



How to be successful with SafeRide Health

Importing Rides



How to Update Rides

The screenshot shows the SafeRide Health interface. On the left is a sidebar with navigation options: Live Rides, Scheduled, Stats, Ride History, Vehicle Routing, Fleet, Live Chat, Payments, Book Ride, Import Rides, and Export Rides. The 'Export Rides' option is highlighted with a red arrow labeled '2'. The main content area is titled 'Export Rides' and features a progress bar with four steps: Step 1 Select Dates, Step 2 Select Fields, Step 3 Rename Data, and Step 4. Below the progress bar, there is a 'Filter By Date' section with a date range of 'Oct 19, 2023 - Oct 19, 2023' and a red arrow labeled '3' pointing to it. Below that is a 'Filter By Client' section with a dropdown menu showing 'All', 'Default', and 'Evan_RC', with a red arrow labeled '4' pointing to it. Below the client filter, there are three checkboxes: 'Include all rides labelled as Cancelled', 'Include all rides labelled as NEMT Unable to Fulfill', and 'Include all rides labelled as Driver Unable to Fulfill'. A red box highlights these checkboxes, with a red arrow labeled '4' pointing to it. At the bottom, there is an orange button labeled 'Next: Select Fields' with a red arrow labeled '5' pointing to it.

To Update Rides

1. Select Export Rides Tab
2. Filter by dates of rides
3. Select All
4. Uncheck all 3 boxes
5. Click "Next Select Fields"

How to Update Rides

🚗 Live Rides

📅 Scheduled

📊 Stats

☰ Ride History

🕒 Vehicle Routing

🚚 Fleet

💬 Live Chat

💰 Payments

📍 Book Ride

📄 Import Rides

📤 Export Rides

Step 1
Select Dates

Step 2
Select Fields

Step 3
Rename Fields

Apply My Templates (Select one of your)

☐ Billing Training

×

OR

Create a New Template

☒ Billing Import

ⓘ

Rename Fields

Export This Field	Field Name
☒	rideId
☐	tripId
☐	fromAccount

Updating Ride Cont.

1. Select Dot to Create Template
2. Name Template “Billing Import”

Note:
Template will Saved for Future Use

How to Update Rides

Rename Fields

Export This Field	Field Name	Rename Field As
☒	rideId	rideId
☒	status	status
☒	confirmationStatus	confirmationStatus
☒	vehicleName	vehicleName
☒	inboundDate	inboundDate
☒	arrivedDate	arrivedDate
☒	startedDate	startedDate
☒	completedDate	completedDate

Verify Date Format (We want to ensure your month and dates are synced correctly.)

Updating Rides Cont.

1. Select Listed Fields for Export
2. Verify Format is MM/DD/YYYY HH:MM
3. Click "Next: Rename Data"

How to Update Rides

Step 1
Select Dates

Step 2
Select Fields

Step 3
Rename Data

Step 4
Split Data

Step 5
Arrange Data

Step 6
Export

Rename Data

If your external data is labeled differently, then you can change these category names here. For example, "WCV" could be renamed needs to be exported for your records.

Field Name	Rename Data
------------	-------------

Back

Next: Split Data

1

Updating Ride Cont.

1. Click "Next: Split Data"

How to Update Rides

Step 1
Select Dates

Step 2
Select Fields

Step 3
Rename Data

Step 4
Split Data

Step 5
Arrange Data

Step 6
Export

Split Data

Select which fields need to be split for better tracking. For example splitting patientName into firstName and lastName.

Field Name	Split Data
inboundDate	Split
startedDate	Split
arrivedDate	Split
completedDate	Split

Back

Next: Arrange Data

1

Updating Rides Cont.

1. Click "Next: Arrange Data"

How to Update Rides

Step 1
Select Dates

Step 2
Select Fields

Step 3
Rename Data

Step 4
Split Data

Step 5
Arrange Data

Drag and drop to reorder fields

Reorder how your fields are exported. Fields ordered from top-to-bottom will export as columns from left to right.

