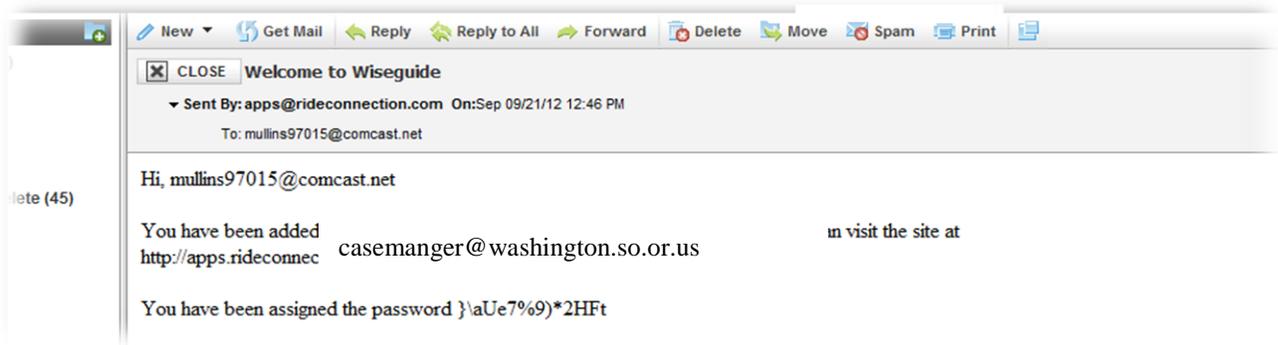




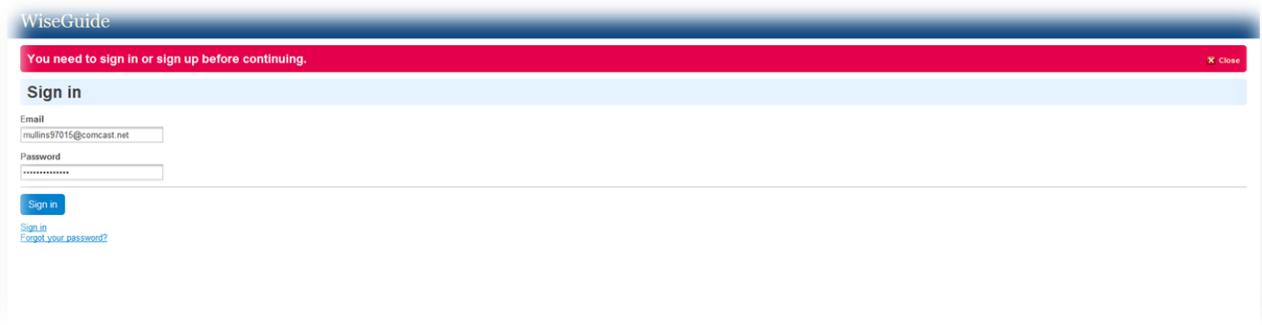
WiseGuide User Information for Case Managers– 6 Easy Steps

Step 1: To become a new user of the WiseGuide data management system, send an email to Mike Mullins at mmullins@rideconnection.org with your full name, telephone number, and the email address you intend to use to communicate with the system. The WiseGuide system will use that information to create your account.

The system emails a link to <http://apps.rideconnection.org/wiseguide/> with an automatically generated password with letters and special characters.



Step 2: Click on the link or copy and paste it into your web browser. Your first password is intentionally complicated. You may want to copy that initial password and paste it into the appropriate field. You can change your password to something more memorable later.



Step 3: Upon successful login, you will be taken the WiseGuide “Dashboard” where you will see recent cases. From this page, you can also search cases based on the customer’s name or a specific date range. The page allows you to view assessment information from you and your specific district center.

From this page, you can also change your password. Password must be 8 characters in length with at least one number and one special character. To change your password, click on your email address in the top right corner of the page.

This page also serves as a portal for new assessment requests. To submit a new assessment request, click on the “Submit Request” tab to the right of the “Dashboard” tab.



