STARrides User Manual

URL: **www.starrides.ca**

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From the main screen, click on button "Launch Star Platform" which will open a new window with Log in capability.

Chapter 1: Getting Started, Logging on, Change/Lost Password

1.1 Getting Started:

Enter User ID and Password and click "Login"

1.1.1 To Change a Password:

Click on "Change Password" icon on the top right of the login screen

A new screen will open

Enter User ID

Enter Current Password

Enter New Password

Verify New Password

Click Submit and your password should be changed

1.1.2 To Reset a user password (Managers Only):

Select "Reset Password" from the main Dropdown Menu

Select the Member Type from the Dropdown Menu at the left of the page (client, volunteer, staff etc.)

Click Submit

Now Select Member from the Dropdown Menu

Click Submit

Tick the Reset Password box to confirm you want to reset the user's password, then enter YOUR own password in the password box.

Click Submit

The user password will now be reset to the default, which is the same as the username.

1.1.3 "Remember Me" Option:

Only use if you are on a private, single-use computer.

Keep in Mind:

- **While using the STARrides platform please ensure that after every change made to a page click "Submit" or "Update" before leaving the page rather than just exiting or clicking "Close." This will ensure that the information is properly updated and saved as you change it.**

- **The STARrides software will open a new window any time you are updating information, be it Membership Information, Ride Type etc. If you ever think you may have lost one of these windows, chances are it is just hiding underneath other open windows. Don't panic! The simplest way to get back to the previous window is to press Alt-Tab (on a PC)**

Keeps user logged in until the logoff button is clicked..

1.2 The Welcome Screen

The Welcome Screen contains several useful tools to make using the STARrides software easier. Beginning on the left you will see the STAR Logo and your agency's Logo, both with links back to their respective websites.

At the top of the screen is a personalized welcome message and a Dropdown menu which allows you to access various functions of the program.

The number of items you will see in the Dropdown menu will depend on your position at the agency, be it Volunteer, Staff, Supervisor, Manager etc., as there is a hierarchy of permissible actions depending on your status. See the Appendix for a full list of positions and their permissible actions with the STARrides software.

To the right of the centre Dropdown menu are a number of buttons that act as shortcuts, or links, to several helpful and common functions. Hovering over the button will reveal its name:

1.2.1 Search Button:
Used for member lookups. This shortcut allows you to look up a member quickly by name and see their membership data. Here you can also record incoming and outgoing calls, create a trip or other assistance requests, create notes and see which groups the client belongs to.

1.2.2 The Member Listing Button:

This gives you quick access to membership and volunteer listings and can be used to record contacts or quickly access membership information. To log a Volunteer contact, use the "Log" button at the right of the screen. To log a Member Contact, it is better to use the Member Lookup or Search button function rather than the Member Listing Button.

1.2.3 The Email Button:

This lets you send a bulk email to selected groups. Be sure to have included your client or volunteer's email addresses in their information for this function to work.

1.2.4 The "Finger" Button:

This allows you to create alerts and reminders, log contacts etc.

1.2.5 The Note Pad Button:

This function allows you to log Volunteer hours and miles for various other activities. Be aware that Volunteers may only log their own "Other Services" hours, while Staff, Supervisors and Managers may log hours for others.

1.2.6 The Calendar:

This button allows you to schedule volunteer and staff availability, indicate staff vacation times etc. Please Note: Volunteers may only update their own calendar, while Staff, Supervisors and Managers may update any members' calendar.

1.2.7 The Reports Button:

This opens a new window with access to a number of useful and important reports.

1.2.8 The Note Button:

This lets you view all of your own alerts.

Chapter 2: Ride Types, Clients, Volunteers & Destinations:

2.1 01 Add/Edit Ride Types

In some cases, this may be a shared data field, meaning other agencies in your region may be able to access and view the same ride types as you, e.g. Medical, Shopping, Socializing. Because of this if you change the name of an already existing ride type e.g. from "Shopping" to "Shopping at Park Royal," the ride type changes for everyone, not just you.

