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PtMS for Windows Help: Scheduling

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Help Topics

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Entering a New Service Request

Select a client record then click on the "Schedule Trip" button on the tool bar at the bottom of the client record.

The screenshot shows the 'PtMS For Windows - Clients' window. The title bar indicates the date and time as 10/12/09 08:43:24 and the phone number 091609-1400. The window has a menu bar with options: Client Info, Client Billing, Emerg Info /Certs, Agency Billing, Pickup Info, Sched Trips, Trip Hx, Options, and View Providers. The main area contains a form for client information. Fields include Client ID (2), Last Name (WASHINGTON), First Name (GEORGE), MI, Address 1 (122 E JEFFERSON STREET), Address 2 (APT 5), Zipcode (19063), State (PA), County, City (MEDIA), PHONE, SSN, Med ID, Other ID, Sex (M), Intake Date, DOB, Language, Amb Status (AMB), Disability (DIS), Escort, PCA, Cap Adj, and Agencies (MED, GEN, , ,). There are buttons for 'Client Notes' and 'Merge Forms'. A tooltip points to the 'Schedule Trip' button in the toolbar at the bottom, which is highlighted in yellow. The toolbar also includes buttons for Find Client, Clear Scrn, Edit Client, Add Client, Delete Client, GeoCode, Client CMN's, and Quit.

Select the "Trip Type": Demand (enter date), Routine (standing order) or Write In.

PtMS For Windows - Service Request

Service Request - Standard 070709-1445

L. Name: WASHINGTON F. Name: GEORGE MI: Clt ID: 2 Med ID: Req #:

Ref #: Date/Type: 10/12/09 Start On Date: 10/12/09

Take Veh: 999 Ret Veh: 999 Routine Revenue Code Agency: Funding: Purpose:

Take: Destination: STREET ID: 1 Src: C Destin Time: TBS 1205673321, 1034834132

Pickup Place: MEDIA Run: 1205673321, 1034834132

Ret: Destination: STREET ID: 1 Src: C Destin Time: TBS 1205673321, 1034834132

Pickup Place: Run: 1205673321, 1034834132

Pickup Zone: Name: Run:

Driver Instructions: WC: AMB Esc: PCA:

M	T	W	T	F	Sa	Su	Tripcode	Rate	Fare	Calc Miles
Take:										0
Ret:										0

Last User: Last Update Time: Updated:

Pick Demand Days New Destination Map Quest: Take P/U Save Service Request View History Cancel

Select the trip type - Demand (date), Routine (standing order) or Write In

Select the take and return vehicle. If the trip is going to be assigned to a vehicle later, select one of the unassigned trips "vehicles" such as "999".

PtMS For Windows - Service Request

Service Request - Standard 070709-1445

L. Name: WASHINGTON F. Name: GEORGE MI: Clt ID: 2 Med ID: Req #:

Ref #: Date/Type: 10/12/09 Start On Date:

Take Veh: A01 Ret Veh: 999 Pick Revenue Code Agency: Funding: Purpose:

Take: Destination: A01 ABC TRANSPORTATION VAN 1205673321, 1034834132

Pickup Place: 122 EJEFF ABC UNASSIGNED TRIPS 1205673321, 1034834132

Pickup Zone: 496500 E01 EASY TRANSPORTATION VAN 1205673321, 1034834132

Ret: Destination: 122 EJEFF E02 EASY TRANSPORTATION VAN 1205673321, 1034834132

Pickup Place: F1A EASY TRANSPORTATION UNASSIGNED TRIPS 1205673321, 1034834132

Pickup Zone: Deviated Fixed Routes Deviated Fixed Route 1 - Run A 1205673321, 1034834132

Driver Instructions: WC: AMB Esc: PCA:

M	T	Tripcode	Rate	Fare	Calc Miles
Take:					0
Ret:					0

Last User: Last Update Time: Updated:

Pick Demand Days New Destination Map Quest: Take P/U Save Service Request View History Cancel

Select the take and return vehicle.

Click on the **"Pick Revenue"** code button to display a list of Revenue Codes from the client record. Select a revenue code from the list.

PTMS For Windows - Service Request

Service Request - Standard 070709-1445

L. Name: WASHINGTON F. Name: GEORGE MI: Clt ID: 2 Med ID: Req #:

Ref #: Date/Type: 10/12/09 Start On Date:

Take Veh: A01 Ret Veh: A01 Pick Revenue Code Agency: GEN Funding: GEN Purpose: GEN

Take: Destination: Pickup Place: 122 E JEFFERSON DIA Pickup Zone: 498500

Ret: Destination: 122 E JEFFERSON Pickup Place: Pickup Zone: Name:

Driver Instructions:

M	T	W	T	F	Sa	Su
Take: <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ret: <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Tripcode Rate

Take: GEN \$2.00

Ret: GEN \$2.00

Last User: Last Update Time: Updated:

Click here to select a Revenue Code from the client's record

Revenue Code Selection

MED-MED-MED-MED

GEN-GEN-GEN-GEN

Close

Enter the take and return **pickup and destination times**.

