



Service Management Portal Facility User Manual

Version 1.0

Last Update 12/2013

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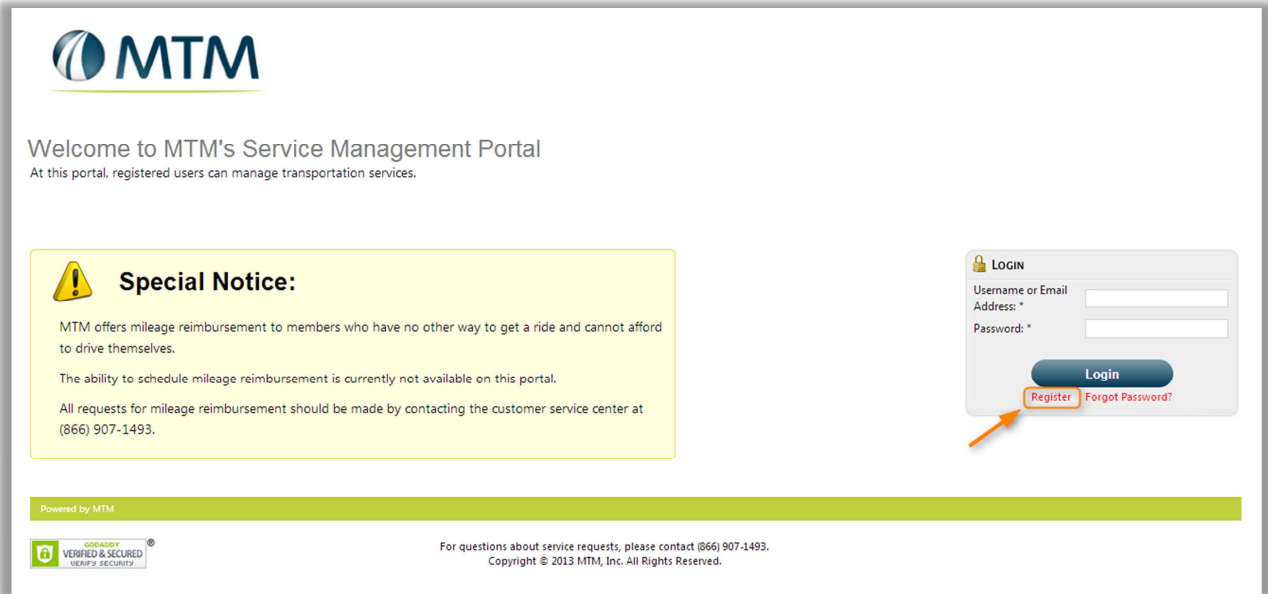
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Account Registration

This section explains how to register for account access. If you already have an active user account, you can skip to the next section; Logging In.

The user can register for account access by clicking the *Register* link as shown in figure 1 below.

Figure 1



The screenshot shows the MTM Service Management Portal. At the top left is the MTM logo. Below it, the text reads "Welcome to MTM's Service Management Portal" and "At this portal, registered users can manage transportation services." On the left, a yellow box titled "Special Notice:" contains information about mileage reimbursement. On the right, there is a login section with fields for "Username or Email Address" and "Password", a "Login" button, and links for "Register" and "Forgot Password?". An orange arrow points to the "Register" link. At the bottom, there is a "Powered by MTM" banner, a "GODADDY VERIFIED & SECURED" logo, and contact information for service requests.

MTM

Welcome to MTM's Service Management Portal
At this portal, registered users can manage transportation services.

Special Notice:

MTM offers mileage reimbursement to members who have no other way to get a ride and cannot afford to drive themselves.

The ability to schedule mileage reimbursement is currently not available on this portal.

All requests for mileage reimbursement should be made by contacting the customer service center at (866) 907-1493.

LOGIN

Username or Email Address: *
Password: *

Login

[Register](#) [Forgot Password?](#)

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VERISIGN SECURITY

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After clicking the register link, the user will identify that they are registering a medical facility account for access as shown in figure 2 below.

Figure 2



The image shows a web registration form for MTM. At the top left is the MTM logo. To its right, the word "Registration" is displayed. Below the logo, the heading "Account Type" is followed by the question "What type of account are you registering for access?". There are three radio button options: "Medical Facility" (which is selected and highlighted with an orange box and an orange arrow), "Member", and "Transportation Provider". At the bottom of the form area, there are two buttons: "Cancel" on the left and "Next" on the right. A green bar at the bottom of the form contains the text "Powered by MTM" on the left, a "GODADDY.COM VERIFIED & SECURED" logo in the center, and contact information on the right: "For questions about service requests, please contact (866) 907-1493. Copyright © 2013 MTM, Inc. All Rights Reserved."

