Get to know Via's Eligibility Manager

What’s new?

Accept and review applications for any service that requires eligibility criteria, all in one place. With options for a digital rider portal, built-in tools for reviewing applications, and smart rules for things like conditional eligibility, managing eligibility is simpler than ever.

Via’s Eligibility Manager helps your team digitize and streamline the certification process—so riders get the services they need, your team saves time, and your budget goes further.

Here’s what you can do with Via’s Eligibility Manager:

- **Offer a rider application portal**
    - Enable riders to apply for private services online
- **Manage your eligibility application workflow in the VOC**
    - Create a new application
    - Define a rider’s eligibility
    - Update application status
- **Automatically generate letters for application updates**
    - Create letter templates for each application status
    - Dynamically populate letters with rider information when updating application status
    - Print letters ready to send to riders
- **Report on impact**
    - Use Via’s Service KPI Dashboards and Data Generator to pull reports on application response velocity, volume of applications processed, upcoming rider eligibility renewals, and more
- **Manage complex or multi-service eligibility scenarios**

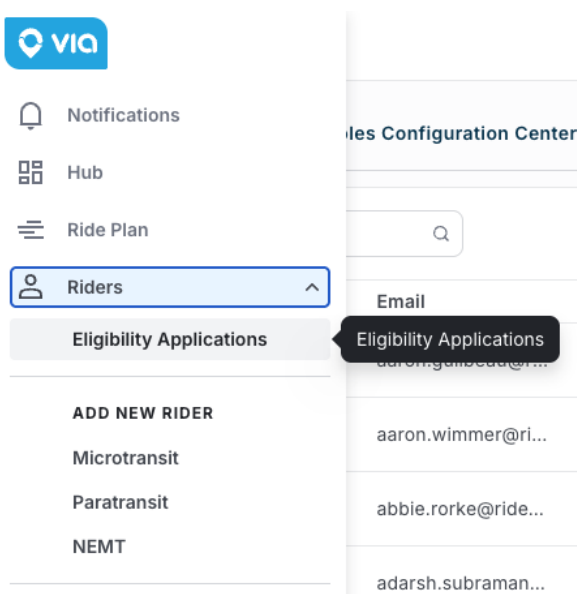
- ○ Managing ADA service, veteran rides, and a senior shuttle? Via's Eligibility Manager maintains distinct eligibility criteria for multiple services.

How it works:

Make sure your team has access

To access the Eligibility Manager, grant at least one user at your organization the role **"EligibilityManager"** by following the steps below:

- Navigate to **Configurations > User Management**
- **Search for the user** that you want to grant "EligibilityManager" access to
- Click **"Edit User"**
- Search for **"EligibilityManager"** in the **"Roles"** field and select the check box
- **Save**
- The next time the user logs in they will be able to access the Eligibility Portal from the VOC menu **(Riders > Eligibility Applications**)



If you have trouble updating access for your team, please submit a support ticket.

Start processing applications

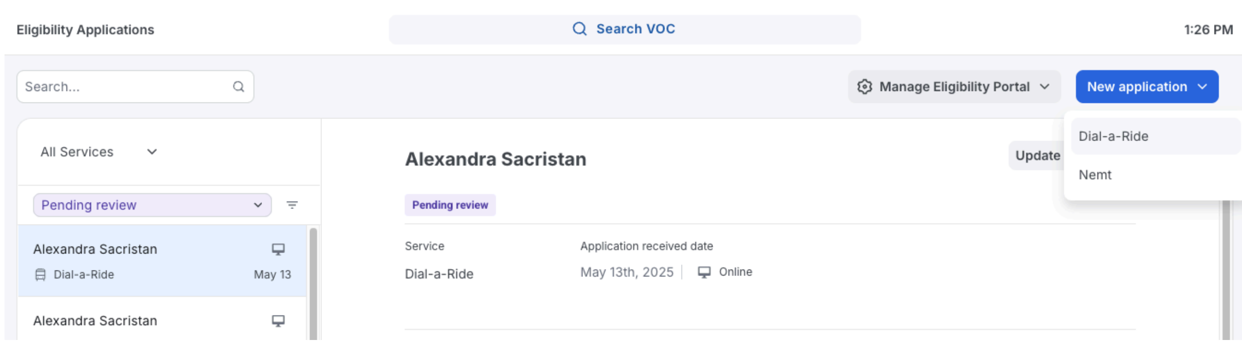
Once you have access, you can start processing applications right away. There are two ways to process applications: manual entry of paper applications and automatic entry of digital applications through the rider application portal (if enabled). Explore each below.

Entering paper applications manually:

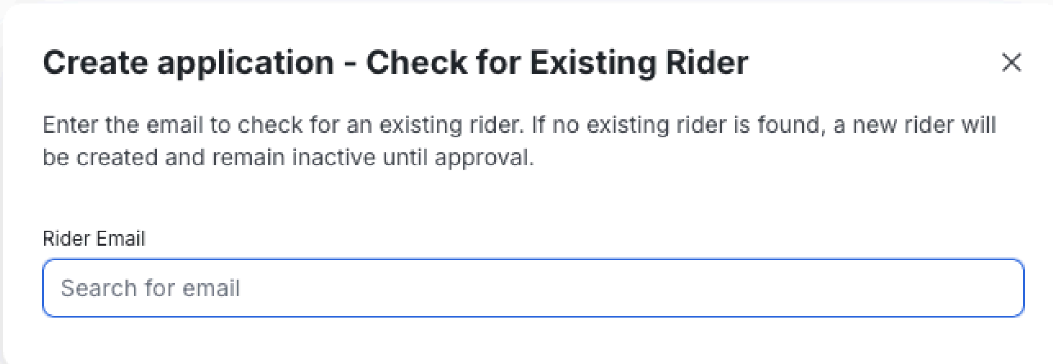
If a rider submits their application via email, mail, or fax you can manually enter their application in the VOC.