≡

 rideId

≡

 status

≡

 confirmationStatus

≡

 driverName

≡

 vehicleName

≡

 inboundDate

≡

 arrivedDate

≡

 startedDate

≡

 completedDate

Back

Next: Preview

1

How to Update Rides

Export Rides

Step 1
Select Dates

Step 2
Select Fields

Step 3
Rename Data

Step 4
Split Data

Step 5
Arrange Data

Step 6
Export

Preview Data

Back

Export

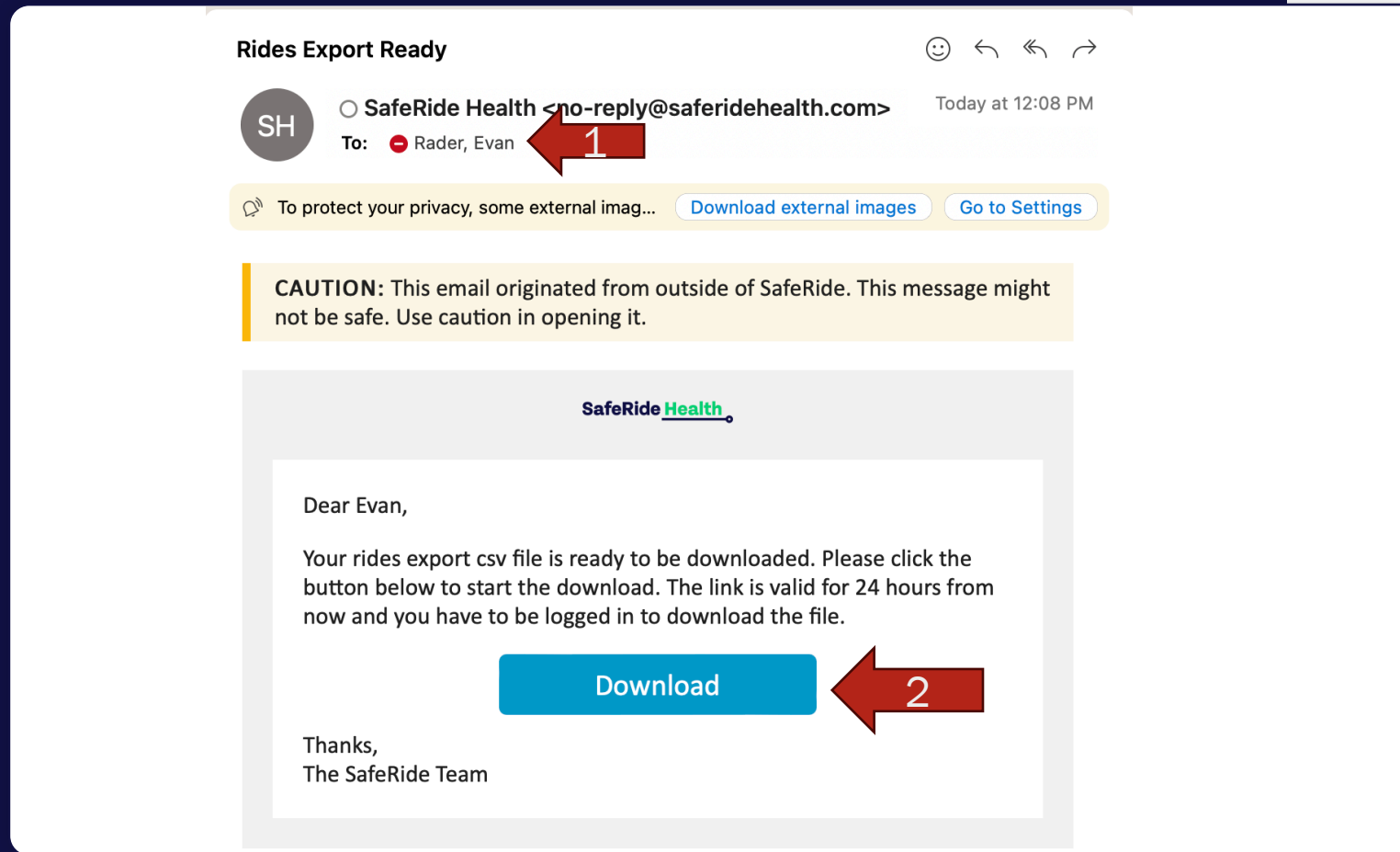
1

rideId	status	confirmationStatus	driverName	vehic
--------	--------	--------------------	------------	-------

Updating Rides Cont.