After selecting the medical facility account type, the user will click the *Next* button to proceed to the next step in the registration process.

The next step in the registration process asks the user to provide the following information:

- Name and location information about the facility where the user works
- Contact information for the user registering an account
- User information
- Answers to challenge questions to use in the event of a lost password

This is shown in figure 3 below.

Figure 3



The registration form is titled "Registration" and features the MTM logo. It is divided into four main sections: Facility Information, Contact Information, User Information, and Challenge Questions. Each section contains several input fields and a "NOTE" box with specific requirements. At the bottom, there are three buttons: "Cancel", "Back", and "Complete Registration".

Facility Information

Medical Facility Name:
Street Address:
Suite/Floor/Bldg:
City:
State:
Zip Code:
Phone Number:

Contact Information

Please enter your contact information in the following fields.

First Name:
Last Name:
Phone Number:
Email Address:
Confirm Email Address:

User Information

Please enter the user information in the following fields. This information will be used to login to the system after your account has been authorized.

User Name: **NOTE: User Name must contain 3-10 letters and numbers.**
Password: **NOTE: Password must contain 8-20 characters, 1 uppercase and 1 number.**
Confirm Password:

Challenge Questions

Please enter the answer to each challenge question in the following fields. This information will be used in the event you forget your password.

What is the color of your first car? **NOTE: Answers to challenge questions are not case sensitive.**
What city were you born in?
What is your mother's maiden name?

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After completing all fields on this screen, the user will click the *Complete Registration* button to complete the registration process.

After successfully registering for a user account, the user will be re-directed back to the *Login* screen where they will be shown a success message indicating that they have successfully registered for an account. The user will not be able to log in using their account until it has been approved by MTM. A successful account registration is shown in figure 4 below.

Figure 4

The screenshot displays the MTM Service Management Portal. At the top left is the MTM logo. Below it, the text reads "Welcome to MTM's Service Management Portal" and "At this portal, registered users can manage transportation services." A green success banner states: "Success: Your account has been successfully created. Your account must be verified before you can login. You will receive an email notifying you when your account has been approved." To the left of the login form is a yellow "Special Notice" box with a warning icon. The notice explains that MTM offers mileage reimbursement to members who have no other way to get a ride and cannot afford to drive themselves, but that the ability to schedule reimbursement is currently not available on this portal. It also provides a contact number for customer service: (866) 907-1493. On the right is a login form with fields for "Username or Email Address" and "Password", a "Login" button, and links for "Register" and "Forgot Password?". At the bottom, there is a "Powered by MTM" bar, a "GOODADDY VERIFIED & SECURED" logo, and a footer with contact information and copyright notice.

MTM

Welcome to MTM's Service Management Portal
At this portal, registered users can manage transportation services.

Success
Your account has been successfully created. Your account must be verified before you can login. You will receive an email notifying you when your account has been approved.

Special Notice:

MTM offers mileage reimbursement to members who have no other way to get a ride and cannot afford to drive themselves.

The ability to schedule mileage reimbursement is currently not available on this portal.

All requests for mileage reimbursement should be made by contacting the customer service center at (866) 907-1493.

LOGIN

Username or Email Address: *
Password: *

Login

[Register](#) [Forgot Password?](#)

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After the account has been approved by MTM, the user will receive an e-mail at the e-mail address they registered with indicating their account has been approved and they can now begin using it. An account approval e-mail is shown in figure 5 below.

Figure 5

The screenshot shows an email message from MTM. It begins with the MTM logo. The main heading reads "Your MTM Service Management Portal account has been approved." The body of the email says "Hello [redacted], your account at MTM's Service Management Portal has been approved. You can begin to request transportation services." There is a blue hyperlink "Click here to login!". The email concludes with "Your User Name is [redacted]".

MTM

Your MTM Service Management Portal account has been approved.

Hello [redacted], your account at MTM's Service Management Portal has been approved.

You can begin to request transportation services.