How it works:

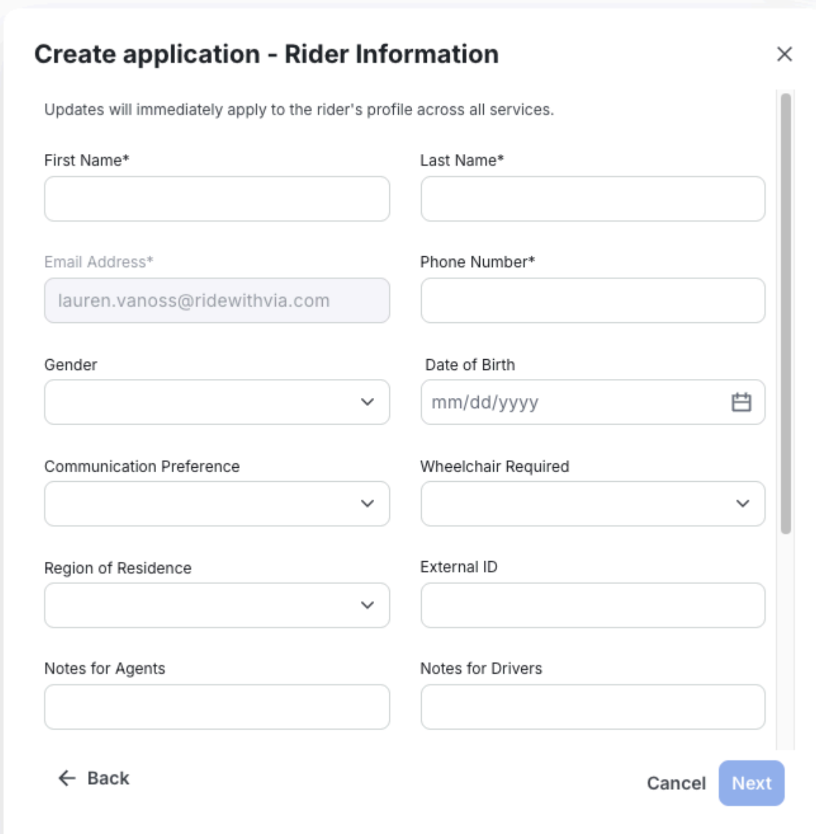
1. Select "**New Application**" on the top right of the Eligibility Application Portal to create a new application. If you run multiple services, you will be prompted to select which service the application applies to.



2. The system will prompt you to **search for an existing rider** by email or phone number on the application (depending on the unique identifier configured during implementation).
    a. If an existing rider is found you will be able to link the new application to the existing rider.
    b. If no existing rider is found, you will be able to create a new rider.
        - **Note**: new riders will be *created* at the same time as the application is created, but will not be *eligible* for the service until their application is approved.



3. Next, **enter rider information for the application**.

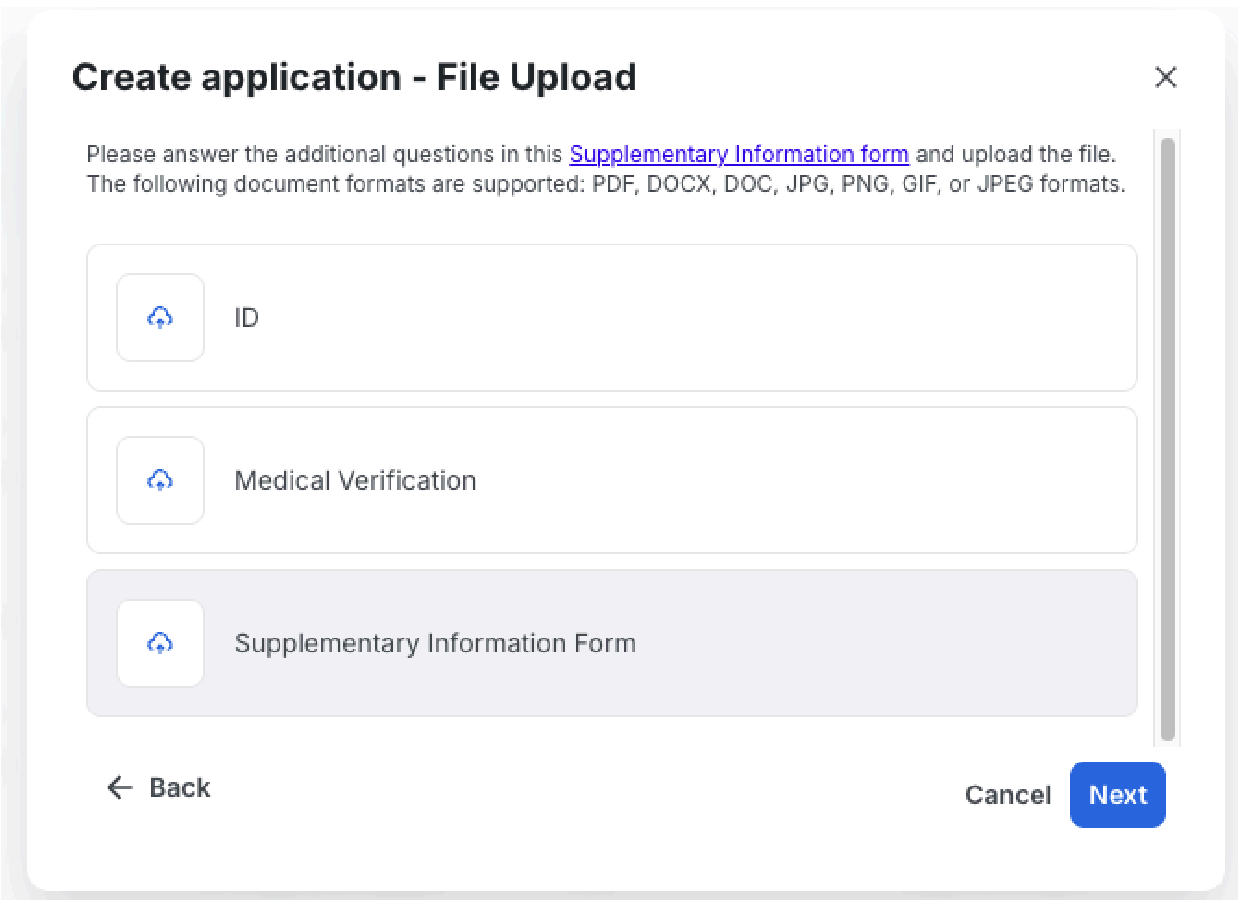


Note: The fields that display in the "Create Application" screen are the same as the fields that are configured in your "Create Rider" flow for consistency. Once you click "next" changes will automatically update to the rider's profile across ALL services.

- ***For existing riders*** - Information will update a rider's profile. For example, if the application has a new address, it will update the rider's address immediately in the rider profile.

- ***For new riders*** - When you click "next", the new rider is automatically created in Rider Management and will be searchable in global search. They will not be active on the service or able to book rides until their application is approved.

