



## VOLUNTEER DRIVER MILEAGE REIMBURSEMENT SERVICE BUSINESS CONSIDERATIONS

### Volunteer Driver Mileage Reimbursement WORKFLOW and ACTIONS

#### Typical Monthly Workflow

1. OUTREACH
  - a. Public presentations to agencies and organizations
  - b. Distribution of brochures and other marketing materials
  - c. Other advertising methods
2. REFERRALS
  - a. Enter applicant's data in TT software
  - b. Enter any notes from referral source
3. APPLICATIONS
  - a. Call applicant and complete an Eligibility Application over the phone
  - b. Mail application for review and signature
  - c. Follow up monthly if there is no response from applicant
  - d. Enter all communications with applicant in the client's TT Notes section in detail
4. APPLICATION PROCESSING
  - a. Review application when received - Call applicant if there are any further questions
  - b. Process Verification of Health Status for applicants, as required
  - c. Prepare all documents to present at the Eligibility Determination Committee meeting
  - d. Make a recommendation for EDC
  - e. Enter EDC evaluation comments and eligibility determination in applicant's file in the TT Notes section
5. FOLLOW-UP TO EDC DETERMINATION
  - a. If not approved for TRIP service, send letter to applicant
  - b. If approved, mail Welcome Packet to Rider
  - c. Update TT software with the funding source and allowances for the Rider
  - d. Follow up monthly if Rider has not used the program
  - e. Enter detail of all actions and communications in the client's TT Notes Section
6. PROCESSING REQUEST FOR MILEAGE REIMBURSEMENT SHEETS
  - a. Review and date stamp every Request for Mileage Reimbursement when received
  - b. Check for completeness of form (Solve any issues with the forms via phone or mail before processing)
  - c. Enter record of receipt of each form in the client's TT Notes section
  - d. Print a blank Mileage Form for each rider to be mailed out
  - e. Make sure prior financial period for prior month is closed and then open current financial period to enable payment processing
  - f. Enter all trips reported by each client in the Payments section of TT software
  - g. Mark trips paid once processing for the month is complete
  - h. Send out payment packages with client address on blank mileage reimbursement form showing through window of #10 window envelope and check enclosed inside
  - i. Field calls and questions from riders about their checks and make any needed corrections
7. DEACTIVATION OF RIDERS
  - a. Reasons-moved out of county, able to drive, family is available, death
  - b. Deactivate file in TT software and enter detailed Notes in TT.



## **VOLUNTEER DRIVER MILEAGE REIMBURSEMENT SERVICE**

### **BUSINESS CONSIDERATIONS**

#### Additional Monthly Actions Required

1. Follow up with pending applicants
2. Follow up with Approved but not yet Active Riders
3. Prepare invoices and reports for funders/grantors

#### Daily Actions Needed

1. Intake/Referral retrieval
2. Distribution of Intakes/Referrals
3. Enter Intake/Referral in TT
4. Make contact with applicant and complete an Application over the phone
5. Messages left on voicemail should be returned the same day
6. Application Review (as needed)
7. Process Verification of Health Status (as needed)
8. Mail processing
9. On-going customer service calls