# Driver Volunteer - Coordinator

## Dave Hassall

**Friday, 6 September 2024**

# Contents

# Background and Objectives

## Background

The Driver Volunteer system was initially developed to support an organisation, like yours, based in Dorset. They originally had a very manual approach whereby emails were sent to Drivers and they replied saying which journeys / trips they could do. The administrator then assigned the roles and emailed back to the Drivers to say who had been assigned.

This was replaced by an online solution which removed this administrative overhead. They were able to increase the number of journeys from 200 to 900 per year.

## Objectives

The purpose of this document is to give you the functionality of the system that is applicable to you, as a Coordinator.

Systems like this are constantly evolving and improving so it is likely that some information in this document will be subtly different to what you see on the system. An example could be extra menu options. These instructions have been prepared using the views from a PC browser. The system can be accessed via a browser on a tablet or phone and this may give slightly different views, but the functionality will not change.

# Instructions

## Accessing the System

Your administrator will have given you a URL (website address) which will include a code which is unique to you.

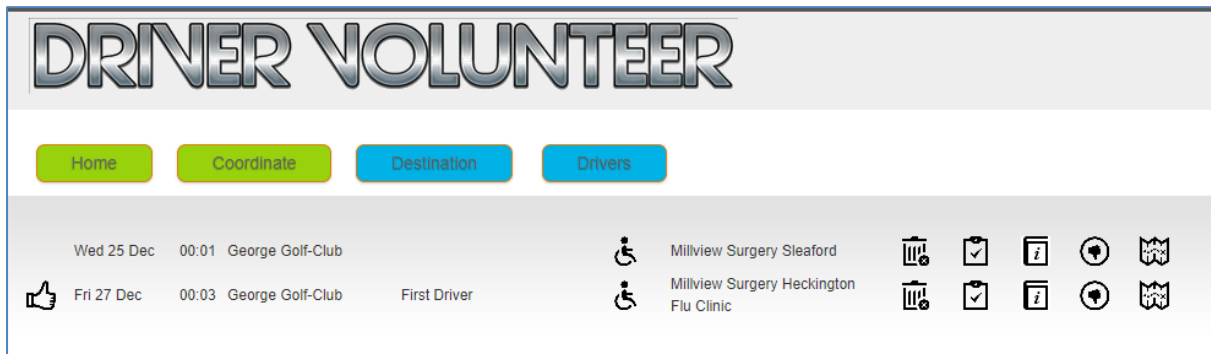\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

IMPORTANT

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

Do NOT share this information with anyone else. On first use add the address to you Favourites or Bookmarks

The URL will look something like this:

https://www.teamscheduler.co.uk/drivervolunteer/CS/PUID/ABCDEFGH-1234-IJKL-5M6N-7890WXYZ4321

## Coordinator Status Page

The link will open a page like this.



The page displays a menu – Home button and other buttons (colours may vary)

You will be shown all future trips.

The system uses a few icons, there is a summary of these at the end of this document. However, they have been honed over time to be self-explanatory.

The list of trips provides the following information.

1.  A driver has volunteered for this trip
2. Day, date and time of the journey
3. Patient name
4. Driver's name if volunteered
5.  if the patient is accompanied

6. ♿ If the patient needs assistance it could be a wheelchair, walking frame or something else.

7. ⇩ or ⇧ if the trip is not the standard i.e. return trip, but a drop off or pick up only

8. Destination
   Department if not the, default, Main Entrance

9. 🗑 Delete this trip

10. 📋 Assign a driver to this trip

11. ℹ to view full information about the trip

12. ⊘ if you need to be removed as the volunteer

13. 📅 Link to show you the journey from with or without driver (opens Google Maps)

## Deleting a trip



Note – If a driver has not been assigned you can edit the journey, rather than delete it, press the ✏ icon, you will be taken to the Request page (see below).

You are presented with some information.

If a driver was assigned then their email address is shown, the system will send the driver and email when you confirm the cancellation.