4. **Upload relevant files** in the application.



   a. Upload any supporting documentation the rider provided. Examples:

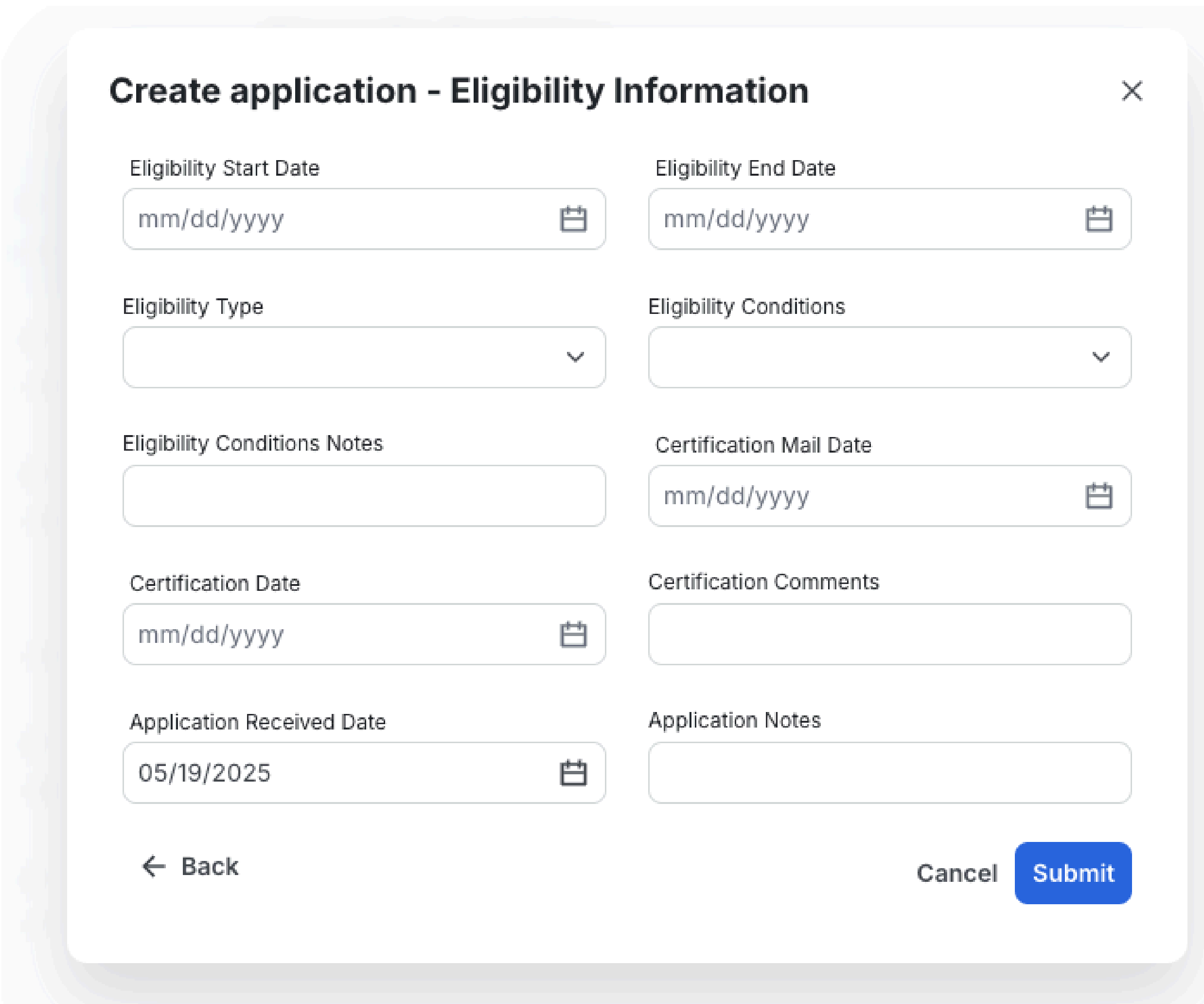
      - Copy of application

- Medical / professional verification
- Doctor’s note
- Copy of ID

b. File support details:

- File types: PDF, docx, doc, jpg, png, gif, jpeg
- File size cap: 20 megabytes per file
- Number of files: 10 max

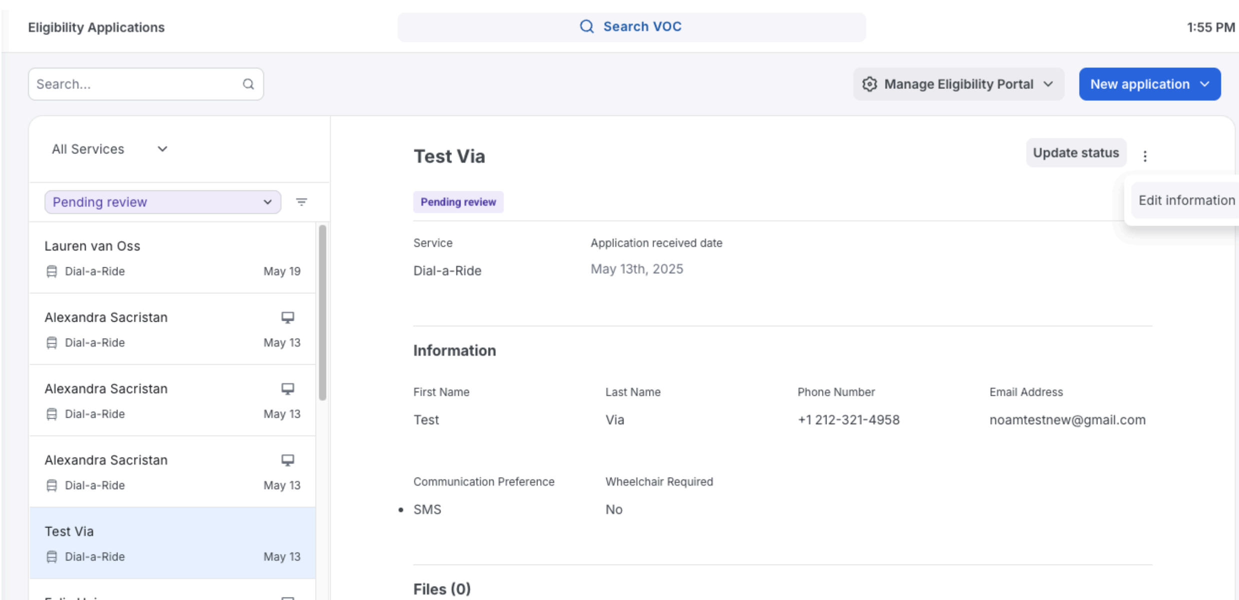
5. Enter the rider’s **eligibility information.**