PTMS For Windows - Service Request

Service Request - Standard 070709-1445

L. Name: WASHINGTON F. Name: GEORGE MI: Clt ID: 2 Med ID: Req #:

Ref #: Date/Type: ROUTINE Start On Date:

Take Veh: A01 Ret Veh: A01 Pick Revenue Code Agency: GEN Funding: GEN Purpose: GEN

Take: Destination: Pickup Place: 122 E JEFFERSON DIA Pickup Zone: 498500

Ret: Destination: 122 E JEFFERSON Pickup Place: Pickup Zone: Name:

Driver Instructions:

M	T	W	T	F	Sa	Su
Take: <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ret: <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Tripcode Rate Fare

Take: GEN \$2.00 Calc Miles 0

Ret: GEN \$2.00 Calc Miles 0

Last User: Last Update Time: Updated:

Enter the take and return pickup and destination times.

Take: ID: 1 Src: C Destin Time: 08:30 Pickup Time: 08:00

Ret: ID: 1 Src: C Destin Time: 16:00 Pickup Time: 15:30

WC: AMB Esc: PCA:

Select a **destination** using the lookup destination window.

PtMS For Windows - Service Request

Service Request - Standard

L. Name: WASHINGTON F. Name: GEORGE MI: Clt ID: 2 Med ID: Req #:

Ref #: Date/Type: ROUTINE

Take Veh: A01 Ret Veh: A01 Pick Revenue Code Agency: GEN Funding: GEN Purpose: GEN

Take: Destination: ID: Src: Destin Time: 08:30

Pickup Place: Destination Lookup

Ret: Destination: CROZER CHESTER MED CENTER 2600 W 9TH ST., CHESTER, PA 3

Pickup Place: CVS Pharmacy - Media 17

Pickup Zone: Delaware County Community College 15

Driver Instruction: Delaware County Courthouse 201 W Front 10

Granite Run Mall 1067 West Baltimore Pike, MEDIA, PA 11

Destination: Address: ID: Src: Destin Time: 08:30

Apply Filter Enter the beginning text in the Destination or Address boxes and then click the Apply Filter button to narrow down your destination choices. Click the Remove Filter button to show all destinations.

Remove Filter

Cancel

Click here to display the Destination Lookup window to select a destination

Click on the destination to select it from the list

Enter **driver instructions** and select escort or attendant if needed.

PtMS For Windows - Service Request

Service Request - Standard 070709-1445

L. Name: WASHINGTON F. Name: GEORGE MI: Clt ID: 2 Med ID: Req #:

Ref #: Date/Type: ROUTINE Start On Date:

Take Veh: A01 Ret Veh: A01 Pick Revenue Code Agency: GEN Funding: GEN Purpose: GEN

Take: Destination: Delaware County Community College ID: 15 Src: D Destin Time: 08:30 1205423927, 1035539204

Pickup Place: 122 E JEFFERSON STREET ID: 1 Src: C Pickup Time: 08:00 1205673321, 1034834132

Pickup Zone: 498500 Name: MEDIA Run:

Ret: Destination: REET ID: 1 Src: C Destin Time: 08:30 1205673321, 1034834132

Pickup Place: Community College ID: 15 Src: D Pickup Time: 08:00 1205423927, 1035539204

Pickup Zone: 533487 Name: MEDIA Run:

Driver Instructions: Assist client on and off vehicle WC: AMB Esc: PCA:

M T W T F Sa Su Tripcode Rate Fare

Take: GEN \$2.00 Calc Miles 0

Ret: GEN \$2.00 Calc Miles 0

Last User: Last Update Time: Updated:

Pick Demand Days New Destination Map Quest: Take P/U Save Service Request View History Cancel

Enter driver instructions here

Select if client requires escort or

Select days of week for Routine trips, if entering a demand trip click on the Pick Demand Days button to select specific dates to include in the trip.

PtMS For Windows - Service Request

Service Request - Standard 070709-1445

L. Name: WASHINGTON F. Name: GEORGE MI: Clt ID: 2 Med ID: Req #:

Ref #: Date/Type: ROUTINE Start On Date:

Take Veh: A01 Ret Veh: A01 Pick Revenue Code Agency: GEN Funding: GEN Purpose: GEN

Take: Destination: Delaware County Community College ID: 15 Src: D Destin Time: 08:30 1205423927, 1035539204

Pickup Place: 122 E JEFFERSON STREET ID: 1 Src: C Pickup Time: 08:00 1205673321, 1034834132

Pickup Zone: 498500 Name: MEDIA Run:

Ret: Destination: JEFFERSON STREET ID: 1 Src: C Destin Time: 16:00 1205673321, 1034834132

Pickup Place: Delaware County Community College ID: 15 Src: D Pickup Time: 15:30 1205423927, 1035539204

Name: MEDIA Run:

Driver Instructions: Assist client on and off vehicle WC: AMB Esc: PCA:

M	T	W	T	F	Sa	Su	Tripcode
Y	Y	Y	Y	Y	Y	Y	GEN
Y	Y	Y	Y	Y	Y	Y	GEN

Last User: Last Update Time: Updated:

Select the days of the week for a Routine trip.

For a demand trip or write in trip click on the Pick Demand Days to select all the dates to include in the trip.

Fares and rates are generally assigned to tripcodes in the tripcode table in setup. Users can manually enter values if needed, however these are generally added by selecting a tripcode from the tripcode table. If the clients Revenue Code included a tripcode then the tripcode, rate, and fare is updated automatically when the Revenue Code is selected.