1. Click "Export"

How to Update Rides



Updating Rides Cont.

1. Email Will be Received by Person who Requested Export
2. Click Blue Download Button

How to Update Rides

The screenshot shows a spreadsheet application window titled 'Book2'. The ribbon includes tabs for Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Automate, and Tell me. The 'Home' tab is active, showing options for font (Calibri, size 12), bold, italic, underline, and text color. The spreadsheet contains a table with the following data:

	A	B	C	D	E	F	G	H	I
	rideld	status	confirmation	driverName	vehicleName	inboundDate	arrivedDate	startedDate	completedDate
2	13102993	Scheduled	confirmed	Unassigned	Unassigned				
3	13102996	Scheduled	confirmed	Unassigned	Unassigned				

Two red arrows are overlaid on the spreadsheet. Arrow '1' points to the 'rideld' column header. Arrow '2' points to the 'status' column header. The formula bar at the top shows 'I4' and a formula icon.

Updating Rides Cont.

1. Confirm Ride ID from Export
2. Switch Status to "Completed"

See next slide

How to Update Rides

The screenshot shows the Microsoft Excel interface with a spreadsheet titled 'Book2'. The ribbon is set to 'Home'. The spreadsheet contains the following data:

	A	B	C	D	E	F	G	H	I
1	rideld	status	confirmation	driverName	vehicleName	inboundDate	arrivedDate	startedDate	completedDate
2	13102993	Completed	confirmed	Unassigned	Unassigned				
3	13102996	Completed	confirmed	Unassigned	Unassigned				

Two red arrows are overlaid on the spreadsheet. Arrow '1' points to the 'driverName' column (column D), and arrow '2' points to the 'vehicleName' column (column E).

Updating Rides Cont.

- 1. Enter Driver Name
- 2. Enter Vehicle Name

How to Update Rides

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E				
	rideId	status	confirmation	driverName	vehicleName	inboundDate	arrivedDate	startedDate	completedDate
1	13102993	Completed	confirmed	George O Jungle	106432				
2	13102996	Completed	confirmed	George O Jungle	106432				

Red arrows indicate the following steps for updating rides:

1. Populate "InboundDate"
2. Populate "arrivedDate"
3. Populate "startedDate"
4. Populate "completedDate"

Updating Rides Cont.

1. Populate "InboundDate"
Vehicle goes towards ride
2. Populate "arrivedDate"
Vehicle arrives at pick up
3. Populate "startedDate"
Vehicle Leaves Pick up Location
4. Populate "completedDate"
Vehicle Arrives at Appointment

Note:

Format should match

MM/DD/YYYY | 10:00

How to Update Rides

The screenshot shows the Microsoft Excel interface with the 'Book2' title bar. The ribbon is set to 'Home'. A red arrow labeled '1' points to the font settings (Helvetica Neue, size 10). The formula bar shows '10/19/2023 1:15:00 PM'. The spreadsheet contains the following data:

	A	B	C	D	E	F	G	H	I
1	rideId	status	confirmation	driverName	vehicleName	inboundDate	arrivedDate	startedDate	completedDate
2	13102993	Completed	confirmed	George O Jungle	106432	10/19/23 10:00	10/19/23 10:14	10/19/23 10:15	10/19/23 10:46
3	13102996	Completed	confirmed	George O Jungle	106432	10/19/23 13:00	10/19/23 13:15	10/19/23 13:30	10/19/23 13:45

A red arrow labeled '2' points to the cell containing '10/19/23 13:15' in row 3, column G.

Important Notes

- Date on cell will equal 1:15pm
- Date on cell will convert to military time

How to Update Rides

SafeRide Health

Back to Admin

Live Rides

Scheduled

Stats

Ride History

Vehicle Routing

Fleet

Live Chat

Payments

Book Ride

Import Rides

Import Rides

Step 1 Upload File

Step 2 Verify Fields

Step 3 Map Fields

Step 4 Invoice Client

Step 5 Map Dependent Fields

Step 6 Preview Import

Step 7 Import

Upload your file

Please upload a CSV file. You will be able to verify your import fields in the following step.