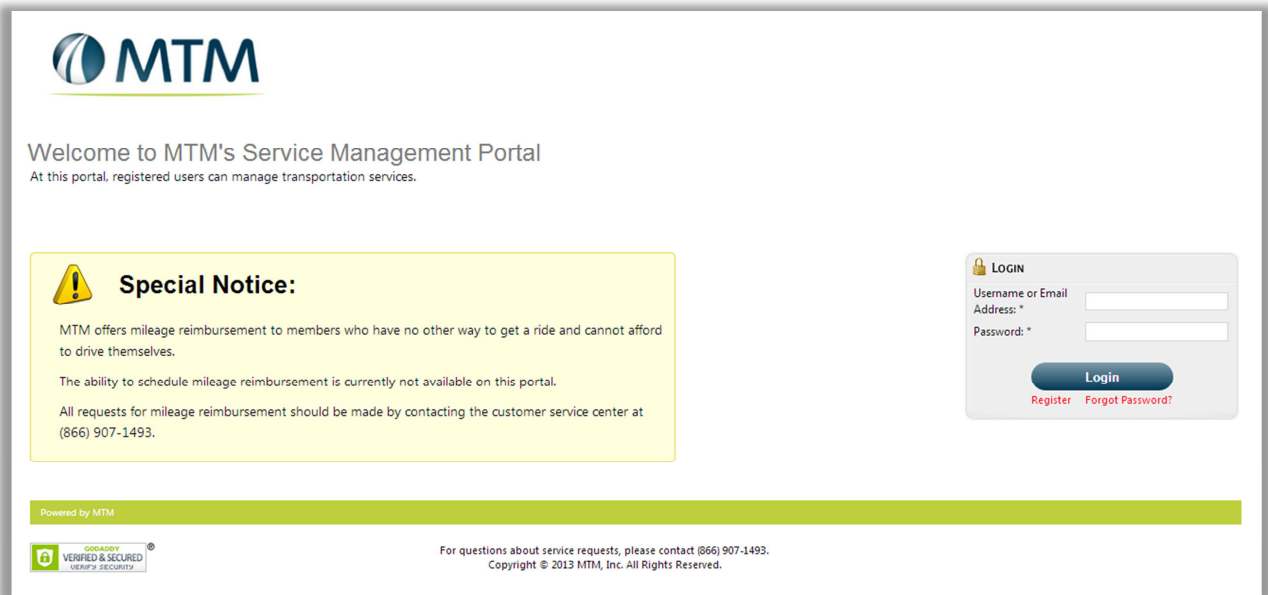
[Click here to login!](#)

Your User Name is [redacted]

Logging In

Once the user has registered for an account and has been approved, they will be able to log in to manage transportation services on behalf of the members who live at or attend their facility by entering their username or email address and password into the *Login* screen as seen in figure 6 below.

Figure 6



The screenshot shows the MTM Service Management Portal login page. At the top left is the MTM logo. Below it, the text reads "Welcome to MTM's Service Management Portal" and "At this portal, registered users can manage transportation services." On the left side, there is a yellow box with a warning icon and the heading "Special Notice:". The notice states that MTM offers mileage reimbursement to members who have no other way to get a ride and cannot afford to drive themselves, but that the ability to schedule mileage reimbursement is currently not available on this portal. It also mentions that all requests for mileage reimbursement should be made by contacting the customer service center at (866) 907-1493. On the right side, there is a login form with the heading "LOGIN" and a lock icon. The form includes fields for "Username or Email Address: *" and "Password: *", a "Login" button, and links for "Register" and "Forgot Password?". At the bottom, there is a green bar with the text "Powered by MTM" and a "GODADDY VERIFIED & SECURED" logo. To the right of the logo, it says "For questions about service requests, please contact (866) 907-1493. Copyright © 2013 MTM, Inc. All Rights Reserved."

After entering their username or e-mail address and password, the user will click the *Login* button to log in to the service management portal.

Searching For A Member

After logging in to the service management portal, the user will be navigated to the *Member Search* screen as shown in figure 7 below. This screen will also be accessible by clicking the *Search* tab at the top of any page.

Figure 7

The screenshot shows the MTM Member Search interface. At the top left is the MTM logo. To its right is a 'CLICK HERE FOR LIVE HELP' button. Further right is a 'LOGIN' section showing 'Logged In:' and a 'Log Out' link. Below this is a navigation bar with 'Search' and 'Help' tabs. The main content area contains a paragraph explaining the portal's purpose and a form with three search criteria: 'ForwardHealth ID Number', 'Last Name', and 'Date Of Birth' (with a calendar icon). A 'SEARCH' button is located to the right of the form. The footer includes 'Powered by MTM', a 'GOADDY.COM VERIFIED & SECURED' badge, and contact information.

This screen allows the user to search for the member whose transportation services they wish to manage.