PtMS For Windows - Service Request

Service Request - Standard 070709-1445

L. Name: WASHINGTON F. Name: GEORGE MI: Clt ID: 2 Med ID: Req #:

Ref #: Date/Type: ROUTINE Start On Date:

Take Veh: A01 Ret Veh: A01 Pick Revenue Code Agency: GEN Funding: GEN Purpose: GEN

Take: Destination: Delaware County Community College ID: 15 Src: D Destin Time: 08:30 1205423927, 1035539204

Pickup Place: 122 E JEFFERSON STREET ID: 1 Src: C Pickup Time: 08:00 1205673321, 1034834132

Pickup Zone: 498500 Name: MEDIA Run:

Ret: Destination: 122 E JEFFERSON STREET ID: 1 Src: C Destin Time: 16:00 1205673321, 1034834132

Pickup Place: Delaware County Community College ID: 15 Src: D Pickup Time: 15:30 1205423927, 1035539204

Pickup Zone: 533487 Name: MEDIA Run:

Driver Instructions: Assist client on and off vehicle WC: AMB Esc: PCA:

M	T	W	T	F	Sa	Su	Tripcode	Rate	Fare
Y	Y	Y	Y	Y	Y	Y	GEN	\$2.00	Calc Miles 0
Y	Y	Y	Y	Y	Y	Y	GEN	\$2.00	Calc Miles 0

Last User: Last Update Time: Updated:

Fares and Rates are generally assigned to Tripcodes in setup, but can be manually entered here.

Click on "Calc Miles" to calculate the one way trip miles from the map.

PTMS For Windows - Service Request

Service Request - Standard 070709-1445

L. Name: WASHINGTON F. Name: GEORGE MI: CIt ID: 2 Med ID: Req #:

Ref #: Date/Type: ROUTINE Start On Date:

Take Veh: A01 Ret Veh: A01 Pick Revenue Code Agency: GEN Funding: GEN Purpose: GEN

Take: Destination: Delaware County Community College ID: 15 Src: D Destin Time: 08.30 1205423927, 1035539204
 Pickup Place: 122 E JEFFERSON STREET ID: 1 Src: C Pickup Time: 08.00 1205673321, 1034834132
 Pickup Zone: 498500 Name: MEDIA Run:

Ret: Destination: 122 E JEFFERSON STREET ID: 1 Src: C Destin Time: 16.00 1205673321, 1034834132
 Pickup Place: Delaware County Community College ID: 15 Src: D Pickup Time: 15.30 1205423927, 1035539204
 Pickup Zone: 533487 Name: MEDIA Run:

Driver Instructions: Assist client on and off vehicle Esc: PCA:

M	T	W	T	F	Sa	Su	Tripcode	Rate	Fare	Calc Miles
Y		Y		Y			GEN		\$2.00	4
Y		Y		Y			GEN		\$2.00	4

Last User: Last Update Time: Updated:

Pick Demand Days New Destination Map Quest: Take Trip Save Service Request View History Cancel

Click to calculate the one way trip mileage.

Select "Save Service Request" to save the service request records and enter the one way trip records into the schedule.

PTMS For Windows - Service Request

Service Request - Standard 070709-1445

L. Name: WASHINGTON F. Name: GEORGE MI: CIt ID: 2 Med ID: Req #:

Ref #: Date/Type: ROUTINE Start On Date:

Take Veh: A01 Ret Veh: A01 Pick Revenue Code Agency: GEN Funding: GEN Purpose: GEN

Take: Destination: Delaware County Community College ID: 15 Src: D Destin Time: 08.30 1205423927, 1035539204
 Pickup Place: 122 E JEFFERSON STREET ID: 1 Src: C Pickup Time: 08.00 1205673321, 1034834132
 Pickup Zone: 498500 Name: MEDIA Run:

Ret: Destination: 122 E JEFFERSON STREET ID: 1 Src: C Destin Time: 16.00 1205673321, 1034834132
 Pickup Place: Delaware County Community College ID: 15 Src: D Pickup Time: 15.30 1205423927, 1035539204
 Pickup Zone: 533487 Name: MEDIA Run:

Driver Instructions: Assist client on and off vehicle WC: PCA:

M	T	W	T	F	Sa	Su	Tripcode	Rate	Fare	Calc Miles
Y		Y		Y			GEN		\$2.00	4
Y		Y		Y			GEN		\$2.00	4

Last User: Last Update Time: Updated:

Pick Demand Days New Destination Map Quest: Take Trip Save Service Request View History Cancel

Click on Save Service Request to create the trip records.

PtMS - Client Records

10/12/09 10:22:06
091609-1400

PtMS For Windows - Clients

Client Info | Client Billing | Emerg Info /Certs | Agency Billing | Pickup Info | **Sched Trips** | Trip Hx | Options | View Providers

T/R	E	Pickup Location	PU	Destination	Drop	D/R	Veh	Date	Day	Stop	Start
T		122 E JEFFERSON STREET	08:00	Delaware County Community	08:30	R	A01	ROUTINE	MON		
R		Delaware County Community	15:30	122 E JEFFERSON STREET	16:00	R	A01	ROUTINE	MON		
T		122 E JEFFERSON STREET	08:00	Delaware County Community	08:30	R	A01	ROUTINE	WED		
R		Delaware County Community	15:30	122 E JEFFERSON STREET	16:00	R	A01	ROUTINE	WED		
T		122 E JEFFERSON STREET	08:00	Delaware County Community	08:30	R	A01	ROUTINE	FRI		
R		Delaware County Community	15:30	122 E JEFFERSON STREET	16:00	R	A01	ROUTINE	FRI		

The trips are now entered and can be viewed in the client's record or in the daily schedule for Mon, Wed, Fri.