Check with your STARrides supervisor to see if this is the case for your agency.

Starting at the Dropdown menu, select option "01 Add/Edit Ride Types." This screen lets you organize and report on different ride types being used. Add ride types first before entering destinations as they will later be linked, saving you time. For example, trips to a medical centre (destination) will likely be medical appointments (type.)

2.1.1 To Add a Ride Type:

- Click on Dropdown Menu and select "Add/Edit Ride Types"
- Click Go
- Click On "Add New Ride Type" button at top left of the screen
- Enter short description of Ride Type in "Short Desc" box
- The "Description" information box can be the same as the short description if appropriate
- Add additional notes, if needed, in "Additional Information Writeup" box
- Once all Ride Type information is entered click on the Status box to indicate whether the ride is Active, Inactive or Deleted.
- Do not use Delete unless you know for certain the Ride Type is for your organization's use only. Otherwise you'll delete the option for everyone.
- Click "Update." It will then tell you that the record has successfully updated and you can then close the Message Type Box.
- New Ride Type will now appear on the list.
- You usually only need to add Ride Types at the beginning of the setup but you may want to add more later.
- You can edit Ride Types once they've been entered by clicking on the type, but beware the caveats about it being a shared table.

2.2 02 Adding/Edit Clients/Volunteers

Part A – Duplicate Check, Member Data, and Login ID

2.2.1 Adding a Member:

- Click on Dropdown Menu and select “Add/Edit Clients/Volunteers”
- On the far left select “Member Type” from the list of options
- Choose “City/Town” if appropriate
- Click “Submit” to filter the current list of members
- Click “Add a New Member” button on the far right hand side of the page
- *Optional steps for Duplicate Checking; skip if you know it’s a new client*
    - Enter Date of Birth (mm/dd/yyyy)
    - Enter Postal Code
    - Enter Phone Number Prefix (first three digits after the area code)
    - Click “Check” – this prompts the system to check for duplicates so that the same member isn’t entered twice
- Enter Member Type (in this case “Client”)
- Enter Member First Name
- Enter Member Last Name
- Login ID is not needed in the most CASES and can be left blank. It will be automatically generated by the system.
- Volunteers and Staff may need to have assigned User ID’s and Passwords
- Default User ID is: [Last Name][First Name Initial]
- Default Password is: The User ID
- Click Submit to Add Member

2.2.2 Entering Client Data:

- The TAB key helps you to move easily between fields in this menu.
- Enter Client Type
- Enter Status – Only staff members with Manager status or higher can approve the pending default status
- Client Number is optional and assigned by the agency if it wants it for cross-referencing purposes
- Date of Birth should transfer over to client data if the duplicate check was done properly. If not, enter as mm/dd/yyyy
- Enter Address – For example, enter address as: 175 E. Broadway and then #209 as the

Begin with the street address and then include the suite or apartment unit number otherwise the address will not map. **You may also use the “2nd” address field for the the apartment or unit number.**

suite so that it will map properly.

- Enter Municipalities consistently with the full name – i.e. "North Vancouver" should not be entered a second time as "North Van"
- Province will default to British Columbia
- Postal Code should be entered using the proper capitals and spacing; it does not automatically format
- Neighbourhood is a category that can be entered if it is useful for agencies to know what part of town is being referenced, e.g. Kerrisdale, Mount Pleasant.
- Enter Marital Status
- Enter how long the client has been a member – Enter date as mm/dd/yyyy
- Low Income is a category that may or may not be appropriate
- Enter client's Gender
- Type – this refers to a selection of categories that are helpful for tracking. For STARrides clients most of these will refer to the client's age.
- Donor – If the client is also a donor, tick this box
- Enter client's Email

2.2.3 Groups:

At this point you may assign the Client to different Group memberships if you so desire. Groups are addressed more thoroughly in the section <u>Add/Edit Groups</u>.