Note: Eligibility information fields will mirror the eligibility information that you collect during the create / edit a rider flow. The following fields always display:

- Application notes
- Application received date

6. **View application** and update status or edit Information.
    a. Once the application is saved, you will see it in a preview.
    b. Once an application is created, you can:
        i. Edit Information
        ii. Update the status and add a note
        iii. Download any files that have been uploaded



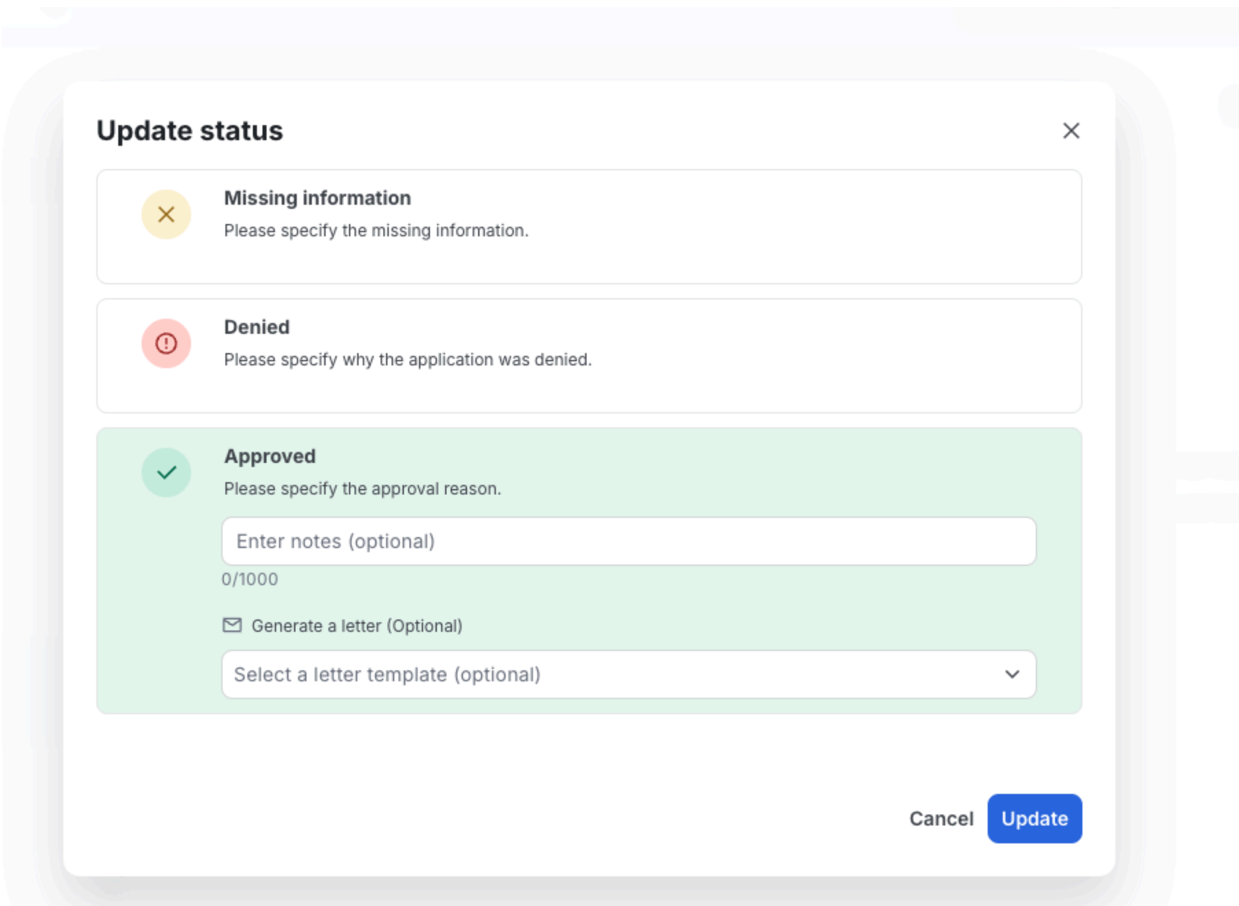
7. **Update application status**.
    a. When an application is created it will be moved to "Pending review" status.
    b. When you are ready to review, update the application status to any of the following:
        - Missing information

- Denied
- Approved

c. Add a note or reason for the status change (optional).

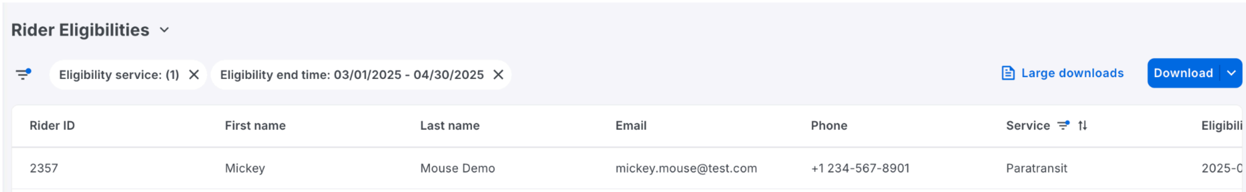
d. When you update the application status, you have the option to automatically generate a status update letter to send to the rider (by mail or email). To learn how to set up Letter Generation, go here.

e. Once a rider is approved, they will automatically become active on the service they applied for. If eligibility criteria was entered, it will automatically be enforced.



8. **Manage renewals**.

- Navigate to VOC Data Generator (**Analytics > Data Generator > Rider Eligibilities**) to pull reports that identify riders whose eligibility is expiring soon.
- Filter to the **Eligibility Service** you want to view (i.e. Paratransit).
- Filter to the **Eligibility End Date Range** (i.e. Eligibility expires between May 1 and May 31st).



- Remind riders to renew their eligibility if applicable.
- When a renewal application is received, follow the same processes outlined above to update their application. The application can be associated with the already existing rider.
    - **Note***:* when adding the rider's new renewal dates, ensure they align with the current eligibility period so that the rider does not lose access to the service for any period of time.

Accepting rider applications online:

You can also accept applications online. An online rider application portal means no more scanning, manual data entry, or physical file storage.

Applications automatically flow through to your Eligibility Manager ready to review, with built-in checks to help avoid duplicates and missing info. You can always continue to offer riders the option to submit applications via email, mail, and fax in addition to offering online submission.