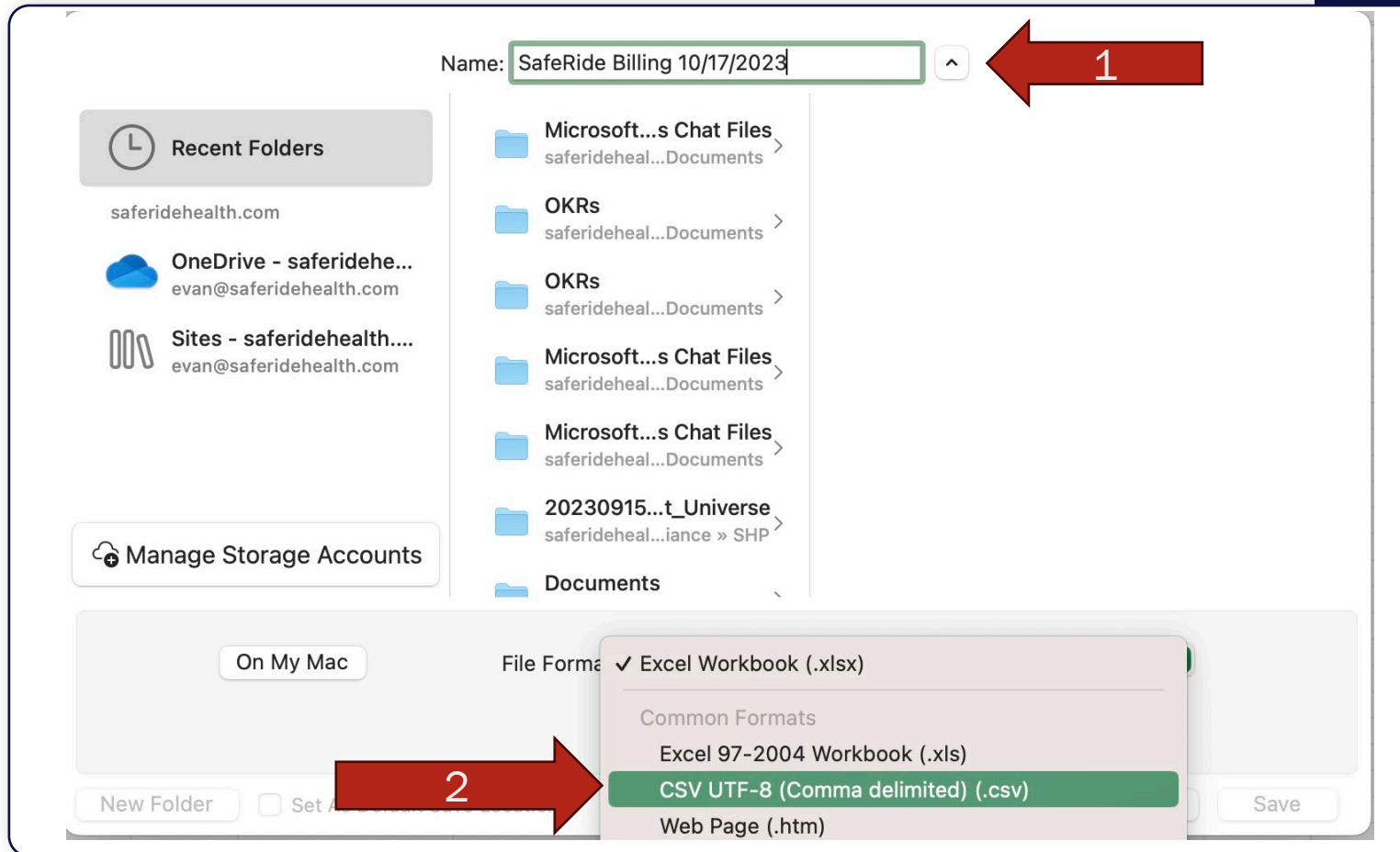
Choose File No file chosen

Upload & Preview

Updating Rides Cont.