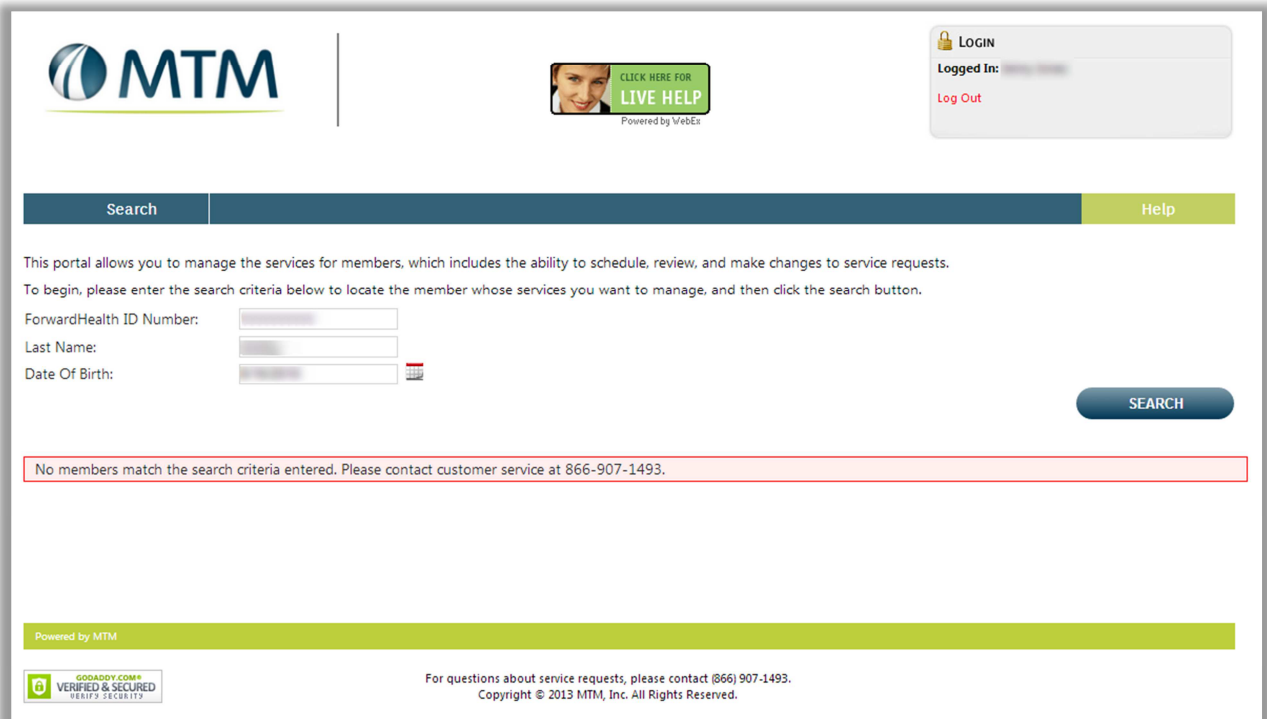
To search for a member, the following three fields must be completed:

- ForwardHealth ID Number
- Last Name
- Date Of Birth (D.O.B.)

After entering the search criteria into the three fields listed above, the user will click the *Search* button.

If no members are found that match the search criteria entered, an error message is displayed that indicates there were no matching members found. This is shown in Figure 8 below.

Figure 8



The screenshot displays the MTM member search portal. At the top left is the MTM logo. To its right is a 'CLICK HERE FOR LIVE HELP' button with a woman's face icon and 'Powered by WebEx' text. Further right is a login box with 'LOGIN', 'Logged In: [redacted]', and 'Log Out' links. Below these is a navigation bar with 'Search' and 'Help' tabs. The main content area contains a search form with the following text: 'This portal allows you to manage the services for members, which includes the ability to schedule, review, and make changes to service requests. To begin, please enter the search criteria below to locate the member whose services you want to manage, and then click the search button.' The form has three input fields: 'ForwardHealth ID Number:', 'Last Name:', and 'Date Of Birth:'. A 'SEARCH' button is located to the right of the 'Date Of Birth' field. Below the form, a red-bordered box contains the message: 'No members match the search criteria entered. Please contact customer service at 866-907-1493.' At the bottom, there is a 'Powered by MTM' bar, a 'GOADADDY.COM VERIFIED & SECURED' badge, and a footer with contact information and copyright notice.

MTM

CLICK HERE FOR
LIVE HELP
Powered by WebEx

LOGIN
Logged In: [redacted]
Log Out

Search Help

This portal allows you to manage the services for members, which includes the ability to schedule, review, and make changes to service requests.
To begin, please enter the search criteria below to locate the member whose services you want to manage, and then click the search button.

ForwardHealth ID Number:

Last Name:

Date Of Birth:

SEARCH

No members match the search criteria entered. Please contact customer service at 866-907-1493.

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If a member is found that matches the search criteria, their information will be displayed on the screen to confirm it is the correct member as shown in Figure 9 below.

Figure 9

If the correct member was located, the user will click on the member's name to access that member's information and manage their services.

Review Scheduled Services

After the user has located the member for which they wish to manage transportation services, they will be navigated to the *Scheduled Services* screen as shown in Figure 10 below. This screen will also be accessible by clicking the *Review* tab at the top of any page.

