



# Get to know *Rider Assessments in the Eligibility Portal*

## What's new?

We are introducing new features to help you manage the Paratransit Eligibility Assessment process directly within the Eligibility Portal. Previously, tracking the applications that need in-person assessments required external spreadsheets and manual workflows. These updates streamline the lifecycle of an application and enable your team to use the Eligibility Portal as your single source of truth for application information. The highlights:

- **New "Assessment Required" Status:** You can now move applications into a dedicated assessment state to track riders who need an in-person evaluation.
- **Send Assessment Letters:** Generate and send assessment notification letters to riders using customizable templates directly from the portal.
- **Assessment Data Tracking:** Record key details such as appointment dates, times, and assessment notes, and upload completed assessment forms to the rider's record.
- **Enhanced Filtering for Scheduling:** Use new filters and tags to distinguish between riders who have an appointment scheduled and those who still need one.

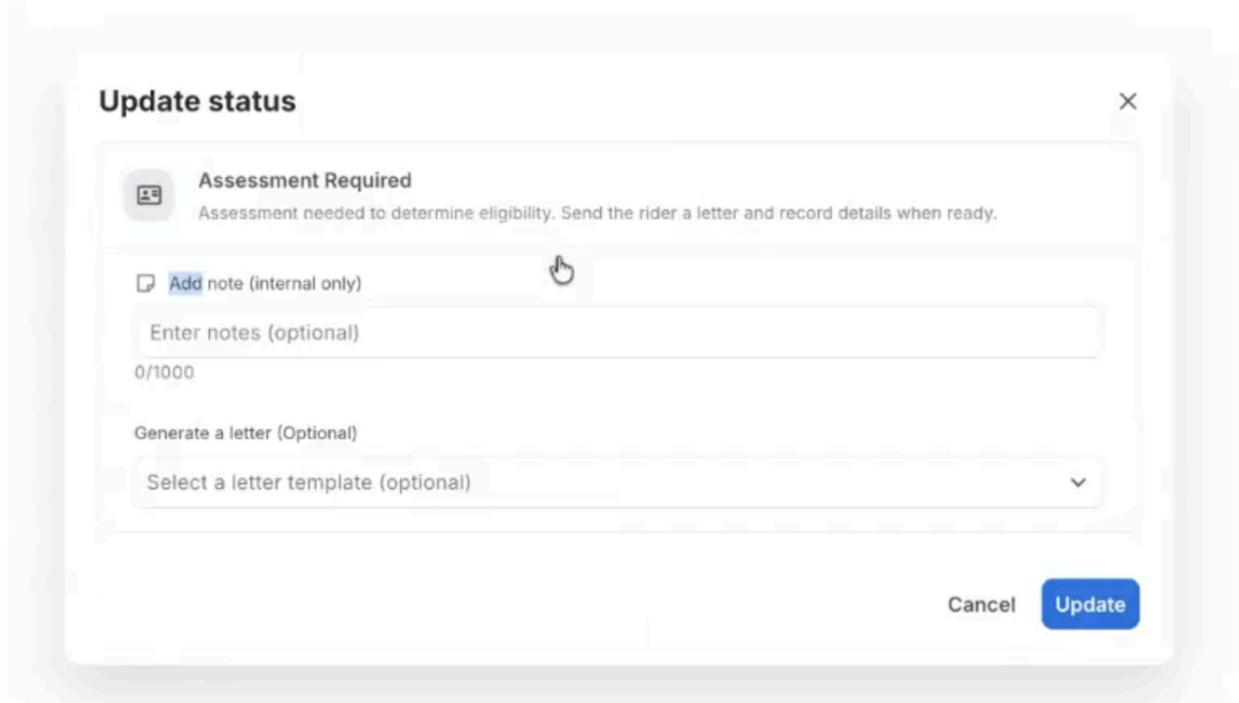
## How it works:

With this update, you can track rider assessments without leaving the VOC. Here is the workflow:

### 1. Marking an application for assessment

When reviewing an application in **Pending Review** or **Missing Information**, you can now move it to the assessment phase.