1. Go to “SafeRide portal”
2. Select “Import Rides”
3. Click “Choose File”

How to Update Rides



Updating Rides Cont.

1. Rename document to unique Identifier
2. Document must be saved as a .CSV

How to Update Rides

SafeRide Health

- Live Rides
- Scheduled
- Stats
- Ride History
- Vehicle Routing
- Fleet
- Live Chat
- Payments
- Book Ride
- Import Rides**

Import Rides

Step 1 Upload File Step 2 Verify Fields Step 3 Map Fields

Step 7 Import

Upload your file

Please upload a CSV file. You will be able to verify your import

Choose File SafeRide Billing 10-17-2023.csv

Upload & Preview

Updating Rides Cont.

1. Verify File is correct
2. Click “Upload & Preview”

How to Update Rides

Import Rides

Step 1
Upload File

Step 2
Verify Fields

Step 3
Map Fields

Step 4
Invoice Client

Step 5
Map Dependent Fields

Step 6
Preview Import

Step 7
Import

Apply My Templates (Select one of your saved templates)

OR

Create a New Template

☒ Billing Template ⓘ



Updating Rides Cont.

1. Select Create a New Template

How to Update Rides

Verify Fields

We've scanned your file and found the following fields. Please verify that your headers are mapped correctly to the corresponding SafeRide fields.

Uploaded CSV Fields	SafeRide Fields	Uploaded CSV Data
rideId	Unique Ride Id	14146397
status	Ride Status	Completed
confirmationStatus	Confirmation Status	confirmed
driverName	Driver Name	Homer Simpson
fulfilledBy	Fulfillment Type	Dispatcher Managed
vehicleName	Vehicle Name	AMB
inboundDate	Inbound Time	12/01/2023 06:26
arrivedDate	Arrival Time	12/01/2023 06:30
startedDate	Start time	12/01/2023 06:40
completedDate	Completed Time	12/01/2023 06:45

Verify Date Format

(We want to ensure your month and dates are synced correctly.)

MM/DD/YYYY

Back

Next

Updating Rides Cont.

1. Map Excel Columns to below fields
2. Change "Verify Date Format" to DD/MM/YYYY
3. Click Next at bottom of screen

Note:
After you set up mapping. The Template is saved.

How to Update Rides

Map Your Vehicles

File Vehicle Name

106432

SafeRide Vehicles Name

Wheelchair ▾

1

Map Your Drivers

File Driver Name

George O Jungle

SafeRide Drivers Name

George O Jungle ▾

2

Map Statuses

File Status

Completed

Statuses

Completed ▾

3

Map Confirmations Statuses

File Confirmation Status

confirmed

Confirmation Statuses

Confirmed ▾

4

Back

Preview

Updating Rides Cont.

1. Map your “Vehicle Name” to SafeRide Vehicle Name
2. Map your “Driver Name” to SafeRide Driver Name
3. Map “File Status” to Completed
4. Map “Confirmation Status” to Confirmed

How to Update Rides

Preview import

The following rides have been mapped from your file. Please see remarks for import success status.

Pickup & Dropoff	Date & Time	Patient Details	Ride Details	Client	Remarks
Pickup: Not Mapped DropOff: Not Mapped	Pickup: Not Mapped	Not Mapped Health Plan: Self Funded M: Not Mapped	Distance: Not Mapped Miles Cost: Not Mapped		✓
Pickup: Not Mapped DropOff: Not Mapped	Pickup: Not Mapped	Not Mapped Health Plan: Self Funded M: Not Mapped	Distance: Not Mapped Miles Cost: Not Mapped		✓

Back

Import

1

Updating Rides Cont.

1. If Ride have Check mark, click “Import”

C

5. Adjustment Status

- Once adjustments are approved, you can see the amount it was approved for, and it is now considered eligible for payment.
- Total Supplier Cost for the ride updates incrementally when the adjustment is approved.