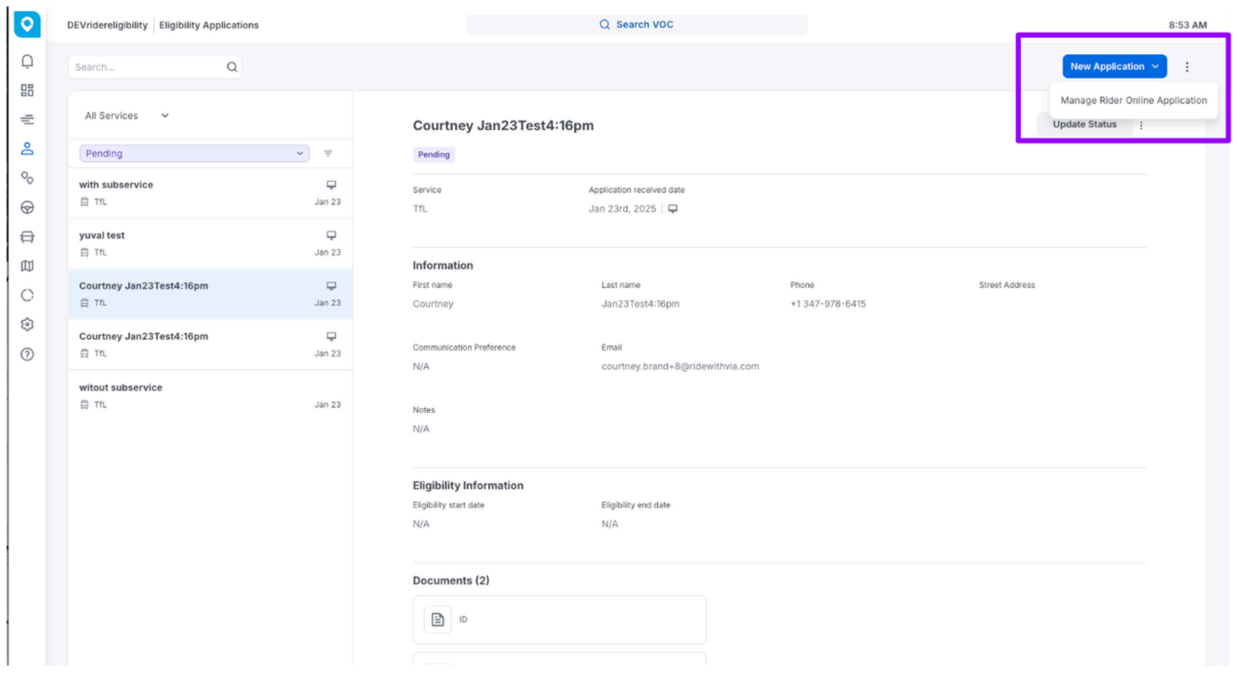
** Online rider applications are only received if the online portal is configured.*

How it works:

- You can review new pending applications at the cadence that makes sense for your team (daily, weekly), and update and track application statuses as needed.
- Riders will be automatically created in the Rider Management Page when their applications are submitted, but will not be able to book rides on closed services until their application has been approved.

How to set up the online application portal:

