

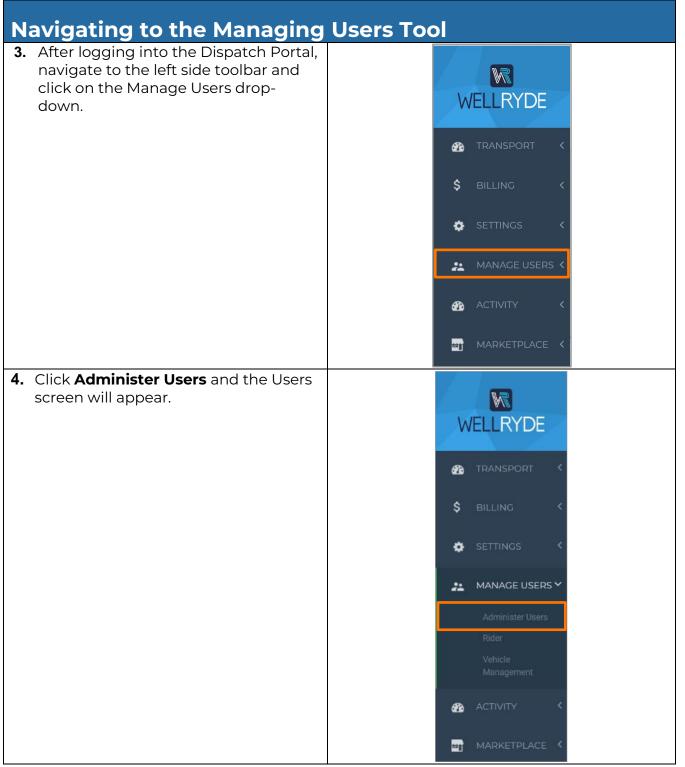
Overview

This job aid provides an overview of how to manage users in the WellRyde Dispatch Portal. You can complete the following task with this job aid:

- Navigating to the WellRyde Portal
- Navigating to the Managing Users Tool
- Filter the Users list
- <u>Review Users detail</u>
- Edit Existing Users and Manage their Record
- Password Reset Instructions
- Add a new User
- <u>Manage Users' documents</u>

Navigating to WellRyde Port	tal
1. Navigate to : <u>https://portal.app.wellryde.com/portal/</u> in your Google Chrome web browser, to access the WellRyde Dispatch Portal.	
Note : If you currently do not have Google Chrome installed on your computer, it is recommended to download it as it is the preferred browser to access WellRyde.	WELLRYDE
 Enter your company code, username and password, all of which will be provided to you upon your first-time logging in. The company code and your username are not case sensitive, but your password is. Then, click Login. 	Online Portal Login MoDIV John Dorgot your password? Cogin Not registered? Contact us to learn more.







Fi	lter the User List		
5.	The Administer Users page provides you with a number of options to search, filter and view users.	Ŀ	Search Current View Default Filter
	The page will automatically default to the Default Filter view, which can be found at the top of the Users page and is the same for every new user in WellRyde and cannot be edited.		Search Reset
	You also have the option to create a custom filter view and define the search criteria important to your organization. Creating custom filters helps to streamline your data, requires fewer keystrokes when searching and yields quicker search results.		
	To do so, click + Add New View		
6. 7.	For example, if you want to create a specific view to see all disabled drivers, first give your new view a name. Enter the name in the " View Name "	You	New View ou can use views to pick and choose the search filters and table columns you would like to use for this screen. You can have multiple views.
	field. In this case, we'll call it "Disabled Drivers".		View Name Disabled Drivers User Level
8.	 Next, define the View Level, which designates who can see the view. User Level is specific to you, whereas company level allows everyone in your company to see this view. 	Pic	Group Level Company Level Pick the search filters you'd like to be visible for this view. You can also put in a default search value for each filter as well. Add Search Filter
9.	Click " Add Search Filter " to select the specific data fields you'd like to be visible for this view in the Search box.	Pie	Search Filters Pick the search filters you'd like to be visible for this view. You can also put in a default search value for each filter as well. First Name Last Name Last
	For our disabled drivers, we'd like to filter by first name, last name and user enabled.	Pic	Add Search Filter Table Columns Pick and choose the information you like to include in your table. Once you have added columns, you can change the order in which they are displayed. Available Columns Included In Table



