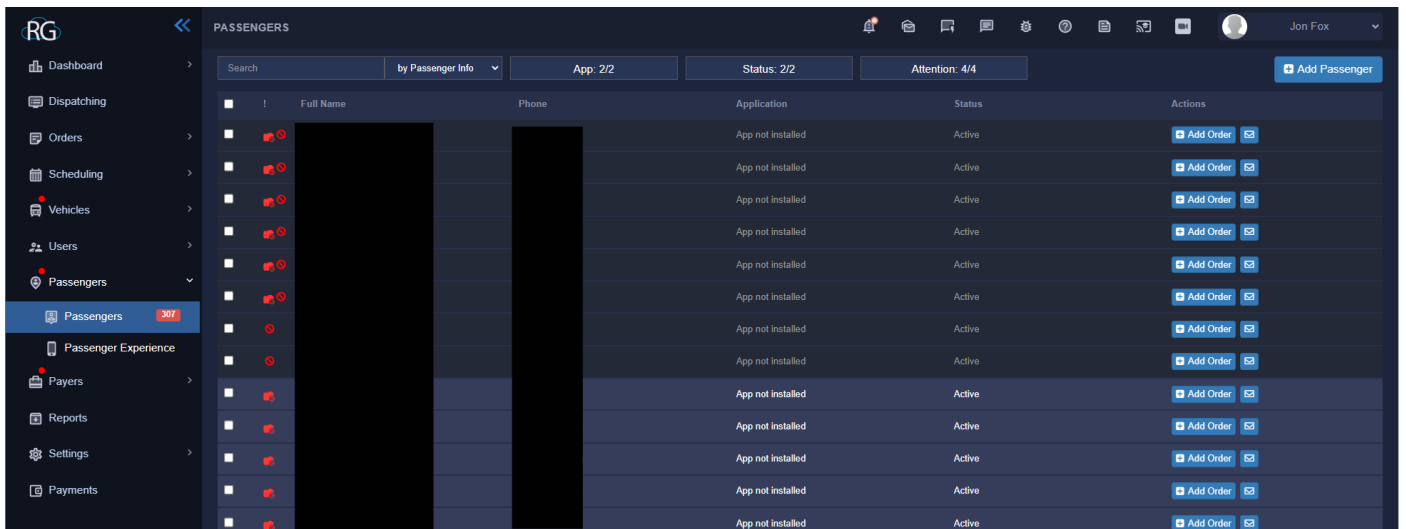


Looking At Clients In RG

Client Overview

The next object we will take a look inside of RG will be clients, The ongoing Client log is found in the Passengers interface:



The screenshot shows the 'RG' dashboard with the 'PASSENGERS' section active. The left sidebar contains navigation links: Dashboard, Dispatching, Orders, Scheduling, Vehicles, Users, Passengers (highlighted with a '307' badge), Passenger Experience, Payers, Reports, Settings, and Payments. The main area displays a table of passengers with columns for Full Name, Phone, Application, Status, and Actions. The 'Full Name' and 'Phone' columns are redacted with black boxes. The 'Application' column shows 'App not installed' for all entries, and the 'Status' column shows 'Active'. Each row has an 'Add Order' button and a message icon. At the top of the table, there are filters for 'by Passenger Info', 'App: 2/2', 'Status: 2/2', and 'Attention: 4/4', along with an 'Add Passenger' button.

Full Name	Phone	Application	Status	Actions
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message
[Redacted]	[Redacted]	App not installed	Active	Add Order Message

Taking a look at the passenger interface it is pretty straight forward, it provides a list of passengers along with some **PII** and the ability to quickly add an order or message them.

Ignore the black boxes, they are just protecting client **PII** ... without that black boxes you would see passenger names in the first column and phone numbers in the next.

Expanded Client View

As with any of the other similar interfaces we have covered we can click on any given passenger and expand their profile for some more options and settings. Something to keep in mind here is that passengers should be viewed as an object within the system. They are created in this interface and can then be used through out the website. This log is your database and you can access from the other interfaces as needed.

*Info
Custom Fields
Duplicates
Authorizations
Passenger Credit
Drivers Blacklist
Driver Groups Blacklist
Passengers blacklist
Files

INFO

Personal Information

Internal member ID

200

*First Name

*Last Name

Birthday

05/17/1997

Age

29

Gender

Other

Weight, lbs

0

Social Security Number

Social Security Number

Race

Diabetic Status

None

Preferred Language

English

Contacts

*Phone #1

Phone #2

() - -

Email

Email

Automated Calling System

Automated Text Message Status

Text Message Consent Status

Need to Request Consent

Review Module Status

Opt-Out

Driver Group

Group

Driver Group

Emergency Contact

Phone

Phone #1

Name

Name

Address

Address #1

County: Sheboygan

Facility

Facility

Floor

Floor

Room

Room

Bed

Bed

Apt/Su...

Apt/Sl

Stairs ...