1. Select "**Manage Rider Online Application**" from the 3 dot menu on the top right of the page.

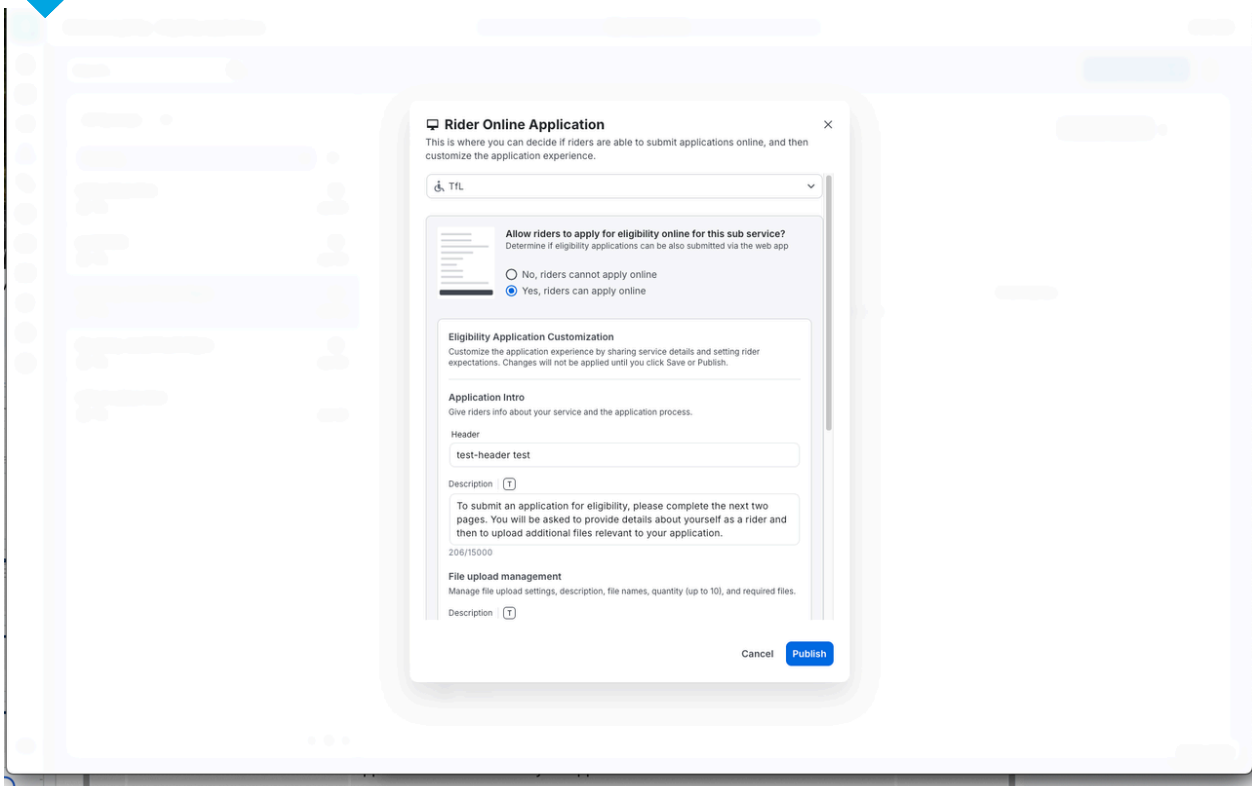


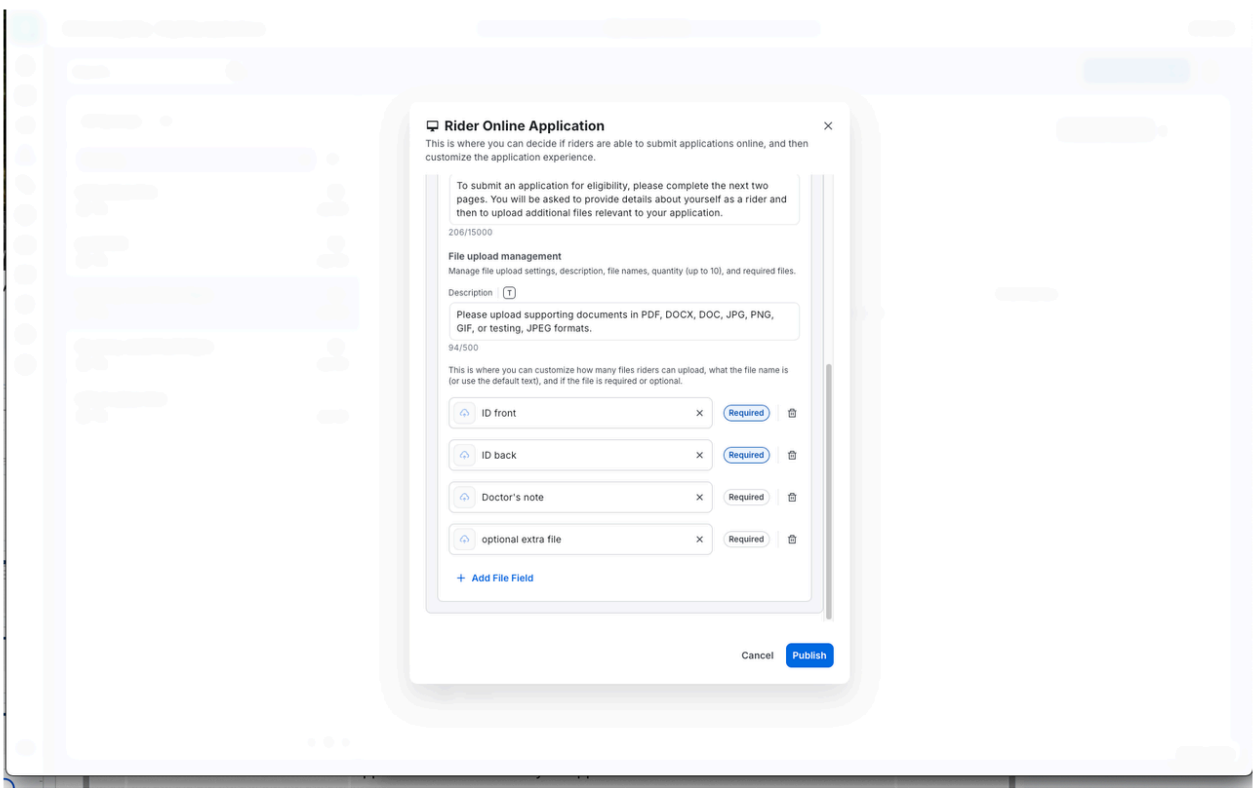
2. **Select the subservice** (if multiple).

    a. Decide if riders should be able to apply online or not (note changes will not be applied until you click Publish/Save).

    b. Customize:

        - Application Intro Text: Header (displays on first page)
        - Application Intro Text: Description (displays on first page)
        - File upload description: instructions text displayed on file upload page
        - Files: i.e. # of files (max of 10), file names, and what files are required vs optional (note: this will also update the view in the operator application flow)


Rider Online Application
This is where you can decide if riders are able to submit applications online, and then customize the application experience.
TfL
Allow riders to apply for eligibility online for this sub service?
Determine if eligibility applications can be also submitted via the web app
No, riders cannot apply online
Yes, riders can apply online
Eligibility Application Customization
Customize the application experience by sharing service details and setting rider expectations. Changes will not be applied until you click Save or Publish.
Application Intro
Give riders info about your service and the application process.
Header
test-header test
Description
To submit an application for eligibility, please complete the next two pages. You will be asked to provide details about yourself as a rider and then to upload additional files relevant to your application.
206/15000
File upload management
Manage file upload settings, description, file names, quantity (up to 10), and required files.
Description
Cancel
Publish


Rider Online Application
This is where you can decide if riders are able to submit applications online, and then customize the application experience.
To submit an application for eligibility, please complete the next two pages. You will be asked to provide details about yourself as a rider and then to upload additional files relevant to your application.
206/15000
File upload management
Manage file upload settings, description, file names, quantity (up to 10), and required files.
Description
Please upload supporting documents in PDF, DOCX, DOC, JPG, PNG, GIF, or testing, JPEG formats.
94/500
This is where you can customize how many files riders can upload, what the file name is (or use the default text), and if the file is required or optional.
ID front
Required
ID back
Required
Doctor's note
Required
optional extra file
Required
Add File Field
Cancel
Publish

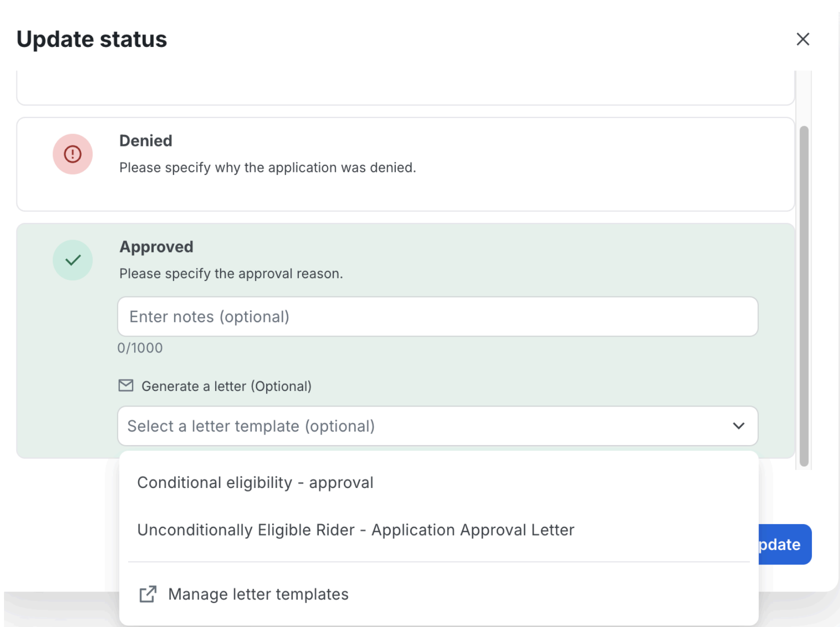
3. **Copy and publish the link** to the application portal on your website. When riders submit applications, they will automatically populate in the Eligibility Manager portal of the VOC for your review and approval.