Figure 10

MTM

CLICK HERE FOR LIVE HELP
Powered by WebEx

LOGIN
Logged In: [User Name]
Log Out

Search Review Schedule Help

Member: [Member Name] [View Historical Services](#)

Scheduled Services

This list shows all non-recurring services that are scheduled in MTM's system.

Request Number	Date/Time	Pick-Up Address	Destination Address	Service Type	Status
C000000543	9/5/2013 1:00 AM	RACINE, WI 53403	Madison, WI 53705	Transportation	Confirmed

Showing 1 to 1 of 1 entries [Previous](#) [Next](#)

Recurring Services

This list shows all recurring services scheduled in MTM's system.

Request Number	Repeat	Pick-Up Address	Destination Address	Service Type	Status
There are no recurring services scheduled.					

Showing 0 to 0 of 0 entries [Previous](#) [Next](#)

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VERIFY SECURITY

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This screen allows the user to review existing service requests for the member. The service requests shown on this screen are service requests from the current day and into the future. All historical service requests are shown on the *Historical Services* screen which is available as a link from this page.

Within the list of scheduled services, there are multiple sorting options which are available by clicking the title of the column by which the user chooses to sort. Only columns with arrows next to their titles are sortable. This list will display up to 10 service requests in a single page, if more than 10 service requests are present, the user will click the *Next* or *Previous* buttons to navigate through the pages accordingly.

Clicking the *Search* tab at the top of this screen will navigate the user to the *Member Search* page.

Clicking the *Review* tab at the top of this screen will refresh the current page.

Clicking the *Schedule* tab at the top of this screen will navigate the user to the *Schedule A Service* page.

Clicking on the request number link associated with a service will navigate the user to the *Service Details* page for the corresponding service.

Review Historical Services

To review services that have occurred in the past, the user will click on the *View Historical Services* link from the *Scheduled Services* screen. After the user has clicked the link, they will be navigated to the *Historical Services* screen as shown in Figure 11 below.

Figure 11

The screenshot displays the MTM Historical Services interface. At the top, there is a navigation bar with 'Search', 'Review', 'Schedule', and 'Help' tabs. Below this, a 'Member:' field is visible. The main heading is 'Historical Services', with a subtext: 'This list shows all services that have occurred in the past.' Below the heading is a table of service requests.

Request Number	Date/Time	Pick-Up Address	Destination Address	Service Type	Status
C000000487	8/12/2013 1:00 AM	racine, WI 53403	Madison, WI 53705	Transportation	Confirmed
C000000488	8/13/2013 1:00 AM	RACINE, WI 53403	Madison, WI 53705	Transportation	Confirmed
		Madison, WI 53705	Madison, WI 53403		
		Madison, WI 53403	RACINE, WI 53403		
WWSA1300236	8/13/2013 1:00 AM	RACINE, WI 53403-3236	MADISON, WI 53705-5414	Transportation	Cancelled
WWSA1300237	8/13/2013 1:00 AM	MADISON, WI 53705-5414	RACINE, WI 53403	Transportation	Completed

Showing 1 to 10 of 11 entries

Previous Next

Back

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This screen allows the user to review historical service requests for the member. The service requests shown on this screen are those that occurred in the past.

Within the list of historical services, there are multiple sorting options which are available by clicking the title of the column by which the user chooses to sort. Only columns with arrows next to their titles are sortable. This list will display up to 10 service requests in a single page, if more than 10 service requests are present, the user will click the *Next* or *Previous* buttons to navigate through the pages accordingly.

Clicking the *Search* tab at the top of this screen will navigate the user to the *Member Search* page.

Clicking the *Review* tab at the top of this screen will navigate the user to the *Scheduled Services* page.

Clicking the *Schedule* tab at the top of this screen will navigate the user to the *Schedule A Service* page.

Clicking on the request number link associated with a service will navigate the user to the *Service Details* page for the corresponding service.

Schedule A Service / Edit

After clicking the *Schedule* tab from any other page, the user will be navigated to the *Schedule A Service* page.

Figure 12



LOGIN
Logged In:
Log Out

SearchReviewHelp

Member:

123
Enter Service DetailsReview Your ServiceConfirmation

Appointment Information

Leg 1

Trip Reason: Choose One

Appointment Date:
(e.g. 10/01/2013)

Appointment Time:
(e.g. 10:30 AM)

Pick-up Information:

Recent Locations

Name: Address:

Apt./Suite: City: State: Montana Zip Code:

Destination Information:

Recent Locations

Name: Address:

Apt./Suite: City: State: Montana Zip Code:

Add Return Leg

Add Appointment

This service does not repeat: [Change](#)

Additional Passenger Information

Add Passenger

Special Rider Needs

☐ Pregnant

☐ Uses an ambulatory mobility aide (e.g. crutches, walker, cane, etc.) or a wheelchair that is collapsible and can transfer to a car seat.