■ = Cx/Suspended
 ■ = Deleted
 ■ = Escorts
 ■ = Routine Delayed Start
 Refresh Print Trips

Client: WASHINGTON,GEORGE (2) Double click on date to view Cx/Suspension options.

Find Client Clear Scrn Edit Client Add Client Delete Client Schedule Trip GeoCode Client CMN's Quit

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Reusing Service Requests

Previously entered servic requests for a client can be reused to enter a new request. This can significantly decrease the time it takes a order taker to enter a new service request. Once on the service request screen click on the **"View History"** button to view an reuse previously entered requests.

PtMS For Windows - Service Request

Service Request - Standard 070709-1445

L. Name: WASHINGTON F. Name: GEORGE MI: Clt ID: 2 Med ID: Req #:

Ref #: Date/Type: 10/12/09 Start On Date:

Take: PTMS For Windows - Service Request History

Take: Service Request History - WASHINGTON, GEORGE(2)

Date	Pickup Locations & Time	Destinations & Times	TC's	M	Tu	W	Th	F	Sa	Su	Agn	Fnd	Pur
ROUTINE	122 E JEFFERSON STRE 08:00	Delaware County Commu 15:30	GEN	Y	Y	Y	Y				GEN	GEN	GEN
03/11/09	122 E JEFFERSON STRE 08:10	CROZER CHESTER MED 09:00	MED			A					MED	MED	MED
	CROZER CHESTER MED 11:00	122 E JEFFERSON STRE 12:00	MED			A					MED	MED	MED

Click on this button to reuse a previously entered service request and load the data into the Service Request form.

Click here to view service request history for a client.

Take: Ret: Calc Miles 0 Calc Miles 0 Last User: Last Update Time: Updated:

Pick Demand Days New Destination Map Quest: Take P/U Save Service Request **View History** Cancel

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Cancelling and Suspending Scheduled Trips

There are 2 different methods for selecting and cancelling schedule records: Cancel by Client and Cancel by Vehicle.

[Cancel by Client](#)

[Cancel by Vehicle](#)

Cancelling Scheduled Trips by Client

Select a client then click on the **"Scheduled Trips"** tab. On the trip record you want to cancel, double click in the **"Date"** field to display the Cancel-Suspend Trip window.

PtMS - Client Records
10/13/09 22:51:37
091609-1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info **Sched Trips** Trip Hx Options View Providers

T/R	E	Pickup Location	PU	Destination	Drop	D/R	Veh	Date	Day	Stop	Start
T		122 E JEFFERSON STREET	08:00	CROZER CHESTER MED CE	08:30	R	A01	ROUTINE	MON		
R		Delaware County Community	15:30	122 E JEFFERSON STREET	16:00	R	A01	ROUTINE	MON		
T		122 E JEFFERSON STREET	08:00	Delaware County Community	08:30	R	A01	ROUTINE	WED		
R		Delaware County Community	15:30	122 E JEFFERSON STREET	16:00	R	A01	ROUTINE	WED		
T		122 E JEFFERSON STREET	08:00	Delaware County Community	08:30	R	A01	ROUTINE	FRI		
R		Delaware County Community	15:30	122 E JEFFERSON STREET	16:00	R	A01	ROUTINE	FRI		

PtMS For Windows - Cancel/Suspend Trip

Client ID: 2 Trid ID: 108 Date: ROUTINE

Stop Date: 10/19/2009
Restart Date: 10/20/2009

Cx/Suspend Options

☒ This Ride Only ☐ All Rides
☐ All Routines ☐ All Demands

Apply Cx/Suspend Clear Suspension

Exit

■ = Cx/Suspended ■ = Deleted ■ = Escorts ■ = Routine Delayed Start

Client: WASHINGTON, GEORGE (2)

Double click on date to view Cx/Suspension options.

Find Client Clear Scrm Edit Client Add Client Delete Client Schedule Trip GeoCode Client CMN's Quit

The cancelled trips are displayed in red highlight along with the stop and start dates for the trip.

PtMS - Client Records
10/13/09 22:56:19
091609-1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info **Sched Trips** Trip Hx Options View Providers

T/R	E	Pickup Location	PU	Destination	Drop	D/R	Veh	Date	Day	Stop	Start
T		122 E JEFFERSON STREET	08:00	CROZER CHESTER MED CE	08:30	R	A01	ROUTINE	MON	10/19/2009	10/20/2009
R		Delaware County Community	15:30	122 E JEFFERSON STREET	16:00	R	A01	ROUTINE	MON		
T		122 E JEFFERSON STREET	08:00	Delaware County Community	08:30	R	A01	ROUTINE	WED		
R		Delaware County Community	15:30	122 E JEFFERSON STREET	16:00	R	A01	ROUTINE	WED		
T		122 E JEFFERSON STREET	08:00	Delaware County Community	08:30	R	A01	ROUTINE	FRI		
R		Delaware County Community	15:30	122 E JEFFERSON STREET	16:00	R	A01	ROUTINE	FRI		

■ = Cx/Suspended ■ = Deleted ■ = Escorts ■ = Routine Delayed Start

Client: WASHINGTON, GEORGE (2)

Refresh Print Trips

Double click on date to view Cx/Suspension options.