Enable letter generation to speed up your workflow

Letter Generation allows for customization and templatization of application status letters, so you never have to write a letter twice. If sending application status letters to riders is part of your process, you can use Letter Generation to dynamically fill letter templates with rider information.

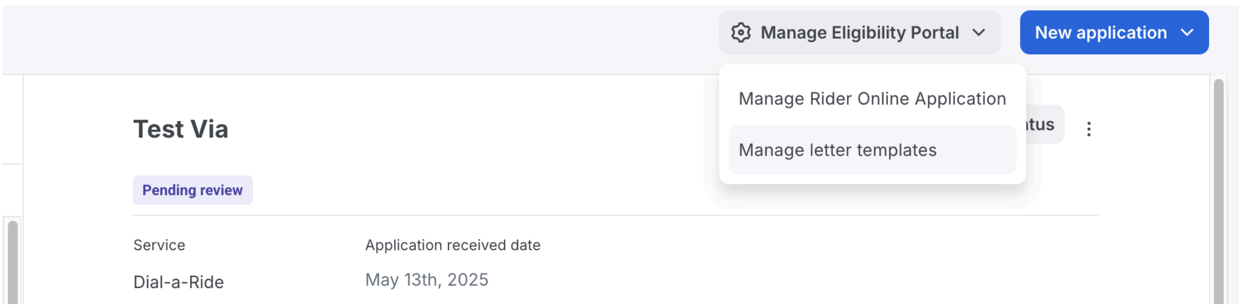
How it works:

- When updating a rider's application status, you have the option to generate a letter
- Select a template
- Click "**Update and Generate**"
- The letter will automatically generate and download with up-to-date rider information from their application
- Print and send the letter

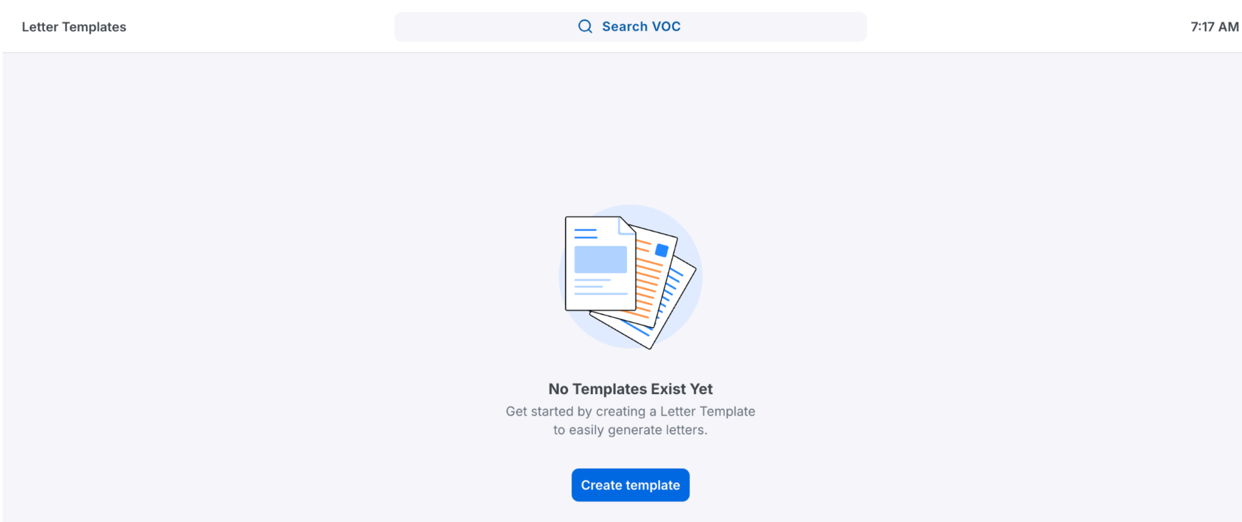


How to set it up:

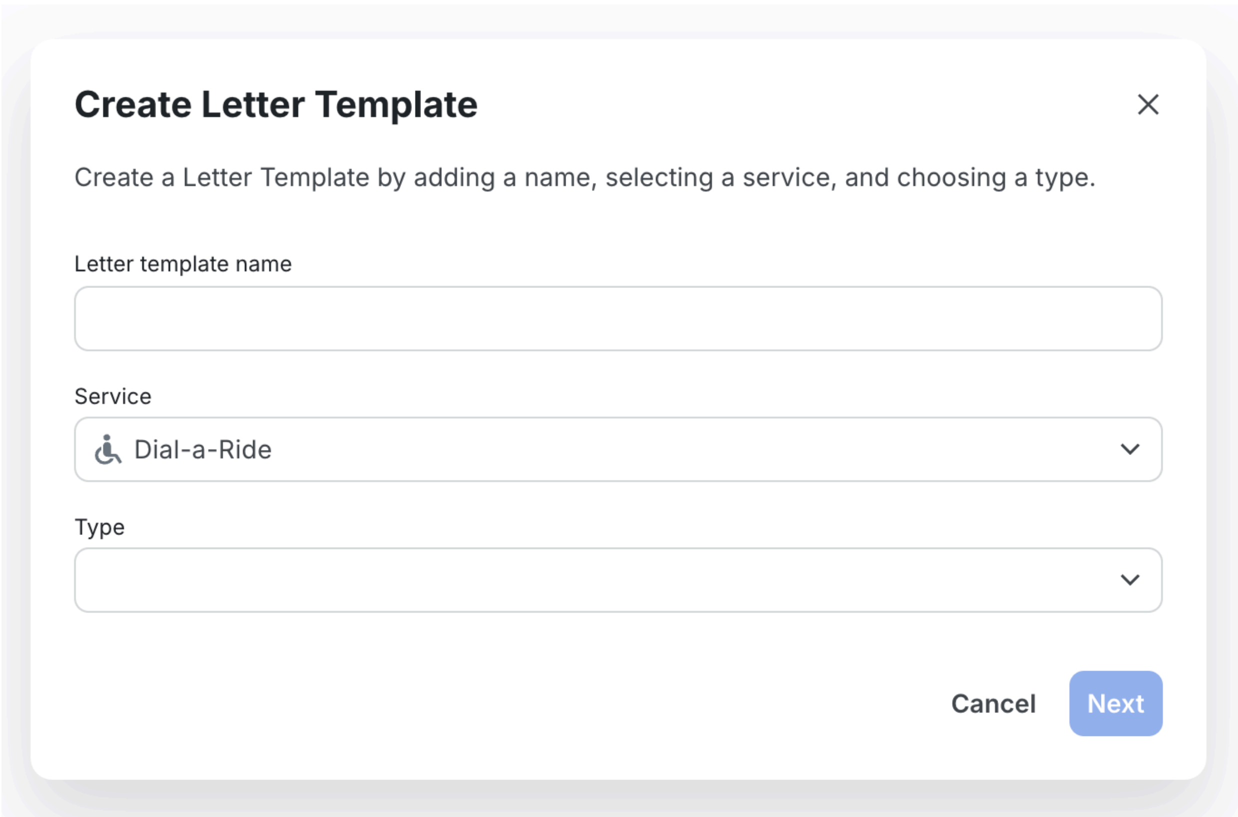
1. Navigate to the **Template Management Page** within the Eligibility Manager Portal



