Get to know *Renewals in the Eligibility Portal*

What's new?

We're introducing new features to streamline the Eligibility renewal process and provide better visibility into rider eligibility history. The highlights:

- **Identify Riders with Expiring Eligibility and Generate Renewal Notices:** Search for riders with eligibility expiring soon, and then generate and send renewal notification letters using customizable templates - all without leaving the portal.

- **Support for Multiple Eligibility Date Ranges:** Riders can now have multiple sets of eligibility dates (past, current, and upcoming), which allows for a seamless transition between an active and renewal eligibility period.

- **Enhanced Visibility into Eligibility History**: You can now see a rider's current, past, and upcoming eligibility dates in the Rider Management page, as well as contextual information about their active eligibility when processing a renewal application in the Eligibility Portal.

- **Renewal Application Tagging and Filtering:** Applications for riders that meet specific criteria (outlined in the next section) will be marked with a renewal tag automatically, allowing you to easily filter your application queue for renewal applications.

How it works:

With this update, you can easily process renewal applications. Here's how it works.

1. Identifying Riders with Expiring Eligibility

- Navigate to the **"Approved"** applications queue
- Use the **Eligibility End Date** filter to see all Riders with eligibility expiring within a specific time range. When applied, the list sorts by the soonest expiration date.
    - **Expiration Flags:** Each record features a color-coded flag indicating how soon eligibility will expire:
        - **Red:** Expiring in less than 30 days (or expired within the past 30 days).
        - **Yellow:** Expiring in 30–90 days.
        - *Note: Hover over the flag to see the exact eligibility end date.*
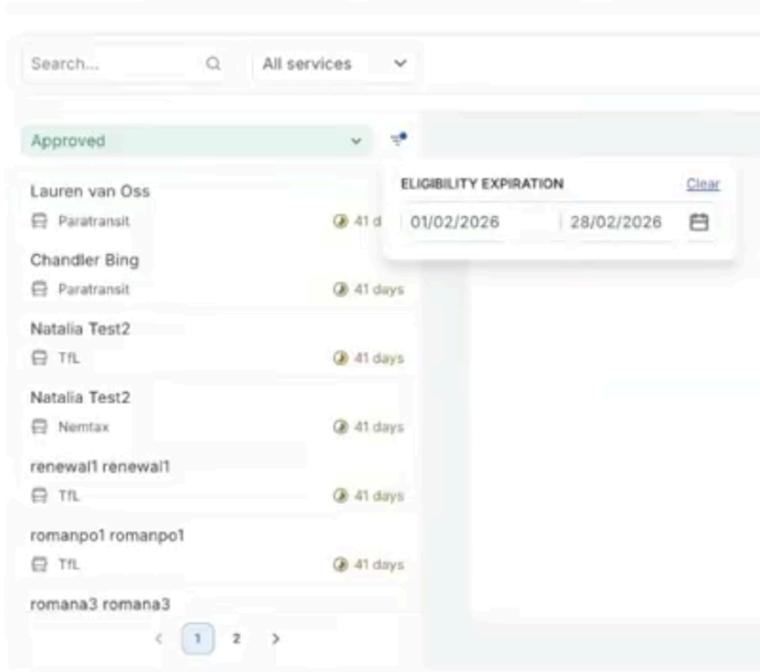
- Review the rider's application record to decide whether or not you need to send a renewal notice to the rider. We added the following tags to help you understand if the rider is active:
  - **Last Ride** - indicates whether the rider has taken a ride on the service in the last 6 months or not.
  - **Suspended** - this tag will display if the rider is suspended, either temporarily or permanently

![Via logo]
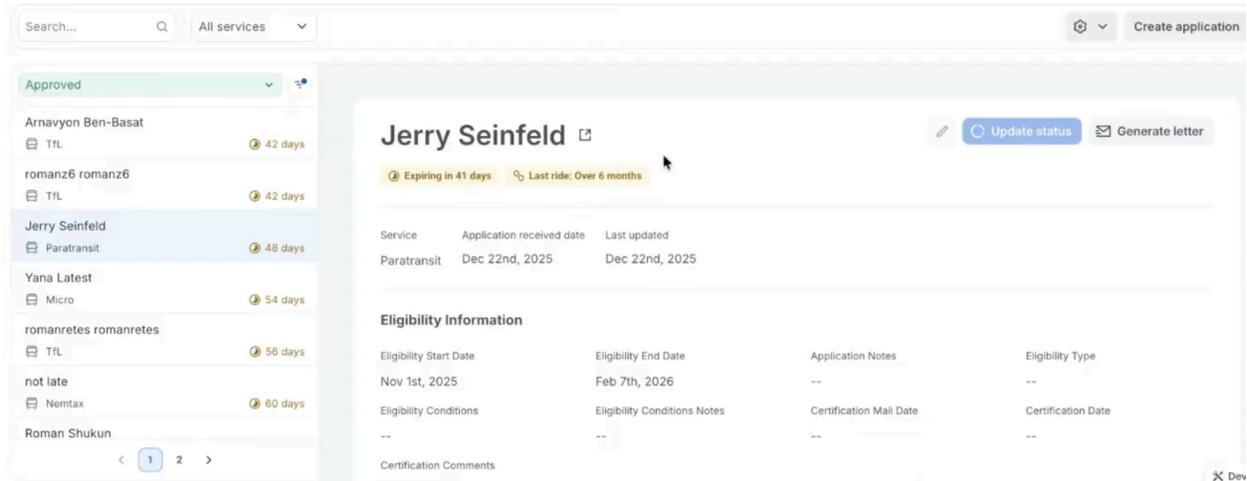
2. Generating Renewal Letters