10. You can also put in a default search Search Filters Pick the search filters you'd like to be visible for this view. You can also put in a default search value for each filter as value for each filter as well by selecting an operator such as First Name like • Sam "like" • Last Name 0 Not Equal ✓ Sam "Like" prevents you from 0 Add Search Filter having to type out an **Table Columns** entire word. Pick and choose the information you like to include in your table. Once you have added columns, you can change the order in which they are displayed "equal" Available Columns Included In Table "Equal to" provides an 0 (none) exact data match Username Email User - Created Dttr ተ or "not equal". "Not equal to" is not 0 exact. For example, if the driver's first name is Samantha, including a "Like" search value of "Sam" is an easy and guick way to generate results without having to search for the full name. 11. Finally, you'll need to select table Table Columns Pick and choose the information you like to include in your table. Once you have added columns, you can change the columns. They allow you to pick and order in which they are display choose the information you'd like to Available Columns Included In Table include in your user table. User - Created Dttm Last Name 4 Locked Date of Birth For our Disabled Drivers, we'd like to 4 see the driver's username, first name, last name, email, if they are userenabled, if their account is locked and the last known vehicle. To ensure these columns are included in the table, simply click on one available column category at a time, then click the right arrow to move it to the Included in Table column. Repeat this process for each column you'd like to add. Use the up and down arrows on the right side of the Included in Table box to change the order in which the columns appear. We recommend placing the most important columns at the top of the list for easier viewing access on the user table.

Copyright 2021. All rights reserved. This document contains trade secret, confidential, and proprietary information. Neither this document nor the information it contains may be further disclosed without written permission.



12. To save the new filter view you just created, click Save Changes .	Table Columns Pick and choose the information you like to include in your table. Once you have added columns, you can change the order in which they are displayed. Available Columns Image: Constant of the provided in
13. After saving, you can easily apply the new view by clicking on the current view drop-down and selecting the new view's name.	Cancel Save changes Search Current View Default Filter Here Actions Username Email Username Current View
If you prefer to see this view all the time, make it your default view by clicking Make Default .	Search Reset
If you need to edit a viewClick on the Edit button to do so, make your adjustments, and then click Save Changes to apply your changes.	Are you sure you want to delete the view Active_Users? Cancel Delete
You can delete a custom view by clicking the Delete button.	
14. After you've applied a view, use the search box to easily find the data you need.	Search Current View Active_Users v Fait B Deinte Make Default + Add New View Username First Name Last Name User-Enabled is True v Search Reset
Enter your search in the designated boxes, then click Search to quickly generate results in the table below.	2 Users stAddWer(s) → Manage Documents Rule Formatter Column Search E Export → C Refresh Lat Send Message H < Showing 2 of 2 > H Results per page: 50 v Username ¢ First Name ¢ Last Name ¢ User Enabled ¢ Looked ¢ Divers Licent
For example, if we want to search for disabled drivers by the name of "Ryan", we can type "Ry" into the username field, click Search and find Ryan quickly.	Image: Instant Section 2010 Ryan Dot ✓ CD-13344 Image: Ima
15. To search specific data, use Column Search .	Search Current View Active_Users V FEdit Delete Make Default + Add New View Username First Name Last Name User-Enabled is True y
When clicking on this button, a search field will appear for each column shown.	Search Reset 2 USers e*Add User() Manage Documents Rule Formatic Column Bearch If Export Send Message H Send Message H Users Itemane First Name Lest Name User-Enabled Loked If yean designore.com Ryan If Ryan Ryan Barry M If Ryan Ryan Barry M If Ryan Ryan Barry M