- Click on Groups button and a new window will open with a list of available groups. Select those that pertain to the Client.
- If you are charging for rides or services, everyone should be a member of the "Individual Trip Account" Group.
- Click Update and then Close.

2.2.4 Vehicle Type

Client may require a vehicle that is specific to their needs, such as low to the curb, wheelchair accessible etc. Indicate the vehicle type in this section.

2.2.5 Client Contact Information

Up to four contacts may be entered in this section.

2.2.6 Notes

Both public notes, viewable by drivers, and private notes, for office use only, may be entered in these sections.

2.2.7 Click Submit to finalize client data entry.

You must submit the Client data before the software will prompt you to map a location.

2.2.8 Useful Buttons on the Membership Information page:

Mapping Client Data and Others:

- Once client data is saved click “Map Member”
- Check to see if the client’s location is correct
- Click “Mark Location” if the information on the map is correct
- Select Close and it will take you back to the Member Information window.

Links to Other Members:

You can link members together using this function in different ways: drivers, escorts and family members

Link Drivers:

Click on Link Drivers to add favourite drivers and block unwanted drivers

This section should be used if a client has specified one or more favourite drivers.

From here you may select the favourite driver from a list and click “Submit.”

The favourite driver will now appear on the client’s information profile.

Link Escorts:

Some agencies provide escorts in addition to drivers to assist members on a trip

Follow the same procedure for linking escorts as is stated above for drivers

Link Family Members:

Follow the same procedure for linking family members as is stated above for drivers and escorts

Notify Method:

Use this section to indicate how the client would like to be notified, for example many seniors like to be telephoned rather than e-mailed.

- Select the “Notify Method” button at the bottom right of the client’s information profile.
- A new window will open, select the type of method that should be used to contact the client (Email. Phone Call, None)

- Click “Submit”

2.2.9 Add Volunteers:

Under the Member Type Dropdown Menu, select “Volunteer.” Click the “Add New Member” button on the right hand side of the page. This section follows the same procedure as adding clients.

Volunteer Type

Select the appropriate volunteer type from the dropdown menu.

More Volunteer Info:

This is where you must enter driver and insurance information, vehicle information, volunteer availability etc. You can list up to two vehicles in this section. Be sure to click the "More Volunteer Info" button when you have entered the basic information.

- Tick the reimbursed box if the driver is going to be compensated.
- There is a Dropdown Menu for entering Volunteer Availability, this is not crucial information, but if entered consistently, then it will assist you in assigning volunteer drivers regularly.
- Click Submit and either return to Member Info or Close

2.3 03 Volunteer Coverage Report

By selecting this option from the main Dropdown Menu a screen will appear with an at-a-glance summary of all volunteer’s availability and characteristics.

- Hovering over the Type button will allow you to view what type of Volunteer position is being held.
- Clicking on the Type button will allow you to add or change Volunteer Types.

2.4 04 Clients Favourite Driver Report

Selecting this option from the main Dropdown menu will list all clients’ favourite driver information. Click here to view the section on how to enter a favourite driver.

2.5 05 Destinations Report

Selecting this option from the main Dropdown menu will show you a list of all of the clients’ destinations that have been entered in the system, their types and status.

Keep in mind that this may be is a shared table. If it is, Destinations used by all agencies using the software will show up in this report.

- To view a report on a selection of ride destinations tick the “Report Rides” box option at the top right of the screen.
- Then enter the dates in the boxes “Begin” and “End” that you would like the report to encompass.
- This will list a report of the number of rides, trips taken, kilometers driven, amount of time taken, etc. within that time frame.
- Report will list all destinations but you may select a specific destination by clicking on its title and view all rides to that destination.
- You can hide the names of clients’ destinations in the destination report if you would like to protect the privacy of the client.