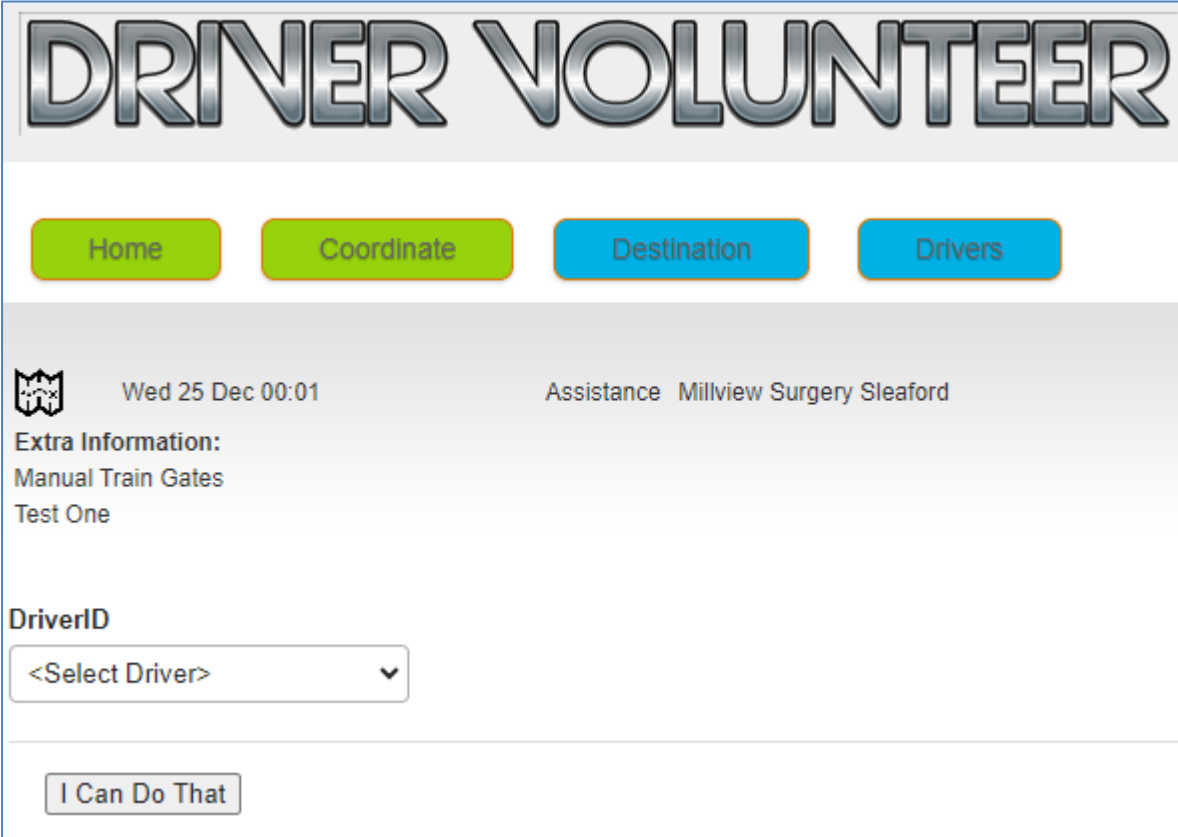The appointment details are show (as a drop down it cannot be changed).

Coord Cancel is a drop down so you can quickly qualify why the trip has been cancelled.

There is an Extra Reason if you need to add extra details for future review.

Select Confirm Cancel to complete the process or use the Home button to abandon.

## Assign a Driver.

This feature allows you to assign a driver. If you have an urgent trip, you may call a driver and then assign them if they agree. For our first system the coordinators husband was a volunteer, and this made life easier for her and him.



From the Drop Down list select the driver you want to assign.

When you press "I Can Do That' you are taken back to the Status Page

## Full Information

You can view the full information for a trip by selecting [i] you will see the same screen as the Drivers.

You do not have the Printer Friendly button.

## Cancelling

If a driver needs to cancel but cannot do it themselves they can contact you and you can cancel on their behalf.

Selected the  for the trip they have volunteered for you will be taken to this page.



Please be honest with your reason. It may be that something else has come up or it might be something to do with the patient. If the coordinators are kept informed, then they address issues.

You will be returned to the Status Page.

## Google Maps

If you select the ⛩ you will be shown the route from the driver to the patient and then the destination. Google Maps defaults to "fastest" routes and this may not be the shortest route. The coordinators can specify the route they prefer drivers to take using a "via point". Note Drivers are free to use other routes but the compensation calculation works against the specified route.

## Destinations and Departments

When you select the Destination button from the menu you will be taken to this page.



Whether you are dealing with Destinations, Drivers or Patients the process begins with a search. This is to limit the chance of duplication. (We will talk about a real-world situation at the end of this section).

In the following example I have searched for "Mill".

If the search finds any matches these are presented to you

The list of destinations provides the following information.

1.  Edit the chosen Destination, including Departments for the Destination
2.  The Destination is Active
3.  The Destination is NOT Active, e.g. this could have been Covid vaccination station
4.  Add a new Destination.