modivcare

WellRyde Dispatch Portal – Managing Users

	Search Current View O Default Filter V Filt & Delete Make Default + Add New View V
	Username Email User - Created Dttm
Type in what you're searching for and	(None) ~
hit enter to narrow your search results.	Search Reset
The enter to harrow your search results.	
	15 Users Rule Formatter Column Search & Column Search & Column Search
	Send Message K
	Send Message K ≪ Showing 15 of 15 ► H Results per page: 50 ∨ Username ← First Name ← Middle Name ← Last Name ← Enable ← User-Finable ← Locked ← Credentialing Stat. Los
	Search Se
	1 il illennedine ultre nos il illennedineerone A.
	□ i junith Jack Smith junith@welfyde.com √* □ i jose Jobn Doe jdoe@welfyde.com √*
	□ [†] Patrice Patrice Rhymer Patrice.Rhymer@m √
	Disphraon Bill Johnson bjöhnson@wellyde. 🗸
	Search Current View Default Filter > Falt @ Delete Make Default + Add New View >
N N H H H H H H H	Username Email User - Created Dttm
Note : To organize your user list by last	(None) ~
name from A to Z, click on the up arrow in	Search Reset
the last name column to do so.	Search Reset
	15 Users
	Send Message
	□ Username
	Search Search Doe Search Search Search
	ingan.doe@n Ryan Doe ryan.doe@none.com injdoe John Doe idoe@invelt/vde.com
	De jdoe@wellyde.com
16. To export an item from the Dispatch	
Portal. click the Export button.	Search Current View Default Filter Search Add New View
Portal, click the Export button.	
•	Search Current View
This triggers a drop-down list to	Username Email User - Created Dtm
•	Username Email User - Created Dttm (None)
This triggers a drop-down list to	Username Email User - Created Dttm (None)
This triggers a drop-down list to	Username Email User - Created Dttm (None) ~
This triggers a drop-down list to	Username Email User - Created Ditm (None) Search Reset 15 Users erAdd User(r) • Manage Documents Rule Formatter Column Bearch @ Diport • C Refrech List
This triggers a drop-down list to	Username Email User - Created Dtm Search Reset 15 Users
This triggers a drop-down list to	Username Email User - Created Dttm (None) ~ Search Reset 15 Users Manage Documents Rule Formatter Column Barch [ff Eport +] Refresh List Selected Users(1)
This triggers a drop-down list to	Username Email User - Created Ditm (None) Search Reset IS User's etXed User() Manage Documents Rule Formattier Column Search Ef Export C Refrech List Selected Users(1) End Manage Username Final © User-Enable © Locked © Credentiaing Stat. Lice Search
This triggers a drop-down list to	Username Email User - Created Dtm None) ~ Search Reset 15 Users
This triggers a drop-down list to	Username Email User - Created Dtm (None) ~ Search Reset 15 Users
This triggers a drop-down list to	Username Email User - Created Dtim (None) ~ Search Reset 15 Users
This triggers a drop-down list to appear. Note : You can either export the list to	Usernane Email User - Created Dttm (None) Search Reset 15 USers
This triggers a drop-down list to appear. Note : You can either export the list to PDF or to Excel and save it to your	Username Email User - Created Dttm (None) (None) Search Reset 15 Users stAdd User(r) Manage Documents Bule Formater Column Barch C Poort C Refrech List Selected Users(1) Earth Earth Date Date C Date
This triggers a drop-down list to appear. Note : You can either export the list to	Username Email User - Created Dtim (None) ~ Search Reset 15 Users
This triggers a drop-down list to appear. Note : You can either export the list to PDF or to Excel and save it to your	Username Email User - Created Dttm (None) ~ Search Reset 15 USers gt/dd User() Manage Documents Rule Formative Column Starth (* Export) C Refrech List Selected Users()) were mail (* Email (* Export) C Refrech List Selected Users()) were mail (* Email (* E
This triggers a drop-down list to appear. Note : You can either export the list to PDF or to Excel and save it to your	Usernane Email User - Created Dtm (None) ~ Search Reset 15 USers
This triggers a drop-down list to appear. Note : You can either export the list to PDF or to Excel and save it to your	Username Email User - Created Dttm (Vone) Vone 15 Users x*Add ther(r) Manage Documents Bale Formatter Calum Search C Export C Ended List Search Reset Search Search Description C Ended
This triggers a drop-down list to appear. Note : You can either export the list to PDF or to Excel and save it to your	Usersame Email User-Created Dttm (None) (None) Search Reset 15 Users xtAdd User(r) Manage Documents Bule Formatie: Column Search Selected Users(1) Email User-Created Dttm Username Pert Name Manage Documents Bule Formatie: Column Search Username Pert Name Manage Documents Bule Formatie: Column Search Column Search Search Resert Bearch Bearch Bearch Bearch Feelpeint Search Current View Defaul Filer Z Ed Delete Add Delux + Add New View Username Email User-Created Dtm Image Documents Referentiate Column Search Faunt + Add New View Username Email User-Created Dtm Image Documents Referentiate Column Search Faunt + Add New View Image Documents Referentiate Column Search Faunt + Add New View Image Documents Referentiate Column Search Faunt Faunt Faunt Faunt Faunt Faunt Fa
This triggers a drop-down list to appear. Note : You can either export the list to PDF or to Excel and save it to your	Username Email User-Created Dtm (None) Search Reset Selected Users(1) Eend Massage User Search East East East East Count Search Exact Count Search East Count Search East Count Search East East East East East East East East
This triggers a drop-down list to appear. Note : You can either export the list to PDF or to Excel and save it to your	Username Email User-Created Dtim (Vone) (Vone) Search Reset 15 Users xtAdd User(r) Manage Documents Bule Formater Column Search C Sport + C Search User Selected Users(1) Email User-Created Dtim C column Search Email User Search Selected Users(1) Email Date Date Date Email
This triggers a drop-down list to appear. Note : You can either export the list to PDF or to Excel and save it to your	Username Email User-Created Dtim (Vone) (Vone) Search Reset 15 Users xtAdd User(r) Manage Documents Bule Formater Column Search C Sport + C Search User Selected Users(1) Email User-Created Dtim C column Search Email User Search Selected Users(1) Email Date Date Date Email
This triggers a drop-down list to appear. Note : You can either export the list to PDF or to Excel and save it to your	Usersame Email User-Created Dttm (None) (None) Search Reset 15 Users xtAdd User(r) Manage Documents Bule Formatie: Column Search Selected Users(1) Email User-Created Dttm Username Pert Name Manage Documents Bule Formatie: Column Search Username Pert Name Manage Documents Bule Formatie: Column Search Column Search Search Resert Bearch Bearch Bearch Bearch Feelpeint Search Current View Defaul Filer Z Ed Delete Add Delux + Add New View Username Email User-Created Dtm Image Documents Referentiate Column Search Faunt + Add New View Username Email User-Created Dtm Image Documents Referentiate Column Search Faunt + Add New View Image Documents Referentiate Column Search Faunt + Add New View Image Documents Referentiate Column Search Faunt Faunt Faunt Faunt Faunt Faunt Fa