☐ Requires a wheelchair lift equipped vehicle (cannot transfer to the seat of a vehicle or wheelchair is non-collapsible)

Instructions

Enter any special instructions below (e.g. Please honk the horn upon arrival.)

Special Instructions

Cancel

Next

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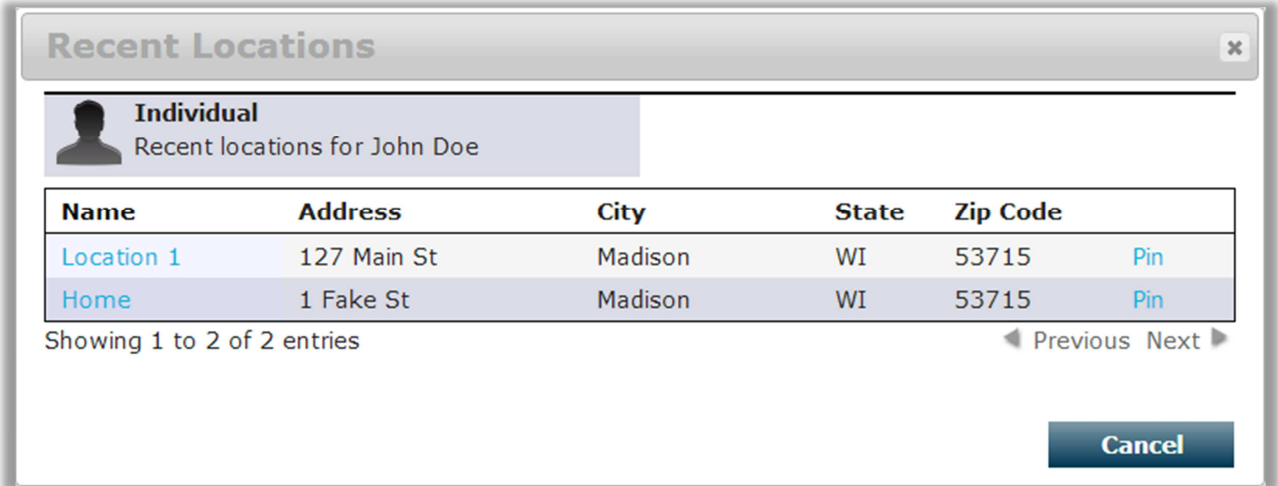
 VERIFIED & SECURED
VERIFY SECURITY

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This screen allows the user to enter all of the details of their service request.

One notable feature of this screen is that all locations are saved as they are entered. Saving the locations prevents the user from being required to enter the same information each time they need service to the same location. Clicking the *Recent Locations* link above each address block will present the user with a window of their recently visited locations as seen in figure 13 below.

Figure 13



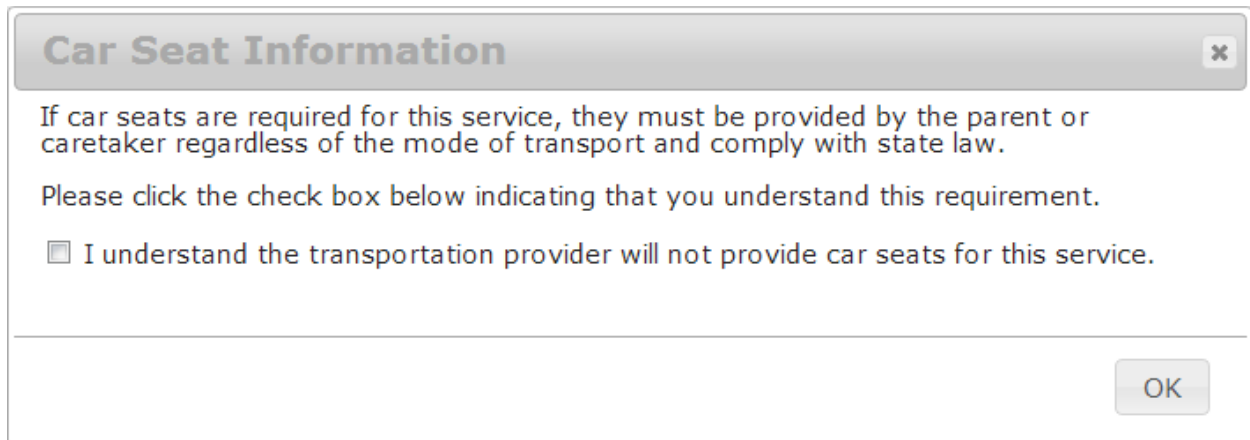
The *Recent Locations* window will show the 10 most recently used locations. The user also has the ability to “pin” an address to the list. Pinning an address to the list will prevent it from being removed in the event it is no longer one of the 10 most recently used locations.