[Return to Cancel topic](#)
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Cancelling Scheduled Trips by Vehicle

Select the Options tab, the select Vehicle Manifest Edit to view schedules by Vehicle for a schedule date. To cancel a record select **"Cancel"** from the **"Cancel/Noshow"** column.

VEHICLE MANIFEST SUMMARY

Date: 10/14/2009 Wed ☐ Filter Vehicle: Filter Ride Type: All Sort Trips By: Pickup, Drop Times Providers Refresh Assign Drivers

Cx NS	Vehicle	Driver	Sched Times		Last Name	First Name	D/R	T/R	Status	Pickup Location	Destination	Miles	WC	Agn
			Pickup	Drop										
	A01	DJS	08:00	08:30	WASHINGTON	GEORGE	R	T		122 E JEFFERSON STREET	Delaware County Community C	4	AMB	GEN
U	Unsuspend		08:20	09:00	TRUMAN					414 MEETINGHOUSE LN	CROZER CHESTER MED CEN	6.4	AMB	MED
C	Cancel		09:00	09:10	Route					Granite Run Mall	RIDDLE MEMORIAL HOSPITAL	1	AMB	GEN
N	NoShow		09:15	09:25	Route					RIDDLE MEMORIAL HOSPITAL	Media Post Office	3	AMB	GEN
	F1A		09:30	09:35	Route					Media Post Office	Springfield Mall	2	AMB	GEN
	F1A		09:40	09:45	Route					Springfield Mall	SPRINGFIELD HOSPITAL	1	AMB	GEN
	F1A		09:50	09:55	Route	Fixed	R	T		SPRINGFIELD HOSPITAL	Healthplex Sports Club	1	AMB	GEN
	F1A		10:00	10:10	Route	Fixed	R	T		Healthplex Sports Club	Lawrence Park Shopping Cente	3	AMB	GEN
	F1A		10:15	10:25	Route	Fixed	R	T		Lawrence Park Shopping Cente	Newtown Square Shopping Cen	3	AMB	GEN
	F1A		10:30	10:35	Route	Fixed	R	T		Newtown Square Shopping Cen	Delaware County Community C	1	AMB	GEN
	EAS		10:40	10:55	Route	Fixed	R	T		Delaware County Community C	Granite Run Mall	4	AMB	GEN
	A01	DJS	11:00	11:45	TRUMAN	HARRY	R	R		CROZER CHESTER MED CEN	414 MEETINGHOUSE LN	6.4	AMB	MED
	A01	DJS	15:30	16:00	WASHINGTON	GEORGE	R	R		Delaware County Community C	122 E JEFFERSON STREET	4	AMB	GEN

Close Map All Trips 999 999 999 999 999 999 Search - Last: , First: ☒ Use Status Desc

After cancelling the record the user is prompted to enter the "Reason for Cancellation".

PtMS For Windows - Vehicle Manifest Summary

VEHICLE MANIFEST SUMMARY

Date: 10/14/2009 Wed ☐ Filter Vehicle: Filter Ride Type: All Sort Trips By: Pickup, Drop Times Providers Refresh Assign Drivers

Cx NS	Vehicle	Driver	Sched Times		Last Name	First Name	D/R	T/R	Status	Pickup Location	Destination	Miles	WC	Agn
			Pickup	Drop										
	A01	DJS	08:00	08:30	WASHINGTON	GEORGE	R	T	C	122 E JEFFERSON STREET	Delaware County Community C	4	AMB	GEN
	A01	DJS	08:20	09:00	TRUMAN	HARRY	R			CROZER CHESTER MED CEN	6.4	AMB	MED	
	F1A		09:00	09:10	Route	Fixed	R			RIDDLE MEMORIAL HOSPITAL	1	AMB	GEN	
	F1A		09:15	09:25	Route	Fixed	R			Media Post Office	3	AMB	GEN	
	F1A				Route	Fixed	R			Springfield Mall	2	AMB	GEN	
	F1A				Route	Fixed	R			SPRINGFIELD HOSPITAL	1	AMB	GEN	
	F1A				Route	Fixed	R			Healthplex Sports Club	1	AMB	GEN	
	F1A				Route	Fixed	R			Lawrence Park Shopping Cente	3	AMB	GEN	
	F1A				Route	Fixed	R			Newtown Square Shopping Cen	3	AMB	GEN	
	F1A		10:30	10:35	Route	Fixed	R			Delaware County Community C	1	AMB	GEN	
	EAS		10:40	10:55	Route	Fixed	R			Granite Run Mall	4	AMB	GEN	
	A01	DJS	11:00	11:45	TRUMAN	HARRY	R			414 MEETINGHOUSE LN	6.4	AMB	MED	
	A01	DJS	15:30	16:00	WASHINGTON	GEORGE	R			122 E JEFFERSON STREET	4	AMB	GEN	

Close Map All Trips 999 999 999 999 999 999 Search - Last: , First: ☒ Use Status Desc

Reason For Cancellation

- Client Canceled
- Doctor Canceled
- Client Canceled
- Family Canceled
- Client Moved
- Client Moved Out of Co

Close

Cancelled trip records are removed from the list of "All Scheduled Trips" once the screen is refreshed. To view all cancelled trips for a schedule date you must select cancelled and noshow trips from the "Filter by Ride Type" selection box.

