



Get to know *Improved Caregiver Management*

What's new?

We're introducing improvements to the Caregiver Management flow in the VOC, designed to make it easier for your staff to create and manage caregiver profiles and their connections to riders.

This update allows your team to easily distinguish between riders and caregivers in all parts of Caregiver management. The highlights:

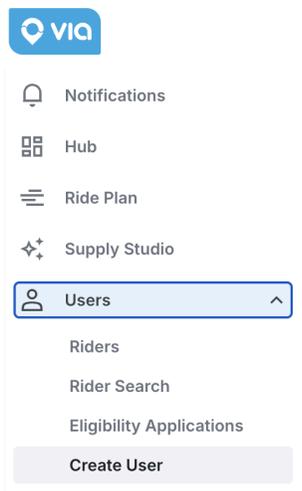
- Clear user creation process
- Easily make connections between caregivers and care recipients
- Accurate and differentiated reporting on Riders and Caregivers

How it works:

This feature introduces a simplified, intuitive process for adding caregivers and managing their connections to other riders.

1. Updated User Creation Flow

- The “Riders” Menu item will be updated to “Users”
- The entry point for creating a new user will be updated from “Create Rider” to “Create User”



- Clicking “Create User” will prompt you to select the type of profile you are adding. Your options will be:
 - Rider
 - Caregiver



- Rider & Caregiver

Create user ×

- Rider**
Riders are eligible to book and take trips on your agency's services.
- Caregiver**
Caregivers can track and manage trips on behalf of a rider.
- Rider & Caregiver**
Riders with dual roles can take trips and manage trips for another rider.

[Next](#)

- Selecting Rider will bring you to your existing Create Rider flow with no changes
- Selecting Caregiver will bring you to a simplified form

Create user ×

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Phone Number *	Email address *
<input type="text" value="+0 000 000 0000"/> <small>Country code and area code are needed</small>	<input type="text"/>
Street Address	City
<input type="text"/>	<input type="text"/>
Postal Code	
<input type="text"/>	

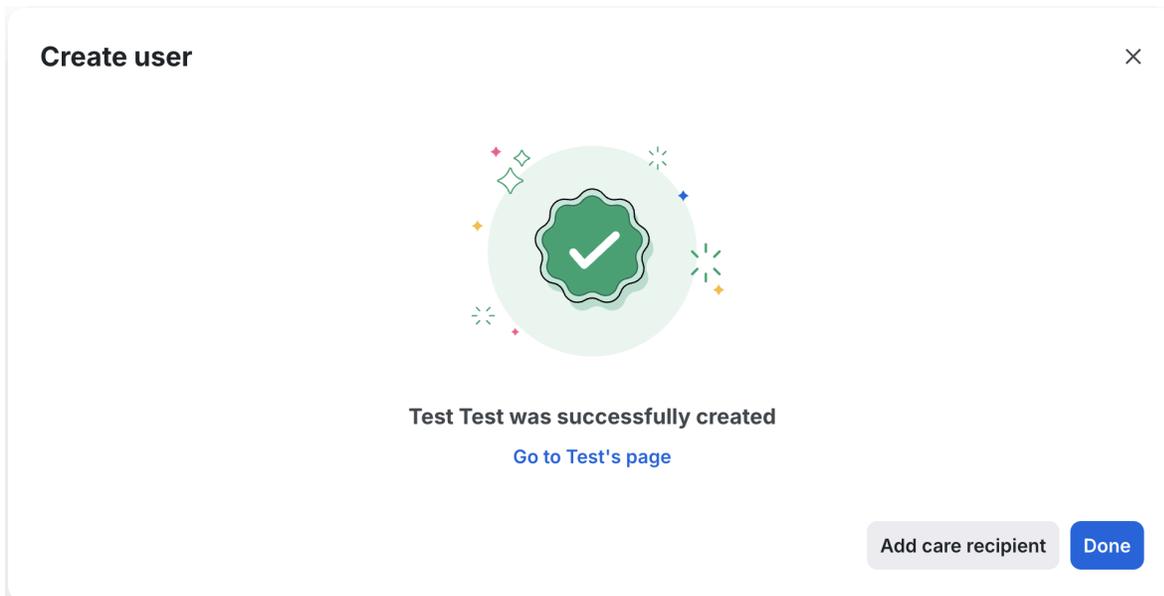
[Back](#) [Save](#)

- Selecting Rider & Caregiver will open the same creation form as Rider
- Once you save the user, you can change their user type if needed by navigating to “Edit Details” in their account tab.
- Important notes:
 - Caregivers are not eligible to ride
 - Users with the dual Rider & Caregiver role are eligible to ride and can also be connected to care recipients to track rides