Clicking the name of a location from the *Recent Locations* window will close the window and insert the address information into the corresponding address block.

During the service entry process, various checks are performed on the data being entered to ensure accuracy. At times, different policy reminders will also be shown to ensure conformity.

One example is the car seat policy (shown below in figure 14); this is shown anytime the service being scheduled is for a member that is 8 years old or younger.

Figure 14



Car Seat Information [X]

If car seats are required for this service, they must be provided by the parent or caretaker regardless of the mode of transport and comply with state law.

Please click the check box below indicating that you understand this requirement.

☐ I understand the transportation provider will not provide car seats for this service.

OK

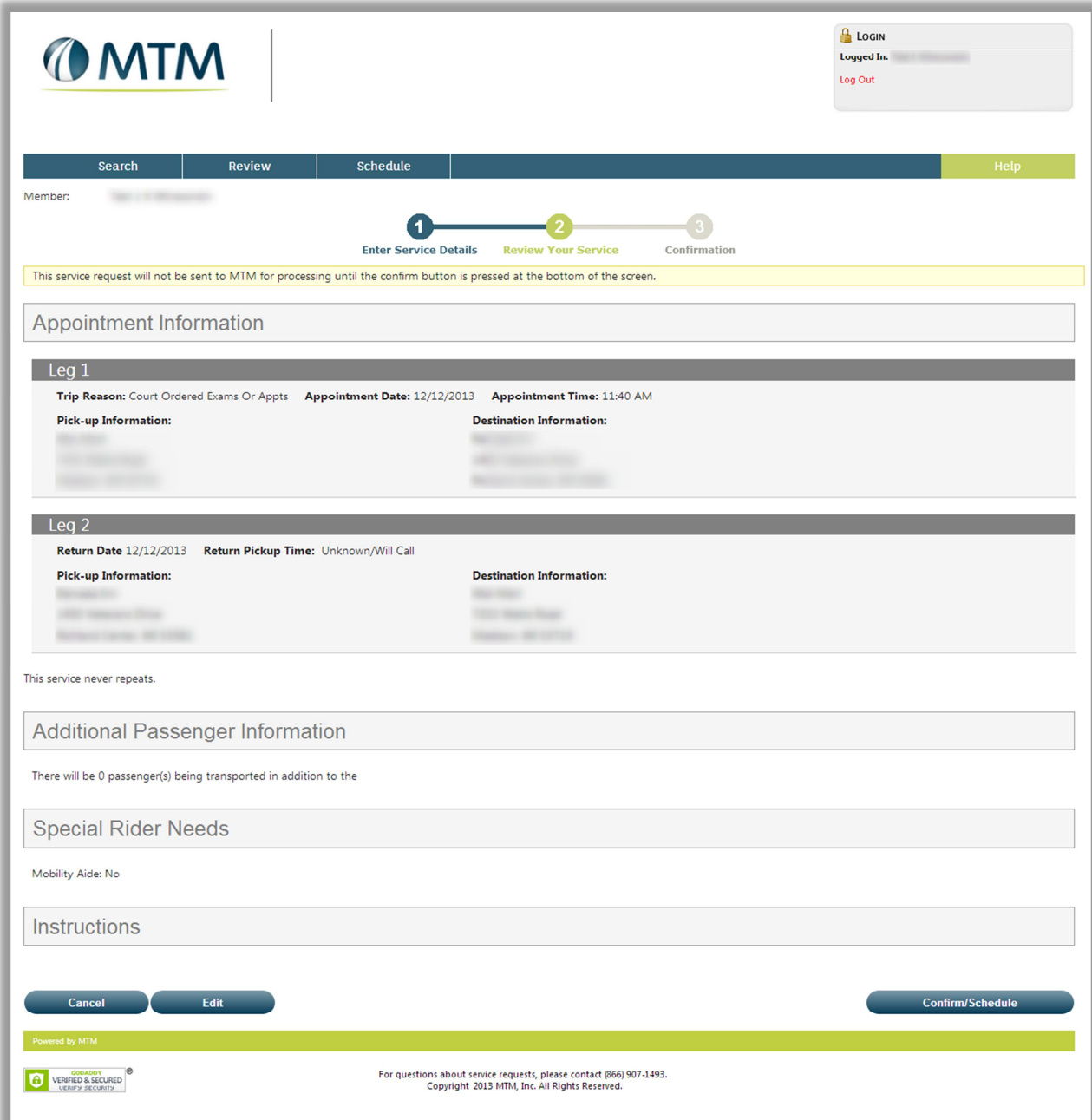
After the user has entered all details of their service request, the user will click the *Next* button to be navigated to the *Confirmation* screen.

