

Recording A Trip From A Phone Call (Video Lesson)

Booking Trips Over The Phone

This Guide will assume basic knowledge of RouteGenie and that you have set up your work accounts for both Gmail and RouteGenie

One of the most common ways we record trips at lakeshore is over the phone.

When a client calls in with a ride request we generally do not enter it directly in to RouteGenie for multiple reasons, The main one being that it is simply more complicated and prone to error. When we first started out we all had our own way of taking trips down with our personal preference of notepad be it digital or physical. The problem with this is we end up losing trips to human error.

This may not seem like a big deal but if everyone forgets to enter in one or two trips a week it starts to add up pretty quick.

The Solution

We created a form to be filled out that records the trips in to a log. This form provides us with a simple way to take down trip information and it also keeps track of them in a log making it easy to ensure they were entered as well as making it easy to review them later. No more forgotten entries and mistakes can easily be reviewed.

[The Form](#)

[The Log](#)

The links above will bring you to the form we fill out when we are on the phone with clients as well as the log that we use to keep track of trips.

The Process

In the video below we take a look at filling out the form:

<https://www.youtube.com/embed/WSH79tT6qfE>

When someone calls in we simply fill out the form asking the client the questions in the order that they appear. We generally try to fill out as many of these boxes as we can especially if the customer is new, for new clients it is extremely important to get all that information the form asks for and then some.

Payer Information For New Clients

When you take down the payer information for a new client it is not enough to get just the payer name. In the same box include the case workers name, phone number, and email. If there is no caseworker make sure to get a point of contact and their phone number incase any billing issues arise.

Getting Quotes

Clients both new and old will often want quotes and providing one is simple as there is a calculator that I made.

Github Repo for Calculator and Link to Calculator:

[Github Repository](#)

[Pricing Calculator](#)

We use this calculator to provide quotes to the client. Well, we call it a quote but generally if you did it right it should be exactly what the client will be paying, in fact, we should do our best to avoid giving clients an estimate as it causes nothing but issues.

Using the Pricing Calculator

In this video below I will explain how the pricing calculator works:

https://www.youtube.com/embed/whVyB_78f_c

After getting a quote for the client with the calculator and giving it to them make sure that you then head over to slack and post it in the billing channel. Make sure to tag either channel or one of the admins that work on billing and include in the message what client and trip the quote is for. Alternatively we also share **NEW** client info in the exact same way often combining the two.

Entering the Trip Into RouteGenie

Finally after we have gathered all the trip information there is to gather we are going to enter the trip into RouteGenie.

Developing your workflow

Everyone will do it differently, some people will enter the trip into RG right away while others will let them pile up in the log before they get to them. Lets take a look at the trip log below:

894	2026-07-29 13:09	yes	Jonny		No	My Choice Wisconsin	Ambulatory Medical (RD) New Single Ric
895	2026-07-29 16:32	yes	Jonny		No	Community care	Ambulatory Medical (RD) New Single Ric
896	2026-07-29 17:09	yes	Jonny		No	Community care	Ambulatory Medical (RD) New Single Ric
897	2026-07-30 16:20	working on jon	Jonny		No	My Choice Wisconsin	Ambulatory Medical (RD) New Single Ric
898	2026-07-30 16:22	No	Jonny		No	My Choice Wisconsin	Ambulatory Medical (RD) New Single Ric
899	2026-07-30 17:16	No	Jonny		No	Community care	Ambulatory Medical (RD) New Single Ric
900	2026-07-30 17:18	No	Jonny		No		Ambulatory Medical (RD) New Single Ric
901	2026-07-30 19:10	No	Jonny		No	Community care	Wheelchair Medical (RD) New Single Ric
902	2026-07-30 21:23	No	Jonny		Yes	Private Pay	Ambulatory Medical (RD) New Single Ric
903							
904							
905							
906							
907							
908							
909							

After you submit your trip from the form this is where they end up, The black box is just protecting client names. The important thing I wanted to point out is the second column. This column will change color depending on what text has been entered in the cell, while a default entry will be made based on the first question in the form you can also simply enter text by double clicking on the form and typing it, it is not case sensitive and the "working on" text can include anything else but will highlight blue so long as those letters are included. If your are working on a row you simply type "working on insert name".

Yes - The trip has been entered in to RouteGenie

No - The trip has not yet been entered in to RouteGenie

Working On - This phrase is normally followed by an employee name and it means what it says, **X** employee is currently working on entering the trip.