The Edit and Add opens the next page

The primary information is shown at the top
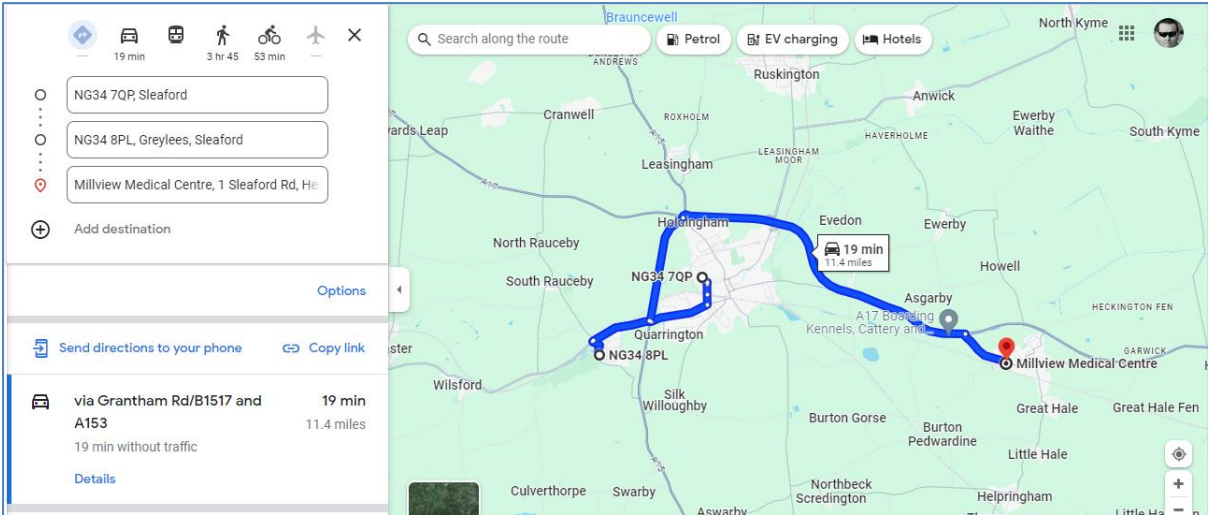
## Destination

This should be unique to identify it clearly to all users.

In this example if you click the  the initial link is

[https://www.google.co.uk/maps/dir/NG34%207QP/NG34%208PL/Millview%20Surgery%20Heckingt on%20NG34%209QP](https://www.google.co.uk/maps/dir/NG34%207QP/NG34%208PL/Millview%20Surgery%20Heckington%20NG34%209QP)
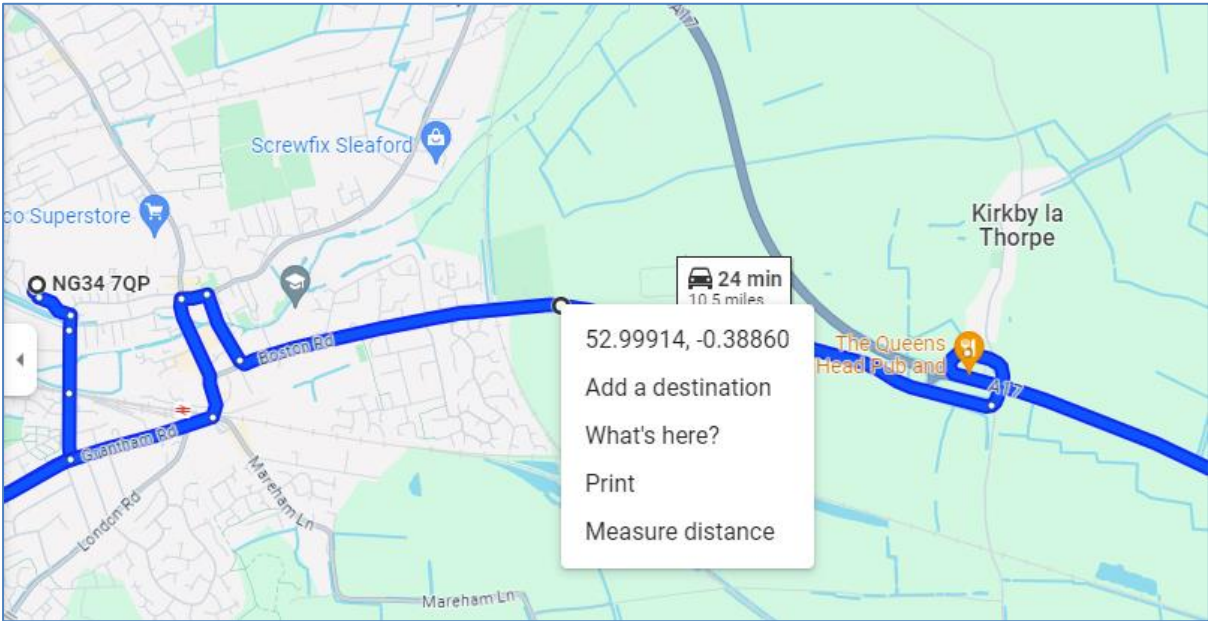
But Google "corrects" this

## Post Code

The Post Code of the Destination

## Via Long/lat

This allows you to override Googles default which is Fastest, but this is 19 Miles. If you drag the route, in this case not via Holdingham but more direct



If you "right click" on the route you see the above information, click the Coordinates and you can then paste the value in

52.99898721171983, -0.3887692459889614 or type the shorter version yourself.