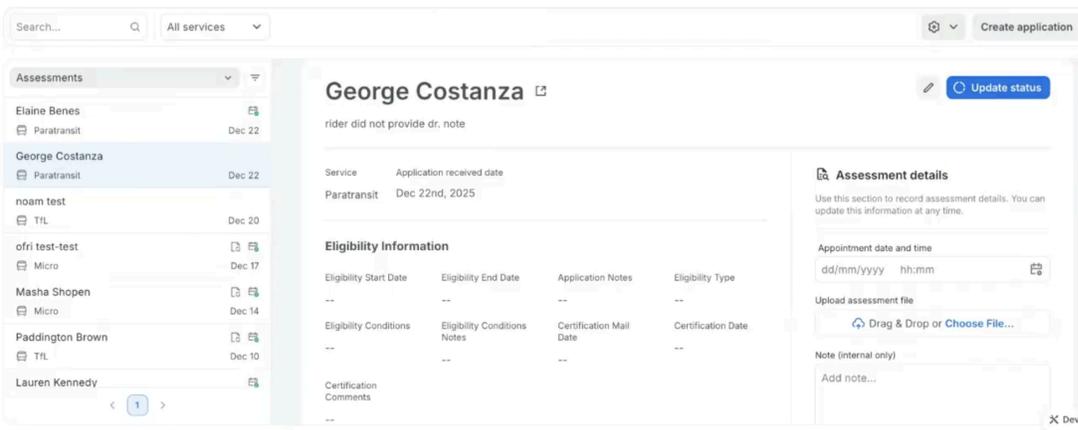
- Click **Update Status**.
- Select **Assessment Required**.
- You will have the option to **generate an assessment letter** immediately using your pre-defined templates to notify the rider about next steps.



## 2. Recording assessment details

Once an application is in the "Assessment Required" status, a new **Assessment Details** section becomes visible on the application record.

- **Document Appointments:** Enter the **Appointment Date and Time**.
- **Automatic Tagging:** Once a date is entered, the application is automatically marked with an **Appointment Scheduled** tag.
- **Upload Results:** Use the drag-and-drop tool to upload the final assessment form and add internal **Assessment Notes** (up to 1,000 characters).

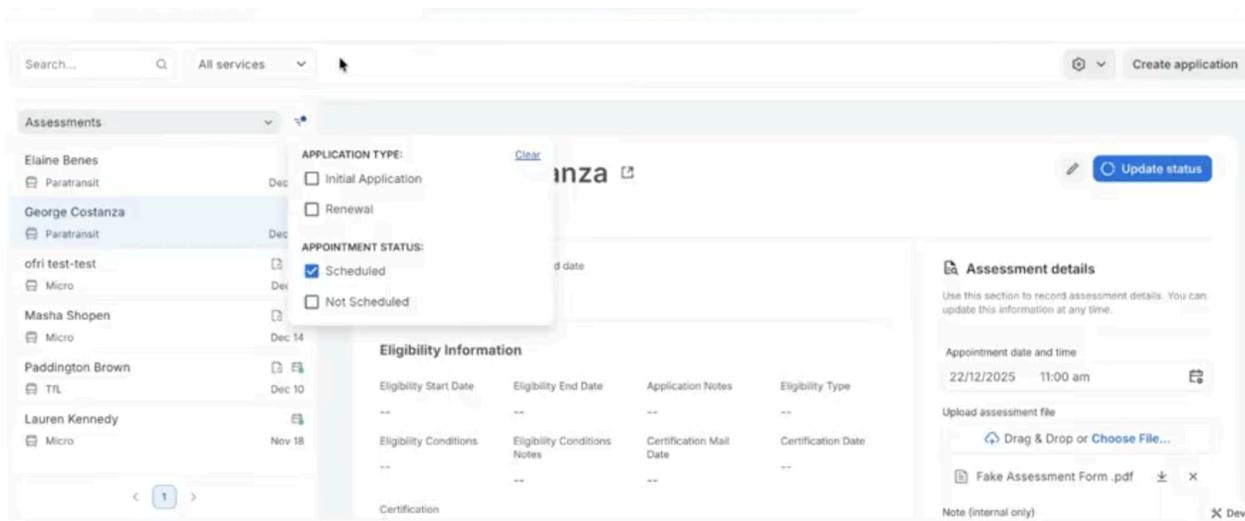




### 3. Filtering your assessment queue

Manage your workload by filtering the application list to see exactly where riders stand in the assessment process.

- Use the **Application Status** filter to view all riders in **Assessment Required**.
- Use the **Assessment Scheduled** filter to toggle between:
  - **Assessment Scheduled:** Riders with a confirmed date/time.
  - **Pending Assessment Schedule:** Riders who still need an appointment set.



### 4. Moving to a final decision

After the assessment is complete and data is recorded, you can move the application toward a final result.

- From the assessment status, you can move the application back to **Pending Review** or **Missing Information** if more internal work is needed.
- If the assessment provides enough information, use the **Approve** or **Deny** buttons to finalize the eligibility decision.



## Keep in mind:

- **Optional Status:** Use the Assessment Required status if assessments are part of your eligibility process, but know that this is optional and you can decide not to use this status if it doesn't match your team's review process.
- **Editable State:** Assessment fields (like appointment date and notes) are only editable while the application is in the Assessment Required status. Once the status changes, these fields become read-only for record-keeping.

## 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!