New Assessment Request

Customer first name

Customer middle initial

Customer last name

Customer identifier

Customer phone

Customer birth date
2018 February 23

Assigned to
<Select Assigned to>

Reason not completed
▼

Notes

Attachment
Choose File No file chosen

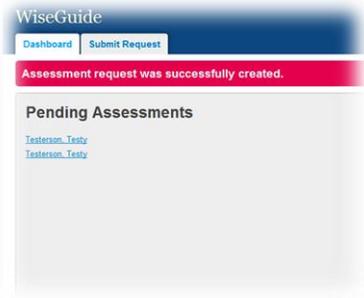
Save

[Back](#)

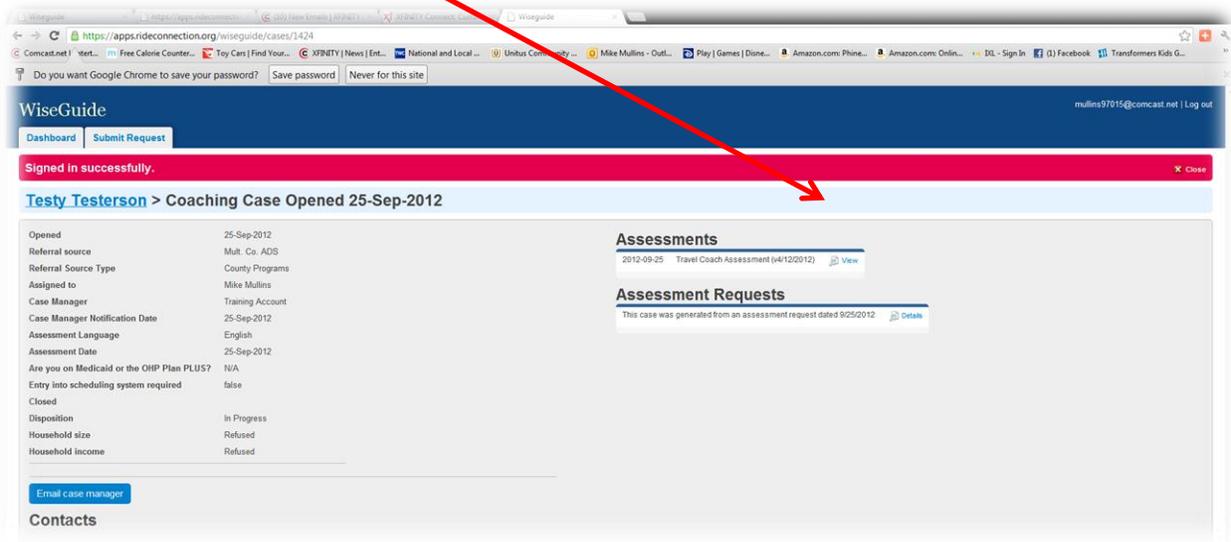
NOTE: Be sure to record your customer’s **Prime** number in the “Customer Identifier” field

Step 4: After clicking the “Submit Request” tab, you will be taken to a new page where you will be asked to provide information about customer. Once you have completed this step, click “Save” in lower left corner. You will be brought back to the “Dashboard” where you will see that you successfully created a new assessment request.

(Clicking “Save” more than one time will result in multiple requests)



Step 5: Wait. A Ride Connection Travel Options Counselor will contact and assess the travel needs and ability level of your customer. Once the assessment is complete, you will receive an email notification with “Customer Assessment Notification” in the subject line. The email will have a link back to WiseGuide and the specific case in question. Click on “view” to see the results of the assessment you requested.