April 27, 2023 - Jun 27, 2023

Stats

Hi SafeRide Dispatch (United URide)

Live Rides

Scheduled

Ride History

Billing

Fleet

Import Rides

Export Rides

Alerts

Email Support

Search Ride ID or Adjustment ID

Rides / Adjustments

Invoices

Export View

6

1

456

1,456

Not Submitted Rides

Requires Clarification

Upcoming Invoice

All Rides

Ride ID	Ride Date	Ride Status	Required Updates	Supplier Cost	Claim Status	Submit Ride By	Payment Status	Adjustments
123456	01/01/2024	Completed		\$ 89.00	Submitted	02/15/2024	Paid	0 Close

Adjustment

Adjustment ID: 123456

Submission Dates

Requested on: 01/15/24

Resolved on: 01/21/24

Details

Reason For Dispute

Pickup Location Incorrect

Requested Amount

\$4.00

Approved Amount

\$4.00

Note

Pick up was in the back of the complex. Extra distance to circle around

Adjustment Status:

Under Review

Requires Clarification*

Approved

Denied

Delete

Adjustment

Adjustment ID: 123458

Submission Dates

Requested on: 01/15/24

Revised on: 01/20/24

Resolved on: 01/21/24

Details

Reason For Dispute

Mobility Incorrect

Requested Amount

\$5.00

Approved Amount

\$5.00

Note

Member had wheelchair

Adjustment Status:

Under Review

Requires Clarification*

Approved

Denied

Delete

Adjustment Cutoff Date: 01/30/24

Adjustment

Claim Summary

Ride ID: 123456

Funding Source: United Health

Details

Ride Cost

\$80.00

Adjustment ID: 123456 | Approved on: 01/15/24

\$4.00

Adjustment ID: 123458 | Approved on: 01/21/24

\$5.00

Supplier Cost

\$89.00

Payment Status

Paid

Not-Invoiced

Not-Invoiced

Invoice

Id: 456789

Id:

Id:

View Invoice

View Invoice

View Invoice

5. Adjustment Status

- Once adjustments are approved, you can see the amount it was approved for, and it is now considered eligible for payment.
- Total Supplier Cost for the ride updates incrementally when the adjustment is approved.
- The adjustments can be paid out on the same invoice or separately to not hold up invoicing for the original ride.

April 27, 2023 - Jun 27, 2023

Stats

Hi SafeRide Dispatch (United URide)

Live Rides

Scheduled

Ride History

Billing

Fleet

Import Rides

Export Rides

Alerts

Email Support

Search Ride ID or Adjustment ID

Preset Filters

6

Not Submitted Rides

1

Requires Clarification

456

Upcoming Invoice

1,456

All Rides

Rides / Adjustments

Invoices

Export View

Ride ID	Ride Date	Ride Status	Required Updates	Supplier Cost	Claim Status	Submit Ride By	Payment Status	Adjustments
123456	01/01/2024	Completed		\$ 89.00	Submitted	02/15/2024	Paid	0 Close

Adjustment

Adjustment ID: 123456

Submission Dates

Requested on: 01/15/24

Resolved on: 01/21/24

Details

Reason For Dispute

Pickup Location Incorrect

Requested Amount

\$4.00

Approved Amount

\$4.00

Note

Pick up was in the back of the complex. Extra distance to circle around

Adjustment Status:

Under Review

Requires Clarification*

Approved

Denied

Delete

Adjustment

Adjustment ID: 123458

Submission Dates

Requested on: 01/15/24

Revised on: 01/20/24

Resolved on: 01/21/24

Details

Reason For Dispute

Mobility Incorrect

Requested Amount

\$5.00

Approved Amount

\$5.00

Note

Member had wheelchair

Adjustment Status:

Under Review

Requires Clarification*

Approved

Denied

Delete

Adjustment Cutoff Date: 01/30/24

Adjustment

Claim Summary

Ride ID: 123456

Funding Source: United Health

Details

Ride Cost

\$80.00

Adjustment ID: 123456 | Approved on: 01/15/24

\$4.00

Adjustment ID: 123458 | Approved on: 01/21/24

\$5.00

Supplier Cost

\$89.00

Payment Status

Invoice

Paid

Id: 456789

View Invoice

Not-Invoiced

Id:

View Invoice

Not-Invoiced

Id:

View Invoice