PtMS For Windows - Vehicle Manifest Summary

VEHICLE MANIFEST SUMMARY

Date: 10/14/2009 Wed ☐ Filter Vehicle: Filter Ride Type: Cx/NS Sort Trips By: Pickup, Drop Times Providers Refresh Assign Drivers

Cx	Vehicle	Driver	Sched Times Pickup Drop	Last Name	First Name	DI	us	Pickup Location	Destination	Miles	WC	Agn
NS	A01	DJS	08:00 08:30	WASHINGTON	GEORGE	R	Deleted	122 E JEFFERSON STREET	Delaware County Community C	4	AMB	GEN
Cx/NS												

Select "Cx/NS" from the "Filter Ride Type" selection box to display only trips marked cancelled or noshow.

Close Map All Trips 999 999 999 999 999 999 Search - Last: , First: Use Status Desc

[Return to Cancel topic](#)

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Deleting Scheduled Trips

To delete a scheduled trip for a client select the "Scheduled Trips" tab on the client record.

Click on the "Edit Trip Detail" button for the trip you want to edit and display the trip detail screen.

PtMS - Client Records

10/11/09 08:43:49
091609-1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info **Sched Trips** Trip Hx Options View Providers

T/R	E	Pickup Location	PU	Destination	Drop	D/R	Veh	Date	Day	Stop	Start
T		122 E JEFFERSON STREET	08:15	Delaware County Community	08:45	R	A01	ROUTINE	MON		
R		Delaware County Community	15:15	122 E JEFFERSON STREET	15:45	R	A01	ROUTINE	MON		
T		122 E JEFFERSON STREET	08:15	Delaware County Community	08:45	R	A01	ROUTINE	TUE		
R		Delaware County Community	15:15	122 E JEFFERSON STREET	15:45	R	A01	ROUTINE	TUE		
T		122 E JEFFERSON STREET	08:15	Delaware County Community	08:45	R	A01	ROUTINE	WED		
R		Delaware County Community	15:15	122 E JEFFERSON STREET	15:45	R	A01	ROUTINE	WED		
T		122 E JEFFERSON STREET	08:15	Delaware County Community	08:45	R	A01	ROUTINE	THU		
R		Delaware County Community	15:15	122 E JEFFERSON STREET	15:45	R	A01	ROUTINE	THU		
T		122 E JEFFERSON STREET	08:15	Delaware County Community	08:45	R	A01	ROUTINE	FRI		
R		Delaware County Community	15:15	122 E JEFFERSON STREET	15:45	R	A01	ROUTINE	FRI		

Click to select the trip detail screen for the trip to delete

☐ = Cx/Suspended
 ☐ = Deleted
 ☐ = Escorts
 ☐ = Routine Delayed Start
 Refresh Print Trips

Client: WASHINGTON,GEORGE (2) Double click on date to view Cx/Suspension options.

Find Client Clear Scrn Edit Client Add Client Schedule Trip GeoCode Client CMN's Quit

On the trip detail screen, click on the down arrow on the status field to display the list of options and select "D" for delete record. Click "Save Changes" to update the record and flag it for deletion.

PtMS - Client Records
10/11/09 08:46:05
091609-1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info **Sched Trips** Trip Hx Options View Providers

Vehicle Manifest Trip Edit for >>WASHINGTON, GEORGE (2) - Trip ID:82 - Date:ROUTINE

Vehicle: A01 Day: WED 3 Client ID: 2 Prov: Take Or Return: T Trip ID: 82
 Last Name: WASHINGTON First Name: GEORGE Updated: 10/11/2009 08:31 Demo User
 Date: ROUTINE Trip Code: GEN Fare: 2 Amb Status: AMB
 Agency: GEN Funding: GEN Purpose: GEN Stop Date: Start Date:
 Pickup: 122 E JEFFERSON STREET Time: 08:15 Zone: 498500 Loc: 19063,MEDIA X: 1205673326
 Dest: Delaware County Community College Time: 08:45 Zone: 533487 Loc: 19063,MEDIA Y: 1034836020
 X: 1205423927
 Y: 1035539204

Drv Instr: Run:
 Req Date: Def Vehicle: A01 Def Pickup Time: 08:45 Def Drop Time: 08:15
 Pickup Address: Destin Address:
 Escort: Escort Status: Status Desc: Miles: 4 Modifier:
 Ref Number: Ref Start: 10/11 Ref End: 10/11/2009 Renew
 Notes: Client Comment:

Close Save Changes UnSuspend Delete Trip Calc Miles

Find Client Clear Scrn Edit Client Add Client Schedule Trip GeoCode Client CMN's Quit

Changing the status of the record to "Deleted" instantly removes the trip record from the schedule. It will not appear on printed lists or browses of active scheduled trips. The daily processing routine for PtMS - System Processing - will remove it from the schedule. If you decide you need to restore the trip, simply edit the status field to blank an "Save Changes" again.