To help you notify riders that they need to re-apply, we have added a dedicated "Renewal" letter template.

- **Create a Renewal Letter Template:** Go to Eligibility settings > Manage Letter Templates and create a new Letter Template with the "Renewal" type selected
- **Generate a renewal notice for a rider:**
    - Use the eligibility end date filter to find a rider who needs to renew.
    - Select "Generate Letter" on their application record
   - Select the Renewal Letter Template you'd like to use and click "generate"
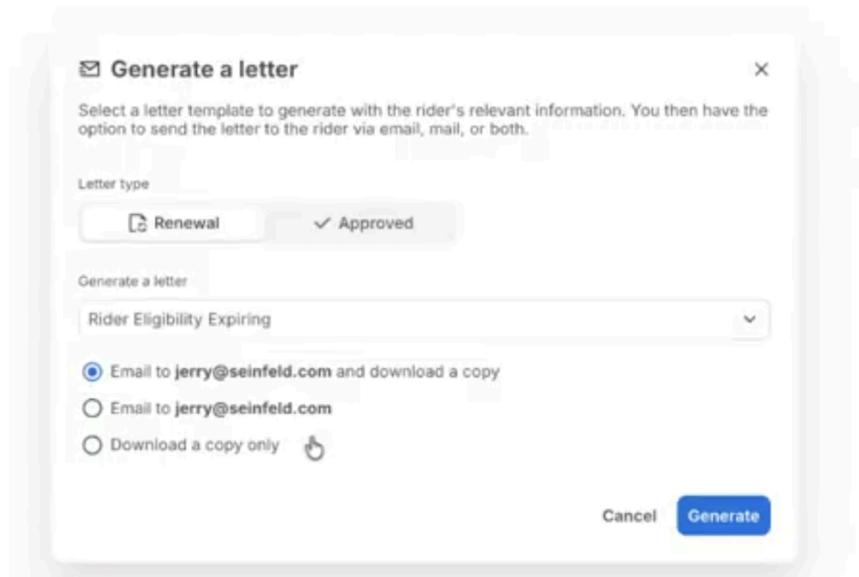
- **Letter History:** Once generated, the letter is saved in the rider's letter history.
- **Rider Notification:** If sent via email, riders will be able to log in to your web app to download a copy of the letter.
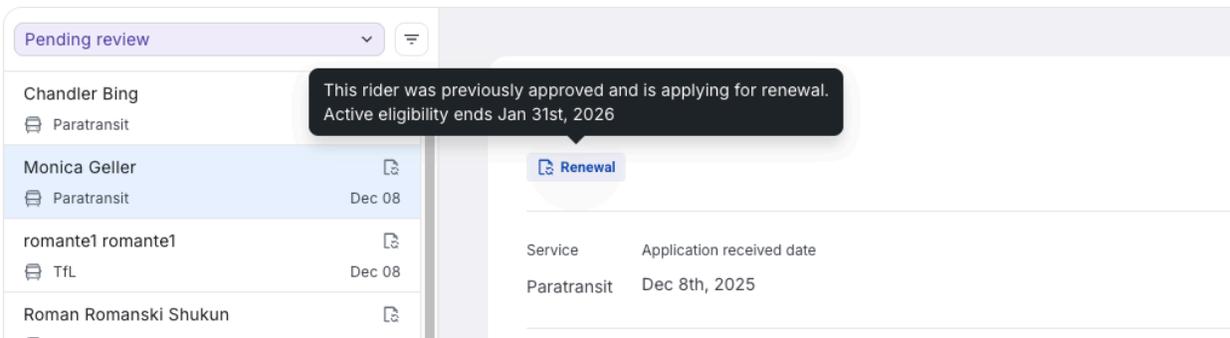
3. Creating a renewal application

- When you receive a renewal application from a rider, create a new application in the Eligibility Portal as you normally would - either by manually entering the application details, or by using the AI assisted scanning tool.
    - Click "New Application"
    - Select your creation method (manual or scan)
    - Enter and review rider's details
    - Save the application
- *New!* If the application meets the following criteria it will be automatically tagged as a renewal application.
    - The rider existed in the system before the application was created.