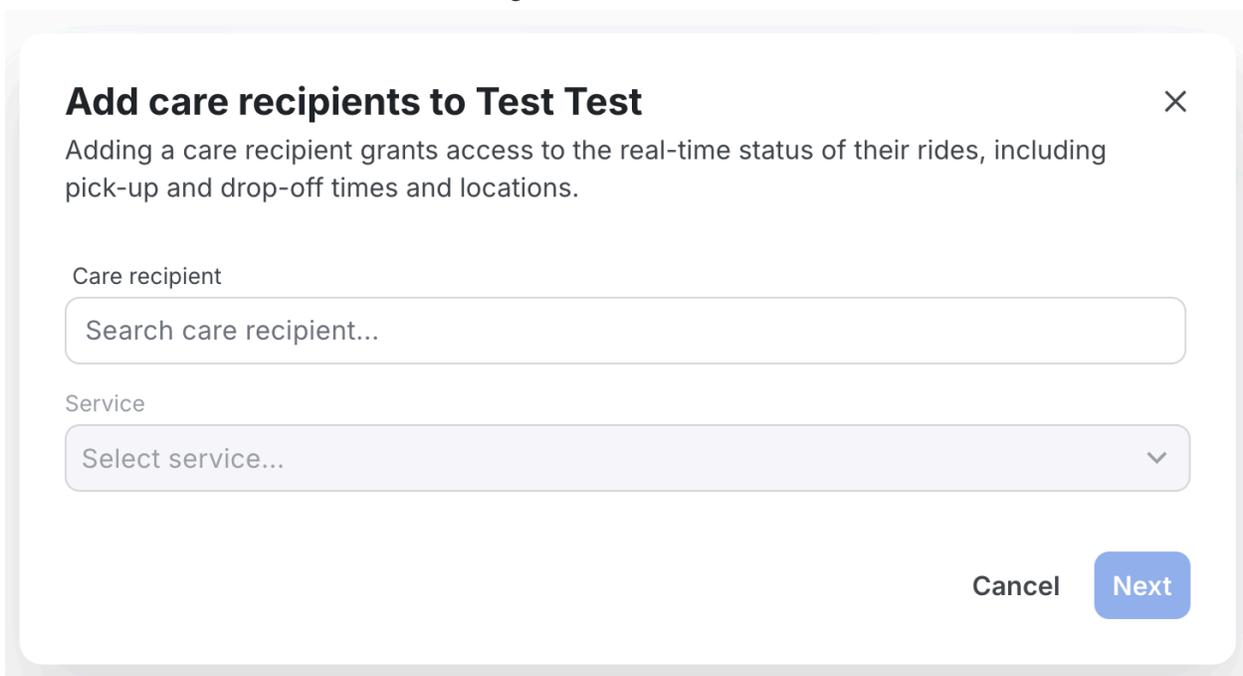


2. Streamlined Care Recipient Connection

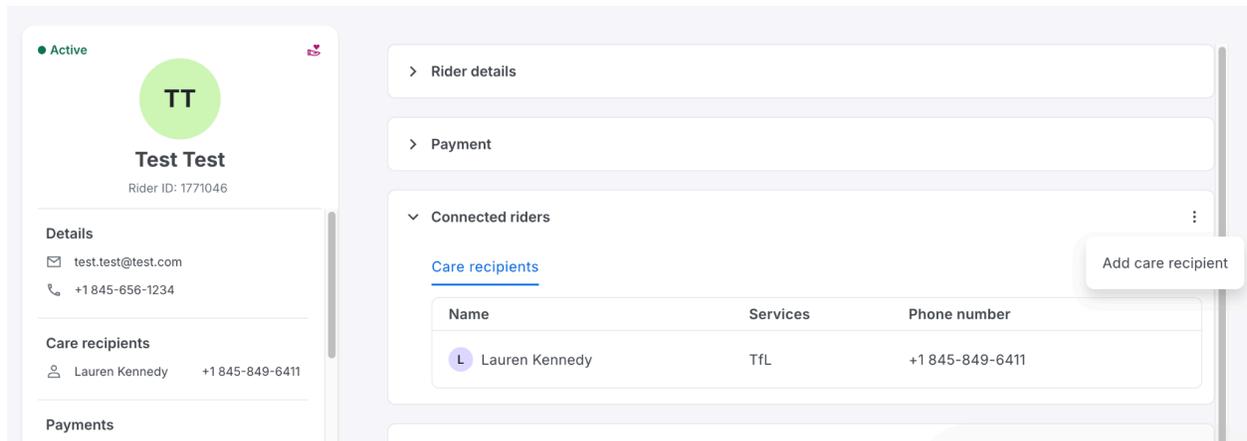
- After successfully creating a Caregiver profile, you will see a success message with the option to "add care recipients".



- Selecting this option directs you to a screen to search for the rider that you want to add as a care recipient. Caregivers will be filtered from the search to ensure that only valid riders are connected to the caregiver.