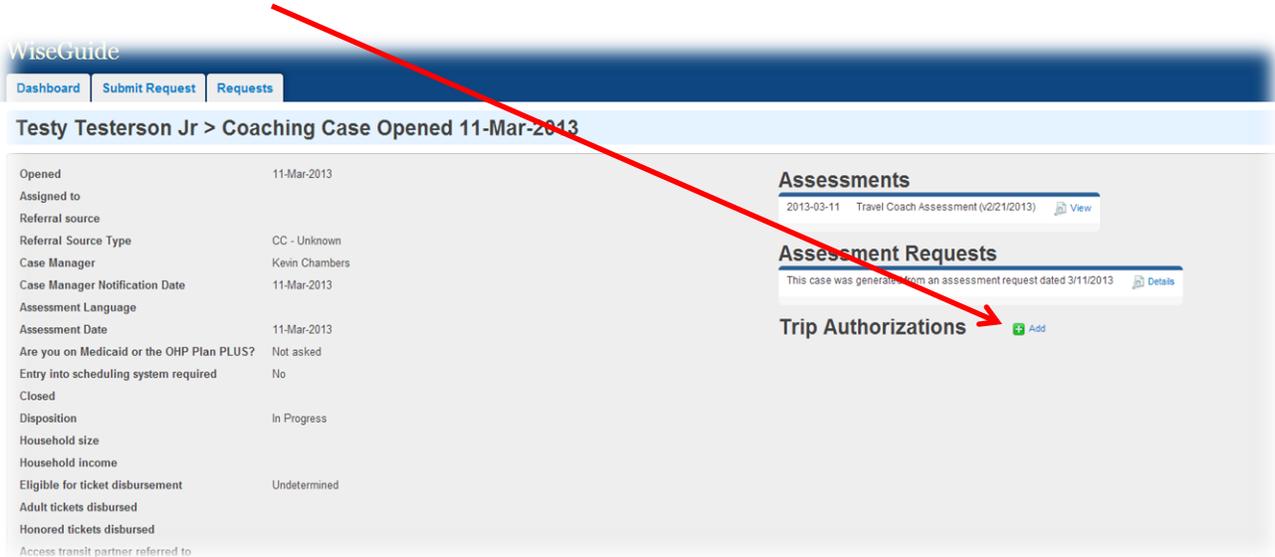


The process is nearly finished! The travel options Counselor, as the last part of the assessment, will provide a clear narrative illustrating your customer’s transportation picture.

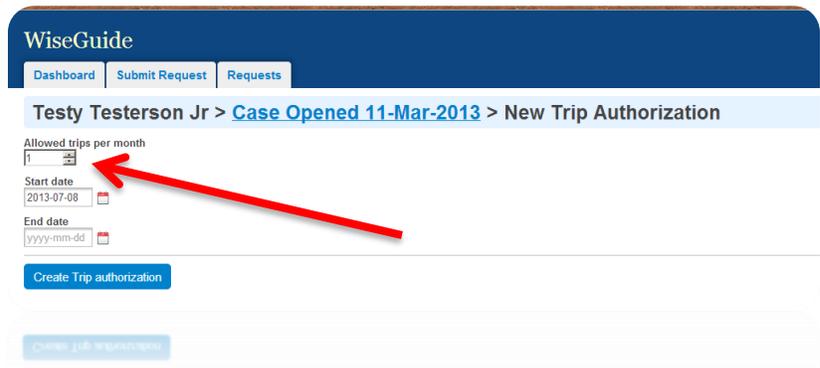
Step 6: If you determine that a “Premium” level of service is warranted, use the online authorization feature to let us know how many rides you are authorizing each month. **Please include an expiration date in your online ride authorization.** Our travel options counselors will send your customer a welcome letter indicating the number of “Premium” authorized along with the expiration date.

Note: Please remind your customers that it is their responsibility to notify Ride Connection whether or not the requested ride is “Premium.”

Click “Add” to create a new online authorization for your customer.



Add the number of allowed trips (Remember: trips are one-way rides, a round trip equals 2 one-way trips) to the appropriate field. Adjust the start and end dates to suit your customer’s needs. If you enter the value incorrectly, simply add a new authorization with correct number of rides and/or the correct start and end dates.



Creating a new authorization does two things.

1. A new authorization invalidates any previous authorizations
2. A new authorization alerts the travel options Counselor to the change so they’re able to make certain that Ride Connection’s scheduling software is up-to-date with any new Premium Level ride information.
3. **To end an existing authorization**, simply create a new authorization using “0” along with your desired expiration date. This ends the authorization as of the date you enter.