



# Get to know *Improved "Check for Existing Rider" in the Eligibility Manager*

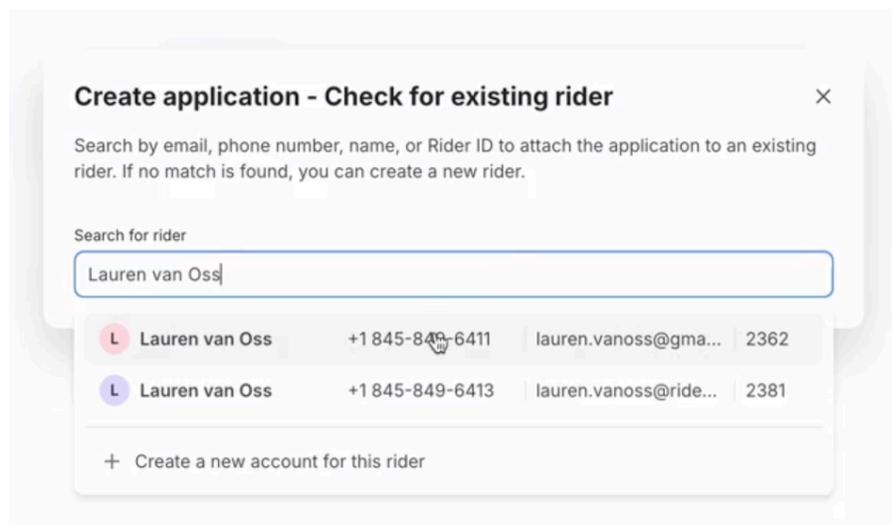
## What's new?

We've improved the "Check for Existing Rider" step in the Eligibility Portal's application creation flow. This update allows Eligibility Managers to search for existing riders using multiple parameters (like name and phone number in addition to email) and simplifies the workflow for finding riders who may not have an email address.

## How it works:

This feature streamlines the way your staff creates applications by making it easier to identify and link to an existing rider account.

- **Multi-Parameter Search:** When creating an application, you can now search for an existing rider using a broader range of parameters:
  - Email
  - Name
  - Phone Number
  - Rider ID
- **Improved Search Results:** The search results screen now displays the rider's Name, Phone Number, and Email Address. This helps your staff confirm a match when multiple results are returned (e.g., multiple riders with the same name).
- **Application Scanning Alignment:** These expanded search options are also available for manual checks during the Application Scanning process when the system cannot automatically identify a rider's unique ID.
- **Creating a New Rider:** If you do not find the rider that you are looking for, you can select "Create a new account for this rider" to add a new rider to the system.





## Keep in mind:

- This feature is only applicable for partners using the Eligibility Manager
- To ensure that users with the "Eligibility Manager" role can find any existing rider in the system (e.g., a microtransit rider applying for paratransit), their VOC account must be set up with access to view all services. Check your user's role settings by:
  - Navigating to "Configurations" > "User Management"
  - Search for the VOC user
  - Check that they have role "Eligibility Manager"
  - Check that Sub Service is set to "View All"

The screenshot shows a modal window titled "Edit User" with a close button (X) in the top right corner. The form contains the following fields:

- van Oss** (with an information icon)
- Email\***: lauren.vanoss@ridewithvia.com (with an information icon)
- Roles\***: EligibilityManager X
- Sub Service \***: View All X
- Vendors \***: (empty field)

At the bottom of the modal are two buttons: "Cancel" and "Save".



## 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!