The link above now becomes
https://www.google.co.uk/maps/dir/NG34%207QP/NG34%208PL/52.9989,%20-0.3887/Millview%20Surgery%20Heckington%20NG34%209QP which includes the Via Point

You may also need to use Via Point if you know the shortest route is NOT available due to road closure.

## Extra Info

Any extra information to assist the driver e.g. "Journeys could be longer on Wednesday - Market Day"

## Active

Set the status of the Destination.

There are further fields to provide extra information for the Driver

Street1:

1 Sleaford Road

Street2:

Town:

Heckington

County:

Suggested Contribution:

5.00

Parking (0 = not applicable):

0.00

Submit

When you press submit you are taken back to the Destination search page

Once a location has been created when you search then below the Submit button you will see Departments.

## Departments

Every location has a Default Department which is shown as Main Reception (which is a generic term)

You can add or edit Departments using the selection below the Submit button

**Parking (0 = not applicable):**

0.00

**Submit**

🖉

👁

Flu Clinic

🏥

zNew Department

The list of departments provides the following information.

1. 🖉 Edit the chosen Department
2. 👁 The Department is Active
3. 👁̸ The Department is NOT Active, e.g. this could be a department that has closed
4. 🏥 Add a new Department.

The Edit and Add opens the next page

# DRIVER VOLUNTEER

| Home | Coordinate | Destination | Drivers |

## Department for Millview Surgery Heckington NG34 9QP

**Department:**

Flu Clinic

**Extra Info:**

October to December

**Active:**

✔

**Submit**

Enter or Edit the data for the Department and set it's active Status.

When you press Submit you are returned to Destination search.

## Real World Example

One of our users in Dorset set up 2 Destinations:

Poole NHS Healthcare Centre Dolphin Centre Boots

Poole NHS Healthcare Centre Dolphin Centre Beales

They were set up at different times (possibly years apart). During an update we spotted the "duplication". The Beales location was set to inactive, and the Boots location renamed. The locations were now added as Departments.

This meant that only one Destination needed to be maintained and the Departments had localised Extra Info.

## Drivers



Whether you are dealing with Destinations, Drivers or Patients the process begins with a search. This is to limit the chance of duplication. (We will talk about a real-world situation at the end of this section).

In the following example I have searched for "Fir".

The list of Drivers provides the following information.

1.  Edit the chosen Driver
2.  The Driver is Active
3.  The Driver is NOT Active, e.g. a Driver may have been ill and stepped away for a while
4.  Add a new Driver.

The Edit and Add opens the next page



## Creating Trips

To coordinate Trips select the Coordinate menu button.

All Trips begin with the Patient.

As with everything else use the search recommendations to get the right person.

In the following example I have searched for "NG34" to show all patients in an area, but then I will use "geo"

The list of Patients provides the following information, it is sorted in Active, Not Active:

1. **Select** Select this Patient to assign a trip

2. ✎ Edit the chosen Patient

3. ⦸ The Patient is NOT Active, e.g. a Patient may have been ill and stepped away for a while

4. 👤⊕ Add a new Patient.

The Edit, Not Active and Add open the next page



Enter the details for the Patient. The Active box allows you to permanently, or temporarily take people out of the system. They may be being removed permanently (moved away, deceased) or temporarily if they are going to return to the area.

The Select button allows you to assign a trip with the following page



Any existing Trips for the patient are shown, again to prevent duplication.

The Patient is shown in Drop Down but this cannot be changed

After selecting the Destination, you will then get the option to select the Department, even if it is the only option (Main Reception).

Complete the rest of the details and press Submit

## Email Alerts

The system uses the Driver's email address to provide them with updates.

There are two types of updates.

1. A trip has been cancelled, which is sent if the coordinator cancels a trip

2. Trips that need volunteers. A background schedule sends emails to all ACTIVE drivers alerting them of Urgent trips. These are trips in the next few days that have not been volunteered for.

## Searching Recommendation

You can search for a Post Code or a partial name

A search for 'George' could return 'George Smith' or 'Charlie George', as first and last names are stored separately.

'Geo' could return 'George Smith' or 'Georgina Jones'

Shortening the search term helps when searching for variants of names e.g. 'dav' will find 'Dave' and 'David'.

This technique goes some way to preventing duplicate entries.

## Conclusion

That concludes these instructions. If you have any questions or suggestions, please contact your coordinator. We constantly strive to improve our solutions and something that works for you may be of use to our other users.