2. Click **“Create Template”**



3. Enter the **name, associate service, and template type**



4. **Customize your template** using the template editor

    a. **For existing templates**: copy and paste the template into the the template editor, make adjustments to font size / format / etc., and enter dynamic "Smart Text" fields that will automatically populate when you submit an application

    b. If you do not have any templates yet, you can use the default template as a starting point or create a new one directly from the template editor

    c. Add dynamic fields that will populate with each rider's information:

        i. Click "Smart Text" in the template editor

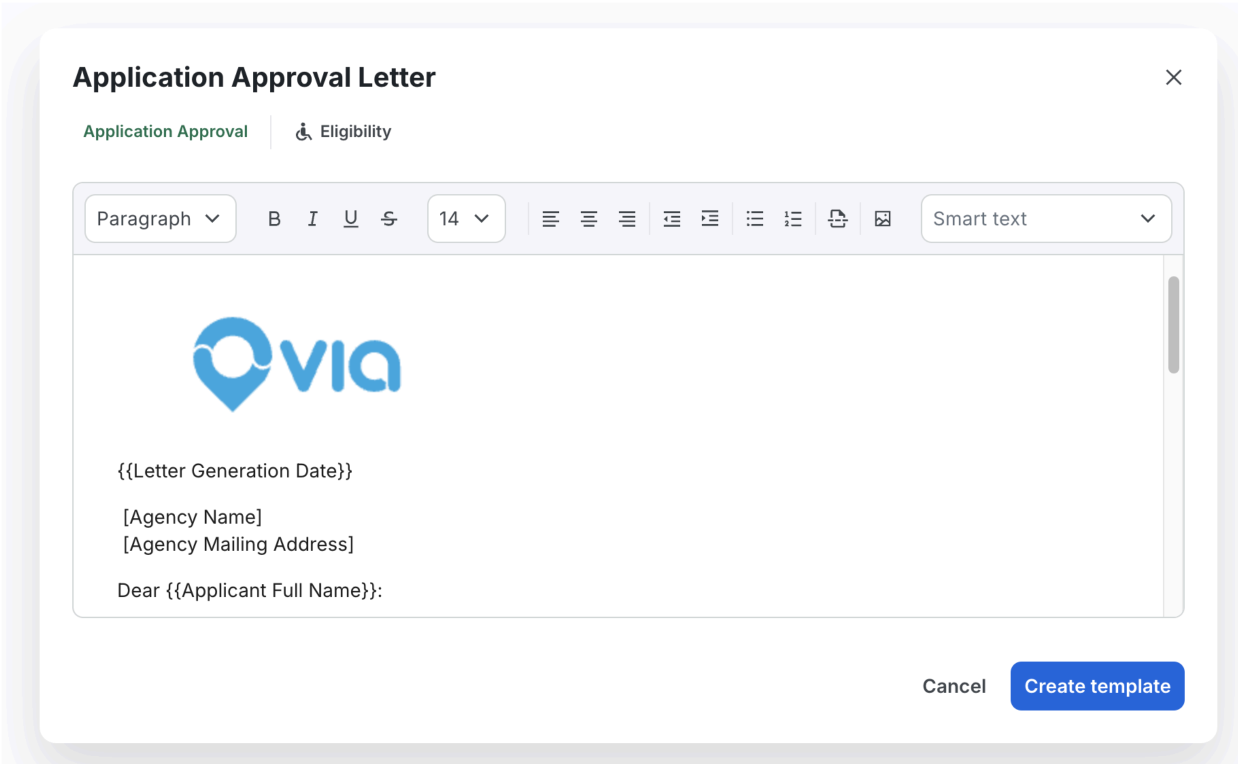
        ii. Select the field you want to add

    d. Add a logo or signature:

        i. Upload an image

ii. Drag and drop to the desired location in the template

iii. Resize as needed



5. Save your template!

6. **Create as many templates as needed.** We recommend at least one for each status (Approved / Denied / Missing Information). Other scenarios you may want to think about:

   a. Do you need different versions of your template to accommodate different disabilities? (i.e. a template with larger font for riders with eyesight impairments)

   b. Do you need different versions of a “Missing Information” template depending on the type of information needed from the rider? (i.e. doctor’s note, ID verification, etc)

   c. Do you need different versions of an approval template depending on the rider’s eligibility? (i.e. Conditional vs. Unconditional, Temporary vs. Permanent, etc)

Report on key KPIs for your process

Once you're all set up and you've started receiving applications, you'll want to be sure you can report on progress and key metrics. Use Via's Service KPI Dashboards and Data Generator to pull reports on application response velocity, volume of applications processed, upcoming rider eligibility renewals, and more.

Here is an overview of your available reports:

- Available Service KPI reports
  - Resolved Eligibility Requests - Number of requests that were resolved (approved or denied)
  - Request Backlog Snapshot - Number user eligibility requests that were outstanding on a given day
  - Received Eligibility Requests - Number of user eligibility requests received by current status
  - Request Resolution Velocity - Average number of days between request receipt and resolution
  - SLA Adherence - Share of user requests that were resolved within seven days or less
  - Eligible Riders - Number of riders eligible in each service on a given day
- Available Data Generator reports
  - Eligibility Requests - run reports on applications that were submitted
  - Rider Eligibilities - run reports on riders' eligibility details (eligibility dates, eligibility type, conditions, etc)

Next Steps

We hope you enjoy this update. Please share your feedback as you start using Eligibility Manager. We'd love to hear your thoughts!