2.5.1 Adding destinations:

- Click “Add a New Destination” button at top right of the screen
- A new window will open to conduct a duplication check
- Enter destination address and postal code and click “Check” to ensure it is a new destination.
- Be sure to give your destination a name under the “Destination Field”
- Be aware though that multiple organizations may share the same destination table.
- If no duplicates found, continue adding Destination, Address, City, Postal Code etc.
- Click “Add New Destination”
- This prompts a “Map Destination” screen to open
- Click “Mark Destination” if mapping is correct
- Note that many individuals may be added to the same location, for example multiple doctors may be added under the same medical institution.
- To enter individuals at a destination click the “Add Individuals” box.
- A new screen will open, you may from here search for individuals that are currently listed under destinations, or add a new entry.

2.6 05D Destination Detail Report

Under the main Dropdown Menu, this selection shows a report of destination details, showing how many trips have been taken to each destination etc.

2.7 013 Add/Edit Groups

Selecting this from the main Dropdown Menu will allow you to view a list of various groups based on clients’ needs, (e.g. Medical Conditions, Funding, Preferred Language, Member Type etc.) This listing of groups can be very useful for tracking different classifications of clients’ needs. Groups also have types which can be viewed by choosing a selection from the "Select Group Type" dropdown menu at the top left of the screen. Conditions Groups is a place to record various medical or other conditions that your client may have, e.g. diabetic, uses a walker etc.

The conditions entered will show up as a list in the Member Information panel.

You may create as many groups as are useful to you and report on them. These will be classed as "Member Groups." Funding groups are used to track funds and all clients will be members of the individual trip account group where there is a fee for rides.

2.7.1 Other Services Groups

If your organization provides other services such as Housekeeping, Light Maintenance etc., you may select the "Other Services" option from the "Select Group Type" Dropdown Menu and enter those groups here. This group option will only be available to agencies that have selected to include "Other Services" while inputting their Agency Information.

2.8 070 Update Agency Information

Select this option from the main dropdown menu to update various information about your agency, e.g. Address, Phone Number, agency's preference for drivers/volunteers to Self-Assign Rides etc. This is also where you would indicate if your agency provides "Other Services/Assistance." Do so here by ticking the "Other Assistance Requests" box under the "Options" heading.

Chapter 3: Using the Software – Booking Rides and Other Services:

3.1 06 Rides Status Report

Under the main Dropdown Menu, this selection shows the rides booked for the current week and their status. From here you may also view rides booked in previous weeks by changing the date in the "List Thru" box. You may also change the report selection by changing the "Ride Status" Dropdown Menu (to outstanding rides, completed, cancelled etc.) This report is useful because it is colour coded and allows you to view at-a-glance the status of the ride, who the client is and the trip's cost. Rides are sorted by the time and date the ride is booked for.

3.2 06W – 06M Ride Status Report Week/Month View

These selections from the Dropdown Menu show the pending rides for the current week and month respectively.

3.3 09 Pending Rides Report

Selecting this report from the main Dropdown Menu allows you to view pending rides that have not yet been assigned a driver. You can use this report to email volunteer drivers to ask if they are available to provide service for any of these rides. This report should typically be sent out once a day towards the end of the workday so that drivers will receive the report showing which rides are still pending. Drivers who are eligible to self-assign or volunteer for later confirmation can sign in to select the rides they want, this function is only for agencies who have selected this option.

3.4 Booking a Ride or Other Service

From any page, click the magnifying glass in the header, then select the client. Their info will appear. Click "New Trip Request" or "Other Assistance"

From one of the 06 reports, click "New Trip Request" or "Other Assistance"

A new window opens.

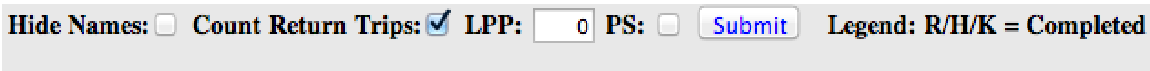
Select the client if needed (client appears automatically if you went through the client contact form).

