time that the passenger needs to be picked up at.

At the center of each item are the pick up and drop off locations. For brevity, if the location has a site name, only the site name will be shown.

Tap on a trip to view additional information (Figure 23):

- General information about the booking, such as the reason for the booking, which passengers need to be picked up, space information, general comments, etc.
- Pick up and drop off details including the address, comments, and the phone number that can be used to reach the passenger or location.
- The time that the passenger needs to be picked up or dropped off at.
 - **Scheduled:** the broker has scheduled the trip to be completed at this time. This is often a time window.
 - **Requested:** the original time requested by the passenger.
 - **Estimated:** The estimated time of the trip based on your current list of assigned trips.

Note that you will not be able to view the details of the passenger who booked the trip until you accept the trip.

You can accept the trip and have it added to your own list of trips by pressing the “Accept Trip” button at the bottom. The trip will be removed from the “Available Trips” page from all drivers once it has been assigned. You will not be able to remove a trip once you have accepted it.

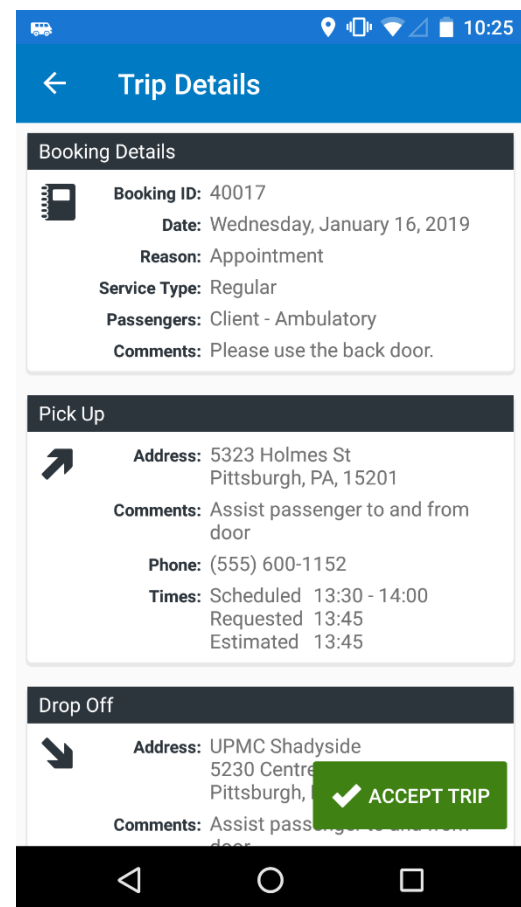


Figure 23: Trip details for an available trip.

CHANGE YOUR PASSWORD

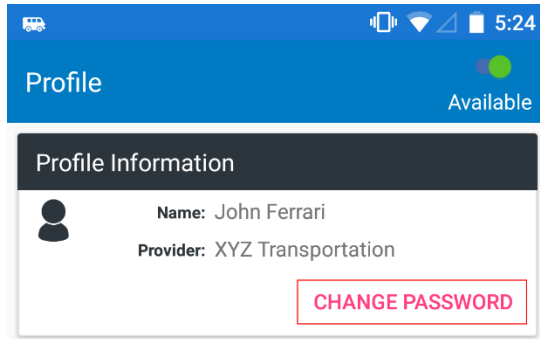


Figure 24: The "Change Password" button on the profile screen.

If you need to change your password, you can do so from the Profile screen (Figure 24). You will be asked to enter your current password first to help prevent unauthorized changes.

Please note the password requirements that have been set up by the broker.

CHANGE VEHICLES

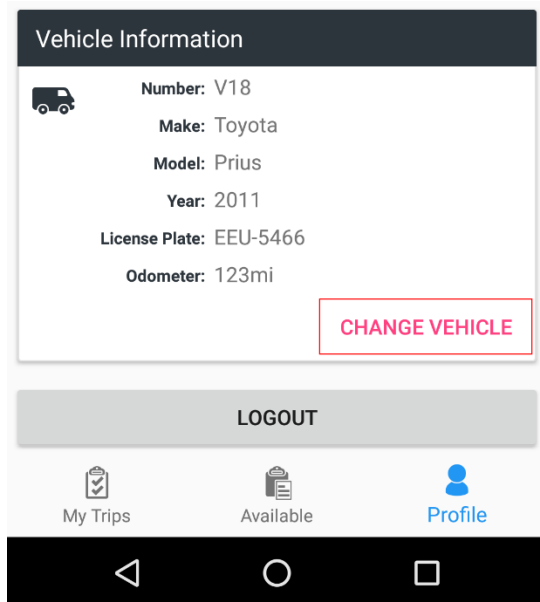


Figure 25: The "Change Vehicle" button on the profile screen can be used to specify that you are in another vehicle.

When you first log in, you are able to select the vehicle that you are using for the day. If you selected the wrong vehicle or need to change vehicles halfway through the day, you can do this through the button near the bottom of profile screen (Figure 25).

You can also use this dialog to update your current odometer. Note that as long as your status remains as "available", the app will automatically increment your odometer based on GPS values. Updating your odometer through your profile is not something that you should normally need to do.

DRIVER STATUS

The driver's status is automatically set to "available" after logging into the app (Figure 26). Being "available" means that the driver is available to perform work and/or accept new work. During this time, the driver's GPS location is automatically reported back to the broker and provider.



Figure 26: Status is set to "Available".

If the driver is taking a break, they can switch their status to "unavailable" (Figure 27), which will prevent GPS information from being sent. Becoming "unavailable" will also prompt for the vehicle's odometer to be updated again the next time the driver becomes "available".

The actions that can be taken by the driver while they are "unavailable" will be limited. For example, they will not be able to sign up for any available trips, and cannot start a new trip. The driver also cannot toggle their status to "unavailable" while they are on a trip (Figure 28). The Android notification icon will not appear when "unavailable".



Figure 27: Status is set to "Unavailable".



Figure 28: Cannot change status to "unavailable" while on a trip.

The app requires access to the GPS location of the driver in order to operate. If GPS becomes unavailable at any time, the driver's status will automatically change to "unavailable" (Figure 29).



Figure 29: Status is automatically switched to "Unavailable" when GPS is not available.

The app requires the phone to have data coverage in order to receive work and submit trip completion data. Drivers need to keep their data enabled while running the app. If the phone loses coverage (Figure 30), the driver will still be able to perform their tasks but will not be able to receive or sign up for new work. Any trip performance data collected while the phone was out of coverage will be stored and sent once the phone is back in coverage.



Figure 30: No internet connection.

LOG OUT

As the app contains protected health information of the passengers, it is advised for drivers to log out at the end of their shift so that the data will not be compromised if anyone else accesses the phone.

To log out, go to the “Profile” screen and press the “Logout” button at the bottom (Figure 31). You will be brought back to the “Log In” screen. Android users will also no longer see the app’s icon in their notification tray.

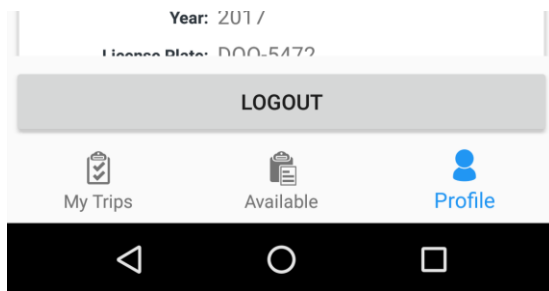


Figure 31: The logout button on the Profile screen.