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| **Workflow and Process Planning** | | |
| Question to think about | Internal Notes | Ideas Uber Health has seen work well |
| Who is eligible for rides? Who identifies the need? |  | * Utilize your existing transportation or taxi voucher policy * Intercept appointment cancellations and ask if transportation was the reason |
| Who schedules rides? Does this differ day and night? |  | * If you have front door staff, send patients downstairs with a voucher for a ride with Uber or note it in their EHR * Set up security agents as coordinators if you don’t have front-door staff 24/7 |
| What types of rides do they schedule? |  | Discharge   * If you’re requesting from the lobby, use **on-demand** rides. * If you’re requesting from a higher floor, use **flexible** or schedule ahead by 30 minutes   Outpatient   * Select **scheduled** or **flexible** ride options to help people get to their appointments * Use **on-demand** or **flexible** to help them get home |
| What is the communication to the rider? |  | * Make sure riders get the [safety handout](http://uberhealth.com/downloads) * For riders without cell phones, use a [post-it note](http://uberhealth.com/downloads) * Make sure your rider knows who to call if there is an issue |
| Does anyone physically help the rider find their vehicle? |  | * Train and leverage valet teams to help riders find their vehicles |

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| **Billing and Administrative Controls** | | |
| Question to think about | Internal Notes | Ideas Uber Health has seen work well |
| Who will have permission to add and  remove coordinators? |  | * Assign one Admin per department to be responsible for managing their own coordinators |
| How will you allocate spend? |  | We’ve seen 3 ways of doing this:   1. If you want a **separate credit card** for different department: create each department with a separate account. Staff can toggle between them if needed. 2. For a single payment method where staff work in different departments, utilize the **group** feature to assign coordinators to groups. The Group will show in the CSV. 3. For a single payment method where staff work between departments, you can utilize the **internal note** to indicate the cost center or department. |
| What should coordinators put in the internal note? |  | * Cost Center numbers, MRNs, names of ride approvers |