At any time, the user can click the *Cancel* button at the bottom of the screen to cancel their service request entry; doing so will also navigate the user back to the *Scheduled Services* screen.

Confirmation Screen

After clicking the *Next* button from the *Schedule A Service* screen, the user will be navigated to the *Confirmation* screen as shown below in figure 15. This screen gives the user the ability to review all information they just entered, prior to scheduling the service with MTM. It is important to note that until the user clicks the *Confirm/Schedule* button at the bottom of the screen, this request for service will not be sent to MTM.

Figure 15



The screenshot displays the MTM Confirmation screen. At the top left is the MTM logo. On the top right, there is a 'LOGIN' section with 'Logged In:' and a 'Log Out' link. Below this is a navigation bar with 'Search', 'Review', 'Schedule', and 'Help' tabs. A progress indicator shows three steps: '1 Enter Service Details', '2 Review Your Service' (highlighted), and '3 Confirmation'. A yellow warning box states: 'This service request will not be sent to MTM for processing until the confirm button is pressed at the bottom of the screen.' The main content area is divided into sections: 'Appointment Information' (Leg 1 and Leg 2), 'Additional Passenger Information', 'Special Rider Needs', and 'Instructions'. At the bottom, there are 'Cancel', 'Edit', and 'Confirm/Schedule' buttons. A footer bar includes 'Powered by MTM', a 'GOADBY' logo, and contact information.

MTM

LOGIN
Logged In: [User Name]
Log Out

Search Review Schedule Help

Member: [Member Name]

1 Enter Service Details 2 Review Your Service 3 Confirmation

This service request will not be sent to MTM for processing until the confirm button is pressed at the bottom of the screen.

Appointment Information

Leg 1
Trip Reason: Court Ordered Exams Or Appts Appointment Date: 12/12/2013 Appointment Time: 11:40 AM
Pick-up Information: [Address]
Destination Information: [Address]

Leg 2
Return Date 12/12/2013 Return Pickup Time: Unknown/Will Call
Pick-up Information: [Address]
Destination Information: [Address]

This service never repeats.

Additional Passenger Information
There will be 0 passenger(s) being transported in addition to the

Special Rider Needs
Mobility Aide: No

Instructions

Cancel Edit Confirm/Schedule

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GOADBY
VERIFIED & SECURED
every security

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At any time, the user can click the *Cancel* button at the bottom of the screen to cancel their service request entry; doing so will also navigate the user back to the *Scheduled Services* screen.

If a correction is needed, the user can click the *Edit* button which will navigate them back to the *Schedule A Service* screen.

If all information is correct, the user will click the *Confirm/Schedule* button to complete their service request; this will also navigate the user to the *Service Details* page.

Service Details Screen

After scheduling a service or clicking on the request number from the *Scheduled Services* screen, the user is navigated to the *Service Details* screen.

This screen allows the user to review all details of a service that has already been scheduled as shown in figure 16 below.

The service tracker on this screen allows the user to keep up with the status of a service; whether it has just been received by MTM, assigned to a transportation provider, or has already occurred.

At any time, the user can click the *Cancel* button at the bottom of the screen to cancel the service request they are currently viewing; doing so will also navigate the user back to the *Scheduled Services* screen.

If there are any changes that need to be made to the service that is currently being viewed, the user can click the *Edit* button which will navigate them to the *Edit Service* screen outlined above.

Clicking the *Back to service list* button will navigate the user back to the *Scheduled Services* screen.

Figure 16



[LOGIN](#)
Logged In:
[Log Out](#)

[Search](#) | [Review](#) | [Schedule](#) | [Help](#)

Member: Request Number: **C000000634** Service Details: [Print](#) / [Email](#)

1

2

3

Enter Service Details | Review Your Service | Confirmation

Your service request has been received, your request number can be found above. You can return to this page at any time to follow the progress of this service request.

Appointment Information

Leg 1

Trip Reason: Court Ordered Exams Or Appts **Appointment Date:** 12/12/2013 **Appointment Time:** 11:40 AM

Pick-up Information: **Destination Information:**

Leg 2

Return Date: 12/12/2013 **Return Pickup Time:** Unknown/Will Call

Pick-up Information: **Destination Information:**

This service never repeats.

Additional Passenger Information

There will be 0 passenger(s) being transported in addition to the

Special Rider Needs

Pregnant: No
Mobility Aide: No

Instructions

Service Provider Information

Leg 1

Transportation Provider: Pending
Work Order Number:

Leg 2

Transportation Provider: Pending
Work Order Number:

Cancel

Edit

Back to service list

Powered by MTM



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