Click "add Destination". A new window opens. The most common destinations of the client appear in the top of the window and can be selected from there. Otherwise, select from the list or add a new destination. When the destination is selected, you are taken back to the ride booking window.

Click "Driver" and a list of drivers appears. Drivers can be sorted by language group and/or area. The list of available drivers appears in reverse order of when that driver last drove. This allows you to not overburden all the drivers whose names start with A, B, or C as can happen if the list is alphabetical. It also helps balance the load if drivers are restricted in the number of trips per month they can take.

Chapter 4: Reports

Select this section by clicking the RED <u>Report button</u> on the top right hand side of the page from the list of icons. This will open a new window where you can view and print a number of extremely useful reports. Keep in mind that at the top of many of the Report pages there will be a Legend. These will include abbreviations of important keywords pertaining to the specific Report.



4.1 14 Client/Drivers by Group Report

This selection from the main Dropdown Menu on the Reports page will allow you to select any Group you have created and report on its Members, the Number of Rides Taken, etc. by that group.

4.2 20 Summary Rides by Month Report

Selecting this option from the main Dropdown Menu on the Reports page allows you to view Client Types and their activities by month. This report can be copied and exported to an excel spreadsheet for your convenience.

4.3 21 Client/Driver Summary Report

Selecting this report from the main Dropdown Menu will show you a list of all Clients who have taken rides within the specified time frame. Clicking on a client's name will bring up a list of that client's rides, the driver, their destination etc.

4.4 22 Congregation Report/23 Congregation Detail Report

Selecting these reports from the main Dropdown Menu is generally unnecessary and will only be useful if you use these Groups.

4.5 25 Agency Summary Report

Selecting this report from the main Dropdown Menu will demonstrate stats for Agency Clients within a selected time period. This includes interesting data about gender and age of the clients and volunteers.

4.6 28 Client Account Report

Selecting this report from the main Dropdown Menu will demonstrate a list of Client Accounts and their activity during a specified time period. It shows you client's beginning balance, credits, debits and ending balances.

4.6.1 To add a client's beginning balance:

- In the Client Account Report, select a client by name.
- In new window click add transaction
- Enter transaction date to coincide with the membership date.
- Enter dollar amount in the "Amount" section. If no starting amount just enter "0."

- Then click Submit and Close.
- Upon refreshing, the amount will appear in the Client Account Report.
- This also allows you to view a list of trips taken by the Client and, the amount spent on each trip, and the remainder of the Client's balance.

4.6.2 Manage Agency Accounts

Use this option to set up a donor account. Do this if, for example, you have an available pool of donor funds to offset ride costs for a specific pool of clients. You will also need to set up a Funding Group with the name of the account and add appropriate clients to the group.

4.6.2.1 To add funds to an agency account

To add funds to an agency account, first create a client who will be the Donor, e.g. *AAAAA Foundation*.

Follow the steps in 4.6.1 To add to a client's beginning balance. This will put the amount of the donation into the agency account.

The Funding Account will now show up as an option for payment when a ride or service is booked for that client.

At this point, you may change the **Member Type** to **Donor** in the Member Information module.

4.7 29 Donor Account Reports

Select this option from the main Dropdown Menu if you track donations through the STAR software. You can report on each donation here.

4.8 30 Member Detail Report

Select this option from the main Dropdown Menu to see all information about Clients, Volunteers etc. Print this report every so often to back up Client Data and pending Ride Reports, Ride Status Reports etc. You can print this report to a memory stick, file etc. You can also use this report to reconstruct all the data in your database. It is a useful tool to be used for emergency back-up in case of file loss, data crashes etc.

You can select Clients by the month they were born if you want to send out birthday cards or greetings etc. This gesture may be small but could be appreciated by Clients. From here you can also extract client information, like names, addresses etc., to create mailing labels. This information may be exported to an excel file and then printed.

4.9 32 Trip Detail Report

Select this report from the main Dropdown Menu to view a report of all the Rides Taken, Clients, Drivers, Destinations, Kilometers Driven etc. within a specific time period.