○ The application is for the same service the rider was previously eligible for.
○ The rider has a current eligibility period (end date in the future) OR an expired eligibility period at any time in the past.
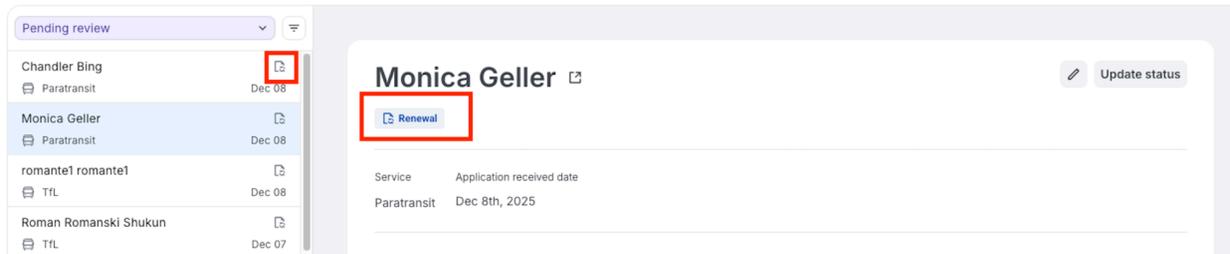
● Hovering over the Renewal tag will give you more information about the Rider's existing eligibility

4. Filter to all Renewal Applications
● Use the 'Application Type' filter to view all renewal applications in a specific status

5. Enter the Rider's new Eligibility Dates in their renewal application
- When you're ready to document the rider's new Eligibility Dates, there are two ways you can add them to the application record
    - 1) If you're not approving the application yet, but want to document the new dates you can:
        - Click "edit application"
        - Navigate to the "Eligibility Information" section of the form
        - Enter the Eligibility Dates and click "submit"
        - *New!* You will see a banner above the Eligibility Start and End Date fields that tells you the rider's current and upcoming eligibility periods so that you can ensure alignment with the new dates

Via

Update application - Eligibility information ✕

Rider has an active eligibility period: December 06, 2025 - December 28, 2025

Eligibility Start Date

dd/mm/yyyy 📅

Eligibility End Date

dd/mm/yyyy 📅

Application Notes

0/1000

Application Received Date

04/12/2025 📅

Eligibility Type

⌄

Eligibility Conditions

⌄

Eligibility Conditions Notes

0/1000

Certification Mail Date

dd/mm/yyyy 📅

Certification Date

dd/mm/yyyy 📅

Certification Comments

0/1000

← Back   Cancel   **Submit**

- 2) If you are ready to approve the rider's application, you can skip the step above and go directly to "Update Status" and enter the Eligibility Dates there:
    - Click "Update Status"
    - Select "Approve"
    - Enter Eligibility Dates and Save
    - ***New!*** You will see a banner above the Eligibility Start and End Date fields that tells you the rider's current and upcoming eligibility periods so that you can ensure alignment with the new dates

Update status   ✕

✓ **Approved**
Applicant is eligible. Confirm eligibility information and send approval notice.

📝 Add note (internal only)

Enter notes (optional)

0/1000

> Rider has an active eligibility period: December 06, 2025 - December 28, 2025

Eligibility Start Date
dd/mm/yyyy 🗓

Eligibility End Date
dd/mm/yyyy 🗓

Application Notes

0/1000

Eligibility Type
⌄

Eligibility Conditions
⌄

Eligibility Conditions Notes

Cancel   **Approve**

6) View the Rider's complete eligibility history in Rider Management
   ● Once the Rider is approved, navigate to their Rider Profile to view their eligibility history under Account > Eligibility

Keep in mind:

- **Expanded Visibility into all Eligible Riders:** Your list of approved applications now includes **all riders eligible for service**, including those who do not have an application processed through the portal. This ensures that your team will be able to identify all riders who require a renewal application, even if you just started using the Eligibility Portal and your riders were added through the "Create Rider" flow in Rider Management.
  - **No Application" Indicators:** Riders without an application on file are marked with a **special icon** and a **"No Application on File"** tag in the preview section. These records will display Rider Information (including "Last Ride") but will show no files or submission dates.
- To ensure accuracy, the portal handles specific data changes made after an application is approved:
  - **Data Updates:** If eligibility dates or conditions are updated in Rider Management after approval, the portal will display the **most recent data**.
  - **Deleted Eligibility:** If eligibility is deleted after approval, the system will show an empty eligibility section.
  - **Suspensions:** If a rider is currently suspended, a flag will appear on the record.
  - **Deleted Riders:** If a rider is deleted after approval, the record remains visible in the Approved queue with an indication of the deletion.
- **Riders can have only one Active and one Upcoming Eligibility Period per service:** Riders can have an unlimited number of past eligibility periods, but can only have a single Active and a single Upcoming eligibility period in each service.
- **Eligibility Dates cannot overlap:** If you try to enter an eligibility period that overlaps with a rider's existing eligibility period you will not be able to save it until you adjust the start and / or end date of the new date range.

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!