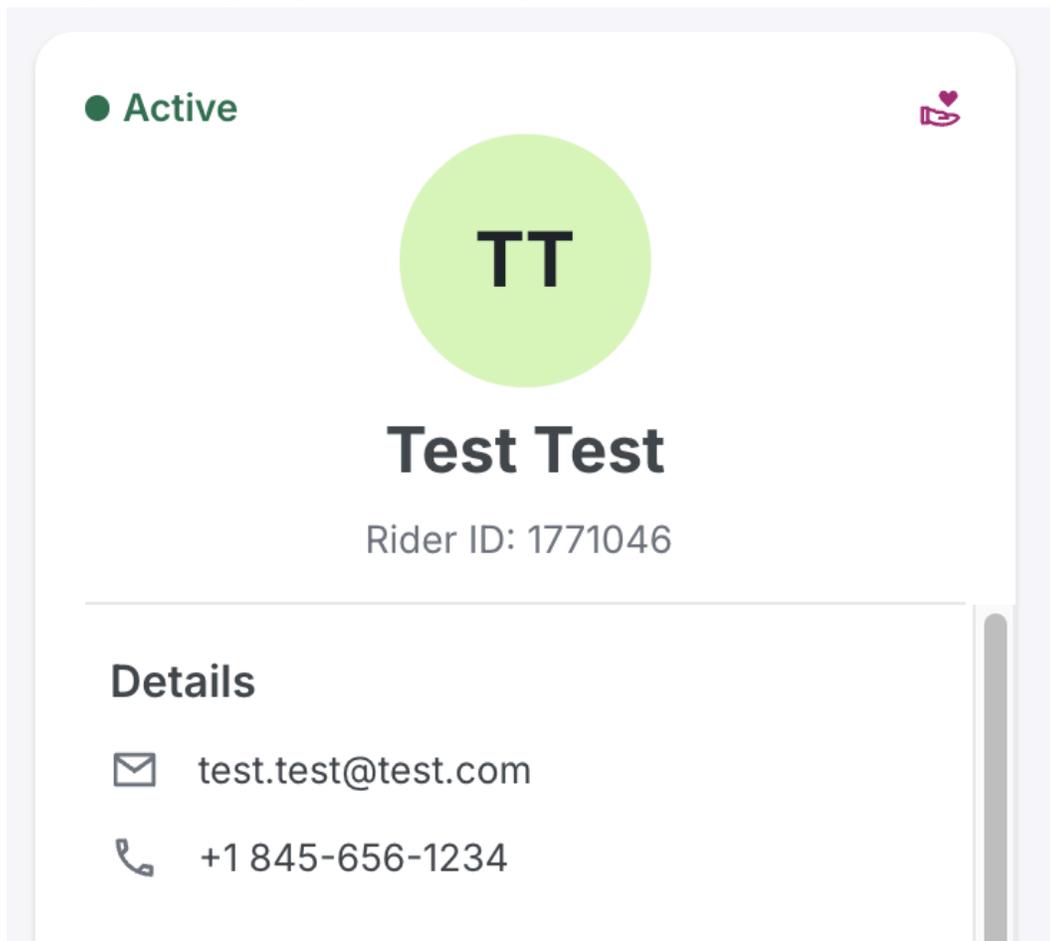


- Once the connection is confirmed, you will see the Care Recipient on the Caregiver's profile page and you can add additional care recipients if needed.

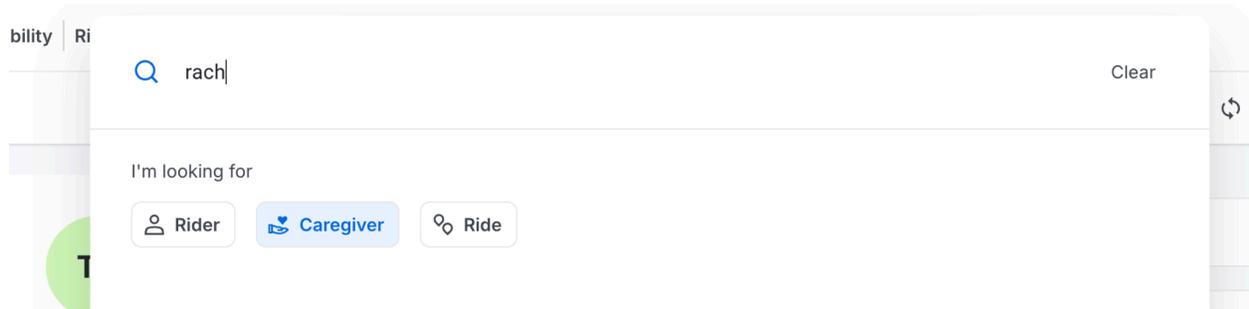


3. Improved Visibility and Search

- A new Caregiver icon was added to the user profile card to help you identify if you are looking at a Caregiver profile or a Rider profile



- You can also search for Caregivers from VOC Global search



4. Updated Reporting

Reporting has been updated to reflect the new Caregiver user type.

- A new Data Generator report, "Caregiver Account," will be available. Use this report to pull information about all Caregivers, including profile details and connected riders.
- In existing Rider reports, Caregivers will be filtered out to maintain accurate service metrics. Updated reports:
 - Rider Growth
 - Rider Account
 - Rider Activities
 - Rider Service Insights

Keep in mind:

- You will only see these changes if you have the Caregiver App enabled. Want to bring it to your service? Please reach out to your Partner Success Manager
- This update does not change anything about the Caregiver Web App or the Rider App—only the caregiver management experience in the VOC

Next Steps

Our goal is to build software that meets your needs, so please share your feedback on this feature as you begin to use it. We'd love to hear your thoughts!