It is ok to not enter your trips right away either, sometimes we help each other out and sometimes someone just turns through 10 of them at once. Like I said, you will develop your own workflow.

From Form to Genie

When it has finally come time to enter them in to the system there are a few ways we can go about it. In the video below we will take a look at all the different options to get to the trip entry interface inside of RouteGenie, there are more than a few:

https://www.youtube.com/embed/l_m832Vbnmg

As shown in the above video we have quote a few options to enter trips. As talked about in other articles it is important to remember that it does not matter how a trip is entered in to the system, it is all one in the same. Entering the trip in to RouteGenie creates an object that can be used all throughout RouteGenie.

Add Order Interface

Regardless of what section you click "Add Order" in, aside from using "Trip Import", you will find that the interface is one in the same.

The screenshot shows the 'Add Order' form in RouteGenie. It has a dark theme and is organized into several sections:

- Payer Information:** Includes a 'Payer ID' field with a red border and a 'This field is required' error message.
- Passenger Information:** Includes fields for 'Last Name', 'First Name', 'DOB (MM/DD/YYYY)', and 'Age'. There are also 'Phone' and 'Email' fields.
- Order Information:** Includes fields for 'PU Address', 'Facility', 'DO Address', 'Mode', 'Seats', 'Will Call', and 'Need Attendant'. There are also dropdown menus for 'Floor', 'Room', 'Bed', 'Apt/Suite', and 'Stairs'.
- ORDER ITEMS:** A table with columns for 'Floor', 'Room', 'Bed', 'Apt/Suite', and 'Stairs'. There is an 'Add order item' button.
- Notes:** A text area for 'Dispatch notes'.

As you fill out cells in this interface a dropdown menu will auto populate with options based on what you have typed. Remember that even if you can type the full entry yourself from memory you must always select the option from the drop down instead of simply typing it yourself.

You can only type it yourself if it is 100% new to the system otherwise you will encounter an error.

It is a strange feature but you will find that it happens regularly across RouteGenie. In fact its one of the few constants you can rely on in this system. The positive thing about it is that it keeps typos from happening is they for the most part just simply cant. This in combination with our form really brings us up to a pretty solid number on correct entries with only a few incorrect ones escaping every once in a while.

B Leg Entry

After the first part of the trip has been entered and we need to enter the B-leg just click on the box outline in red (shown below).

The screenshot shows the 'Add Order' form in RouteGenie. The form is divided into several sections:

- Payer Information:** Includes fields for Payer ID (Community Care), Last Name (FAKE), First Name (FAKE), DOB (07/07/1977), Age (49), Phone ((777) 777-7777), Member ID (7777), Weight (0 lbs), and Gender (Male).
- Order Information:** Includes Night route pricing (Total price: \$1,798.88, Distance: 636.00 miles, Load Fee: \$23.00, Mileage price: \$1,494.60), PU Address (123 Heaven Hill Ln, Pickens, SC), DO Address (456 Fakes Ave, Dyersburg, TN), Mode (Ambulatory - Med), Seats (1), Will Call (Yes/No), Need Attendant (Yes/No), No Multiload (Yes/No), Pick Up Date (07/08/2026), Pick Up Time (14:00), and Appointment Time (HH/MM).
- ORDER ITEMS:** Includes a section for Notes and Dispatch notes.

A red arrow points to a green button labeled 'Round Trip' in the bottom right corner of the form.

Then the trip window will expand the address fields will auto populate in reverse and you can enter the return ride. If you need to add any more legs and you would prefer to group them all together you can repeat the task, although this time (and every time after) the green box will say "Add Extra Leg" (shown below).

Submitting Trip

After all is said and done and the trips have been entered in we can finally focus on the cluster of buttons on the bottom.

Save



This will simply save your trip in the system, after doing this your trip has no become an object that can be accessed throughout RouteGenie.

Create Standing Order



Creating a standing order is far beyond the scop of this conversation so we will not deep dive on it here but it allows you to repeat an order for as many days as you would like for as long as you would like. This provides a quick way to do that as soon as you have entered the initial trip in. Clicking this will also first save your trip in the system, before opening the standing order interface.

Alternatively this can be used as a hack to quickly copy identical trips.

Save & Hold



Saves the Order/Trip but places it on Hold, this can be used when a client wants to schedule a trip but is not 100% sure what they will need.