Deleted trip records appear in the client's "Scheduled Trips" display color coded black until System Processing removes them from the Schedule table.

PtMS - Client Records
10/11/09 08:55:46
091609-1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info **Sched Trips** Trip Hx Options View Providers

T/R	E	Pickup Location	PU	Destination	Drop	D/R	Veh	Date	Day	Stop	Start
T		122 E JEFFERSON STREET	08:15	Delaware County Community	08:45	R	A01	ROUTINE	MON		
R		Delaware County Community	15:15	122 E JEFFERSON STREET	15:45	R	A01	ROUTINE	MON		
T		122 E JEFFERSON STREET	08:15	Delaware County Community	08:45	R	A01	ROUTINE	TUE		
R		Delaware County Community	15:45		15:45	R	A01	ROUTINE	TUE		
T		122 E JEFFERSON STREET	08:15	Delaware County Community	08:45	R	A01	ROUTINE	WED		
R		Delaware County Community	15:45		15:45	R	A01	ROUTINE	WED		
T		122 E JEFFERSON STREET	08:15	Delaware County Community	08:45	R	A01	ROUTINE	THU		
R		Delaware County Community	15:45		15:45	R	A01	ROUTINE	THU		
T		122 E JEFFERSON STREET	08:15	Delaware County Community	08:45	R	A01	ROUTINE	FRI		
R		Delaware County Community	15:15	122 E JEFFERSON STREET	15:45	R	A01	ROUTINE	FRI		

Deleted Trip - tagged for permanent removal from Schedule table. Delete status removes the trip from all active schedules and reports.

■ = Cx/Suspended
 ■ = Deleted
 ■ = Escorts
 ■ = Routine Delayed Start
 Refresh Print Trips

Client: WASHINGTON, GEORGE (2) Double click on date to view Cx/Suspension options.

Find Client Clear Scrn Edit Client Add Client Schedule Trip GeoCode Client CMN's Quit

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Editing Schedules

Editing Schedules primarily refers to adjusting scheduled trip pickup times, drop-off times, and vehicle assignment. Other fields such as destination, mileage, etc can be edited using the Schedule Record Detail window.

Editing Scheduled Trips for a Client

To edit schedule records for a client, select the **"Scheduled Trips"** tab on the client record to display all scheduled trips for a client. Click on the detail icon on the far right column to open the scheduled trip detail window.

PtMS - Client Records
10/13/09 21:17:26
091609-1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info **Sched Trips** Trip Hx Options View Providers

T/R	E	Pickup Location	PU	Destination	Drop	D/R	Veh	Date	Day	Stop	Start
T		122 E JEFFERSON STREET	08:00	CROZER CHESTER MED CE	08:30	R	A01	ROUTINE	MON		
R		Delaware County Community	15:30	122 E JEFFERSON STREET	16:00	R	A01	ROUTINE	MON		
T		122 E JEFFERSON STREET	08:00	Delaware County Community	08:30	R					
R		Delaware County Community	15:30	122 E JEFFERSON STREET	16:00	R					
T		122 E JEFFERSON STREET	08:00	Delaware County Community	08:30	R					
R		Delaware County Community	15:30	122 E JEFFERSON STREET	16:00	R					

Select the trip to edit by clicking on the trip detail button. This opens a trip detail edit window.

■ = Cx/Suspended ■ = Deleted ■ = Escorts ■ = Routine Delayed Start

Refresh Print Trips

Client: WASHINGTON, GEORGE (2) Double click on date to view Cx/Suspension options.

Find Client Clear Scrn Edit Client Add Client Delete Client Schedule Trip GeoCode Client CMN's Quit

Edit the fields needed and click on the **"Save Changes"** button to save edits made to the schedule record.

PtMS - Client Records
10/13/09 21:21:47
091609-1400

PtMS For Windows - Clients

Client Info Client Billing Emerg Info /Certs Agency Billing Pickup Info **Sched Trips** Trip Hx Options View Providers

Vehicle Manifest Trip Edit for >>WASHINGTON, GEORGE (2) - Trip ID:112 - Date:ROUTINE

Vehicle: A01 Day: FRI 5 Client ID: 2 Prov: Take Or Return: T Trip ID: 112

Last Name: WASHINGTON First Name: GEORGE Updated: 10/12/2009 10:21 Demo User

Date: ROUTINE Trip Code: GEN Fare: 2 Amb Status: AMB

Agency: GEN Funding: GEN Purpose: GEN Stop Date: Start Date:

Pickup: 122 E JEFFERSON STREET Time: 08:00 Zone: 498500 Loc: 19063,MEDIA X: 1205673321 Y: 1034834132

Dest: Delaware County Community College Time: 08:30 Zone: 533487 Loc: 19063,MEDIA X: 1205423927 Y: 1035539204

Drv Instr: Assist client on and off vehicle Run:

Req Date: Req Time: Vehicle: A01 Def Pickup Time: 08:00 Def Drop Time: 08:30

Pickup Address: Destin Address: Escort: Escort Fare: Status Desc: Miles: 4 Modifier:

Ref Number: 009 Ref End: 10/12/2009 Renew

Notes: Client Comment:

Close Save Changes UnSuspend Delete Trip Calc Miles

Find Client Clear Scrn Edit Client Add Client Delete Client Schedule Trip GeoCode Client CMN's Quit

Editing Scheduled Trips for a Vehicle(s)

To edit scheduled trips for a vehicle select the "Options" tab and select "Edit Vehicle Manifest" to display the "Vehicle Manifest Summary" window. This window allows users to display and edit vehicles, pickup and drop-off times for schedule records displayed on the screen. Users can select trips for schedule date, all vehicles or selected vehicles, one - a group - or all providers, or filter trips by trip type (all scheduled trips, demands, routines, or cancelled/noshow trips).

