

# Monitoring Client Trip Quotas with PtMS for Windows

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## Summary:

PtMS support setting trip quotas for individual clients in the client record. These quotas will be automatically monitored by PtMS during the order taking (Service Request) process. PtMS will look at the number of trips provided for the selected Service Authorization (Agency+Funding+Purpose code) in the past service history for a client plus the number of future trips scheduled within the monitoring period and warn the user if the client will exceed the trip quota authorized in the client record.

Monitoring periods can be monthly (M), calendar year (Y – January to December), or any fiscal year starting with a specific month (in this case the user enters the digit 01-12 of the starting month in the Authorization Type (AT) field in the client record).

## Setting a Trip Quota in the Client Record:

Step 1: Go to the Client Record Agency Billing Screen and select a Revenue Code line.

Step 2: Enter the trip quota amount in the “Amount Authorized” field

Step 3: Enter the Authorization Type: M=Monthly; Y=Calendar Year; 01-12 start year.

Client Records

SQL DB: ABSSERVER\ABS\ptms 061512.1720.NT

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

Select an Agency Funding Purpose code for a trip quota

Enter the Amount Authorized (26 trips per month) and Authorization Type (M=Monthly)

Preferred Provider: 1 Add Revenue

Revenue ID	Agency	Funding	Purpose	Tripcode	AS	Exp Date	Amt Auth	AT	Cur Pd	Prev Pd	Del
	CAM	CAM	DIA	WDI			26	M			⊗
	CAM	CAM	MED	MED							⊗
	CAS	MIS	MED	VSH							⊗
											⊗
											⊗

Misc: \_\_\_\_\_

## Monitoring the Trip Quota on the Service Request

The Service Request screen will automatically display the amount of scheduled for a client with a trip quota once the user selects the Revenue Code (Agency+Funding+Purpose code) from the client record that has a trip quota set.

In this example, the client has a standing order (routine trip) scheduled for Monday, Wednesday, and Friday for Dialysis.

T/R	E	Pickup Location	PU	Destination	Drop	D/R	Veh	Date	Day	S	Stop Date	Start Date	Purp	
T		400 GRIMES RD,#106 SICKLERVILLE	06:15	WINSLOW DIALYSIS,SICKLERV	06:30	R	V44	ROUTINE	MON				DIA	A C S N D V
R		WINSLOW DIALYSIS,SICKLERV	11:00	400 GRIMES RD,#106 SICKLERVILLE	11:15	R	P9	ROUTINE	MON				DIA	A C S N D V
T		400 GRIMES RD,#106 SICKLERVILLE	06:15	WINSLOW DIALYSIS,SICKLERV	06:30	R	V44	ROUTINE	WED				DIA	A C S N D V
R		WINSLOW DIALYSIS,SICKLERV	11:30	400 GRIMES RD,#106 SICKLERVILLE	12:00	R	P9	ROUTINE	WED				DIA	A C S N D V
T		400 GRIMES RD,#106 SICKLERVILLE	06:15	WINSLOW DIALYSIS,SICKLERV	06:30	R	V44	ROUTINE	FRI				DIA	A C S N D V
R		WINSLOW DIALYSIS,SICKLERV	11:15	400 GRIMES RD,#106 SICKLERVILLE	11:30	R	V56	ROUTINE	FRI				DIA	A C S N D V

The trip quota is 26 trips per month. When this revenue code is selected on the Service Request, PtMS immediately calculates the number of trips scheduled for the current month – the calendar date the Service Request is being entered (starting date July 2, 2012). Based on the trip quota, this client’s scheduled trips will use all the quota amount authorized.

PtMS For Windows - Service Request

**Service Request - Standard**      070709-1445      SQL DB: ABSSERVERABS\ptms

L. Name: hidden      F. Name: hidden      MI:      CIt ID: 28512      Med ID: N      Req #:

Ref #:      Date/Type: ROUTINE      Start On Date: 07/02/12

Take Veh: 999      Ret Veh: 999      Pick Revenue Code      Agency: CAM      Funding: CAM      Purpose: DIA

Take: Destination:      Destin Time: TBS

Pickup Place: 400 GRIMES RD,#106 SICKLERVILLE      Pickup Time: TBS      1210685553, 1033129361

Pickup Zone: 120115      Name: SICKLERVILLE      Run:      ID: 23954      Destin Time: TBS      1210685553, 1033129361

Ret: Destination: 400 GRIMES RD,#106 SICKLERVILLE      ID: 23954      Destin Time: TBS      1210685553, 1033129361

Pickup Place:      ID:      Pickup Time: TBS

Pickup Zone:      Name:      Run:      Driver Instructions:      WC: AMB      Esc:      PCA:      The amount scheduled current uses all the amount allotted in the trip quota

	M	T	W	T	F	Sa	Su	Tripcode	Rate	Fare	Calc Miles	
Take:	▼	▼	▼	▼	▼	▼	▼	WDI	\$0.00		0	
Ret:	▼	▼	▼	▼	▼	▼	▼	WDI	\$0.00		0	

Last User:      Last Update Time:      Updated:

	Inc Cx	Inc NS	Trip Quantities	Time Period	Trip Trans	Scheduled	Serv Req	Total	Allotted	Balance
	<input type="checkbox"/>	<input checked="" type="checkbox"/>		07/01/2012    07/31/2012	0	26	0	26	26	0

Cancel    Pick Demand Days    Destinations    Map: Take P/U    Save Request    View History    Capacity

If the user attempts to schedule a new trip and either tries to save the record or presses the calculate button (summation symbol) on the right of the trip quota monitoring box at the bottom of the screen, a warning will appear and the monitoring box will be highlighted in red.

PtMS For Windows - Service Request

**Service Request - Standard**      070709-1445      SQL DB: ABSSERVERABS\ptms

L. Name:       F. Name:       MI:      CIt ID: 28512      Med ID: N      Req #:

Ref #:       Date/Type: ROUTINE      Start On Date: 07/02/12

Take Veh: 999      Ret Veh: 999      Pick Revenue Code      Agency: CAM      Funding: CAM      Purpose: DIA

Take: Destination: DR ABELOW, CHERRY HILL      Destin Time: TBS      1209575109, 1035547648  
 Pickup Place: 400 GRIMES RD, #106 SICKLERVILLE      Pickup Time: TBS      1210685553, 1033129361  
 Pickup Zone: 120115      Name: SICKLERVILLE      Run:

Ret: Destination: 400 GRIMES RD, #106 SICKLERVILLE      Destin Time: TBS      1210685553, 1033129361  
 Pickup Place: DR ABELOW, CHERRY HILL      Pickup Time: TBS      1209575109, 1035547648  
 Pickup Zone: 107106      Name:      Run:

Driver Instructions:       AMB      Esc:      PCA:

**Quantity Error**

Client Has Exceeded Their Allotment!

	M	T	W	T	F	Sa	Su	Tripcode	Rate	Fare		
Take:	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	WDI	\$0.00		<input type="button" value="Calc Miles"/>	22
Ret:	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>	WDI	\$0.00		<input type="button" value="Calc Miles"/>	22

Last User:      Last Update Time:      Updated:

<input type="checkbox"/> Inc Cx	Time Period	Trip Trans	Scheduled	Serv Req	Total	Allotted	Balance	
<input checked="" type="checkbox"/> Inc NS	Trip Quantities      07/01/2012      07/31/2012	0	26	10	36	26	-10	<input type="button" value="Σ"/>