4.10 33 Trip Cost Detail Report

Select this report from the main Dropdown Menu to view Trip Cost Detail Reports. Reports charges applied to the client based on trip destination, status, time etc.

4.11 34 Trip Cost by Client Report

Select this option from the main Dropdown Menu to view a report by specified month on client, address, number of destinations, return trips, stops, total trips taken, kilometers driven, time, client account charges, other account funds applied etc. This is the report to use for generating monthly invoices for clients. To export a report, highlight the table you wish to export, copy the information and paste it into an excel document.

4.12 38 Other Services by Volunteer Report

Select this option from the main Dropdown Menu to view a report on other services such as Home Support, Maintenance, Meals on Wheels etc. This report will only be available for organizations who have selected to include "Other Services" while inputting their Agency Information.

4.13 39 Client Inactivity Report

Select this report from the main Dropdown Menu to view the last active date of clients ride usage. You may also select this report to view inactive, archived or deceased clients.

4.14 43 Agency Summary Report by Month

Select this report from the main Dropdown Menu to view an overview of changes in Client Numbers, active Clients or Volunteers within a given month, Total Rides, etc.

Appendix

List of Positions and their Permissible Actions with STARrides Software

Volunteer

50 – Driver Report

Staff or Volunteer flagged as "Office Help"

Please note, Staff and Volunteers flagged as "Office Help" may set up new Clients/Volunteers/Staff but do not have the authority to **Approve** them – approvals must be done by a Supervisor or Manager.

Additionally, Volunteers may only update their own calendars under the "Member Calendar" function.

01 – Add/Edit Ride Types

02 – Add/Edit Clients/Volunteers/etc.

03 – Volunteer Coverage Report

04 – Client Favorite Drivers Report

05 – Destination Report

05D – Destination Report – Details

06 – Rides Status Report

06W – Rides Status Report – Week View

09 – Pending Rides Report

13 – Add/Edit Groups

Supervisor

Please note that Supervisors may view another Supervisor but do not have the authority to **Approve** them – approvals must be done by a Manager.

01 – Add/Edit Ride Types

02 – Add/Edit Clients/Volunteers/etc.

03 – Volunteer Coverage Report

04 – Client Favorite Drivers Report

05 – Destination Report

05D – Destination Report – Details

06 – Rides Status Report

06W – Rides Status Report – Week View

09 – Pending Rides Report

13 – Add/Edit Groups

Manager

As a Manager, it is only at this level that all Member Types may be approved. Additionally, only a Manager may add a new Supervisor or Manager member.

01 – Add/Edit Ride Types

02 – Add/Edit Clients/Volunteers/etc.

03 – Volunteer Coverage Report

04 – Client Favorite Drivers Report

05 – Destination Report

05D – Destination Report – Details

06 – Rides Status Report

06W – Rides Status Report – Week View

09 – Pending Rides Report

13 – Add/Edit Groups

70 – Update Agency Information

71 – Reset Password

For the Report Platform:

Staff or Volunteers flagged as "Office Help"

14 – Client/Drivers by Group

16 – Rides by Ride Group

15 – Destinations by Group

Manager & Supervisor

14 – Client/Drivers by Group

15 – Destinations by Group

16 – Rides by Ride Group

20 – Summary Ride Report by Month

21 – Client/Driver Summary Report

22 – Congregation Summary Report

23 – Congregation Detail Report

24 – Client/Volunteer 1st Trip Report

25 – Agency Summary Report

27 – Agency Billing Report – (U.S. version only)

28 – Client Account Report – (only if Accounting module activated)

29 – Donor Account Report

30 – Member Detail Report

32 – Trip Detail Report

33 – Trip Cost Detail Report

34 – Trips by Client/Volunteer Report

35 – Trips by Individual Provider Report

38 – Other Activities by Volunteer Report

39 – Client Inactivity Report

43 – Agency Summary Report by Month