PtMS For Windows - Vehicle Manifest Summary

VEHICLE MANIFEST SUMMARY

Date: 10/14/2009 Wed ☒ Filter Vehicle: A01 Filter Ride Type: All Sort Trips By: Pickup, Drop Times Providers Refresh Assign Drivers

Cx NS	Vehicle	Driver	Sched Times		Last Name	First Name	D/R	T/R	Status	Pickup Location	Destination	Miles	WC	Agn
			Pickup	Drop										
	A01	DJS	08:00	08:30	WASHINGTON	GEORGE	R	T		122 E JEFFERSON STREET	Delaware County Community C	4	AMB	GEN
	A01	DJS	08:20	09:00	TRUMAN	HARRY	R	T		414 MEETINGHOUSE LN	CROZER CHESTER MED CEN	6.4	AMB	MED
	A01	DJS	11:00	11:45	TRUMAN	HARRY	R	R		CROZER CHESTER MED CEN	414 MEETINGHOUSE LN	6.4	AMB	MED
	A01	DJS	15:30	16:00	WASHINGTON	GEORGE	R	R		Delaware County Community C	122 E JEFFERSON STREET	4	AMB	GEN

These fields are editable on this screen.

Close Map All Trips 999 999 999 999 999 A01 Search - Last: , First: Use Status Desc

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Printing Schedules

To print a schedule select the Options tab then select **"Vehicle Manifest Edit"** to display the **"Vehicle Manifest Summary"** screen for editing and printing schedules for selected trip dates.

Make your schedule record selections and display sort selections these include:

Schedule Record Selection and Display Options

- **Schedule Date**
- **Filter by Vehicle** or All Vehicles
- **Filter Ride Type** (Demands, Routines, Cancels/Noshows, Deleted, or ALL Scheduled Trips)
- **Sort Trips By** (Pickup+Drop Time, Client Name, Pickup Location, Destination, Agency)

Next, select the "Print" button to print the schedule. A dialogue box will ask if you want your trips printed grouped by vehicle. When printing trips for all vehicles this option is typically selected.

PtMS For Windows - Vehicle Manifest Summary

VEHICLE MANIFEST SUMMARY

Date: 10/12/2009 Mon ☒ Filter Vehicle: A01 Filter Ride Type: All Sort Trips By: Pickup, Drop Times Providers Refresh Assign Drivers

Cx NS	Vehicle	Driver	Sched Times		Last Name	First Name	D/R	T/R	Status	Pickup Location	Destination	Miles	WC	Agn
			Pickup	Drop										
	A01		08:00	08:45	CARTER	JIMMY	R	T		581 SOUTH AVE	Delaware County Community C	5	AMB	GEN
	A01		08:15	08:45	WASHINGTON	GEORGE	R	T		122 E JEFFERSON STREET	Delaware County Community C	4	AMB	GEN
	A01		15:15	15:45	WASHINGTON	GEORGE	R	R		Delaware County Community C	122 E JEFFERSON STREET	4	AMB	GEN
	A01		15:15	16:00	CARTER	JIMMY	R	R		Delaware County Community C	581 SOUTH AVE	5	AMB	GEN

Vehicle Manifest Report Style

Do You Want To Group By Vehicle?

Yes No

Click on the Print button and select whether to group trips by vehicle - if you selected no, trip trips will print as one long list sorted by the sort selection at the top.

Close Map All Trips 999 999 999 999 999 A01 Search - Last: , First: Use Status Desc

The schedule report will display as a print preview. Click on the print button and make your printer selections, then select OK to print.

Vehicle Manifest Summary - Grouped By Vehicle											
Veh:A01, All Rides, Sorted By Pickup/Drop Times For Monday 10/12/09											
A01											
CARTER, JIMMY				R	T	08:00	581 SOUTH AVE	08:45	Delaware County Commu	5	AMB GEN GEN
Client requires assistance boarding vehicle							MEDIA,PA,19063		PA,19063		
Med ID: , Reference #: Clt Phn:(555)211-1122											
WASHINGTON, GEORGE				R	T	08:15	122 E JEFFERSON STRE	08:45	Delaware County Commu	4	AMB GEN GEN
							MEDIA,PA,19063		PA,19063		
Med ID: , Reference #: Clt Phn:											
WASHINGTON, GEORGE				R	R	15:15	Delaware County Commu	15:45	122 E JEFFERSON STRE	4	AMB GEN GEN
							MEDIA,PA,19063		MEDIA,PA,19063		
Med ID: , Reference #: Clt Phn:											
CARTER, JIMMY				R	R	15:15	Delaware County Commu	16:00	581 SOUTH AVE	5	AMB GEN GEN
Client requires assistance boarding vehicle							MEDIA,PA,19063		MEDIA,PA,19063		
Med ID: , Reference #: Clt Phn:(555)211-1122											

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