|  |
| --- |
| **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
 |

|  |
| --- |
| **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
 |