0

Address #2

Address #2

Facility

Facility

Floor

Floor

Room

Room

Bed

Bed

Apt/Su...

Apt/Sl

Stairs ...

0

Passenger Preferences

Favorite Vehicle

Vehicle ID

Favorite Driver

Driver ID

Preferred Mode

Ambulatory - Non-Medical (RI)

Other Requirements

Other Requirements

Ride Alone

Need Attendant

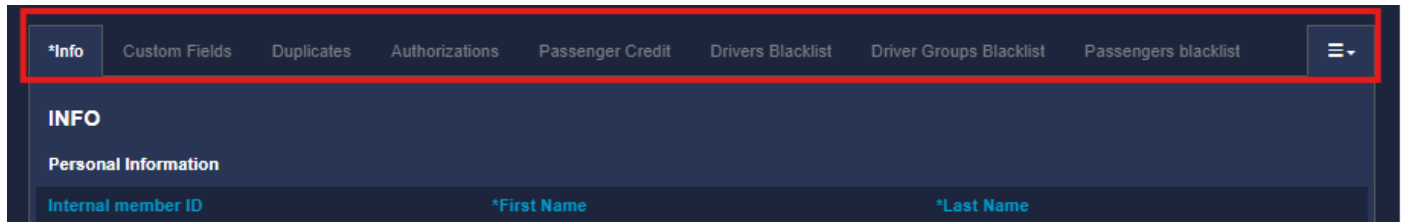
Auto calculation PU Time for will call

Same Gender Requirement

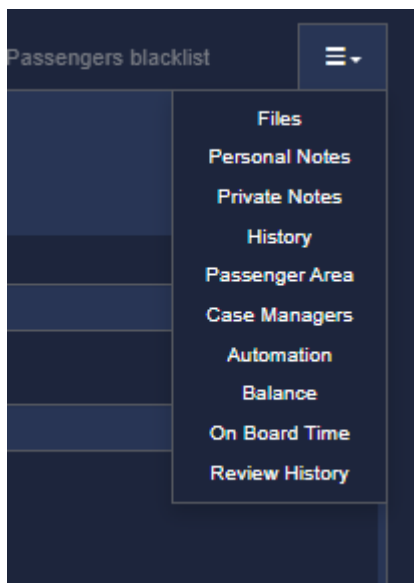
Wait on Return

As you can see from the screenshot above passengers come with a pretty wide range of settings and options to help us insure that they operate the way we need them to inside our system. I cant even fit the whole window inside a screenshot. We are not going to deep dive on client information

here but lets take a look at the tabs that represent some of the options available for manipulating a passenger profile.



Outlined in red (shown above) are all the options available on a user profile. You will notice a box all the way at the end with a drop down symbol, this actually allows us to see all the other options that did not fit, this will vary depending on your screen size. Clicking it will expand the drop down.



We will start out going from left to right:

Custom Fields

An expansion of the main info page, some other fields are available to use including "Billing Frequency", billing frequency MUST be set to make any other changes after the passenger is created.

Duplicates

Any duplicate passengers will be listed here so that you can easily remove them.

Authorizations

Lists the payer or payers that passenger is using. Payers can also be added to their profile here.

Passenger Credit

A place where we can store credit card information for a passenger, we do not actively use this at Lakeshore as our billing is done through Quick Books.

Drivers Blacklist

Putting a driver on this list for a passenger will ensure that the passenger can not be paired with the driver. This is generally used when there is a problem between the two.

Driver Group Blacklist

The same thing as a Driver Blacklist but instead aimed at an entire driver group, we dont utilize driver groups at Lakeshore so it is of no use to you.

Passenger Blacklist

This blacklist is for other passengers, it will keep them from being multiloaded together.

Files

A quick place to store specific files for a passenger so that you can have quick, related access to them. Signatures will also be stored here.

Personal Notes

A place for the team to add personal notes about a client that they think other drivers, dispatchers or admin will need to know.

Private Notes

The same thing as notes except they are private!

History

A system history of actions being taken on a Passenger object ... these actions will have a brief description and be tied to a user or internal user along with a timestamp.

Passenger Area

Information from feedback in the customer app can be seen here however Lakeshore is not currently utilizing the passenger app.

Case Managers

Information for a clients case manager(s) can be stored here. A case manger generally oversees the client and their trips as they pertain to the payer.

Automation

This allows us to automate the adding of trips in to the system for a passenger although i believe there is not much use for it as creating a standing order works better and it is much easier to manage. If i do find a use case for this I will come back and make an edit.

Balance

If a client carries a balance it will appear here but again we do not use RG for our billing.

On Board Time

For tracking the amount of time a passenger is in a vehicle, this is not enabled by default.

Review History

A history of reviews/ratings a passenger has given from the passenger app, but again, Lakeshore is not actively utilizing this.

Revision #3

Created 2026-07-28 23:43:45 UTC by jonny

Updated 2026-07-29 17:45:39 UTC by jonny