Review User Detail	
17. To view details for a specific user, search for or find the individual's name within the user list.	
Next, you can either click on their username or the three vertical dots next to their username.	15 Users ±^Add User(a) Manage Documents Refresh List Selected Users(1) Send Message Username First Name Variable Search Search Search Search Search Search Search Search Jone ryan.doe@n- Ryan Doe idee Jone Idee
18. When clicking the 3 vertical dots, the menu option will appear.	15 Users stAdd User(s) Manage Documents Rule Formatter Column Search Selected Users(1) Selected Users(1)
 19. Select Details on the menu Note: A user's profile page provides additional insight into their assigned roles, details, message history and login history. Message history displays messages to the user from the Dispatch Portal, while the login history displays every instance the user has logged into the Dispatch Portal within the last 7 days. 	15 Users 2+Add User(a) Manage Documents Refresh List Selected Users(1) Send Message Details ame Middle Name Last Name Email User-Enabled Edit h Search Search Search Doe idde John

modivcare

WellRyde Dispatch Portal – Managing Users

Edit Existing Users and Mana	age their Record
20. To edit and manage a user's profile page click Edit Profile	Home / Users / Ryan Doe Ryan Doe Optimized in Stat. Juli 17 2021 at 16:18:52 Created On Sat. Juli 17 2021 at 16:18:52 Edit Profile Optimized in Sat. Juli 17 2021 at 16:18:52 Created On Sat. Juli 17 2021 at 16:18:52 Center of Male Account Locked? no Gender Male Address1 Unable to use app? no Melp
 21. To unlock a user's account and reset their password, first navigate to "Account Locked" toggles to turn it from on to off, then click Save Changes. For example, if you wanted to change a driver's last name from Forester to Johnson, do so in the last name field. If the user role is a driver, include the user's Driver's License Number (this will go in the CDL Number data field), License State and License Expiration Date. 	Home / Users / Edit User Save Change Cancel First Name * Ryan Profie Picture Change Middle Name Doe Vehicle identification number (VIN) G48MV4JDIQ7ESLA1 Username * ryan.doe@none.co Change CDL Number CD-1334s Paseword * Change License Authority Reset Email * ryan.doe@none.com License Estate Icense State User Phone Number 555-5555 Password Never Espiration Date mm/dd/yyy SSN 222222222 Inable to use are 2 OF
Note : These changes must be saved first before assigning a user a driver role. Then, ensure all other fields containing a red asterisk are filled in, and click Save	
Changes to update the record. Password Reset Instructions	
22. To reset a user's password. Click Edit Profile again and click Change next to the Password field.	Home / Users / Edit User Changes Cancel Edit Profile Indicates required details
Note : A password must be 8 characters in length, is case sensitive and cannot contain any special characters or numbers. After designating a new password, click Save Changes again.	First Name * Ryan Profile Picture Change Middle Name * Doe Vehicle identification number (VIN) G48M/W4UDIQ7TESLA1 Username * ryan.doe@none.co Change CDL Number CD-1334s Password *



Add a New User	
23. To add a new user to the Dispatch Portal ensure you are on the Administer Users page within Manage Users.	WELLRYDE
Note : Imported users are typically only Modivcare credentialed drivers.	 TRANSPORT BILLING SETTINGS MANAGE USERS ~ Administer Users Rider Vehicle Management ACTIVITY ACTIVITY
	MARKETPLACE <
24. Click +Add User(s), then Create New User.	Home / Users Import Search Current View Default Filter Zatt Default and Default Add New View Username Email User - Created Ditm
Note : When creating a new user for an Admin, fill in all fields with a red asterisk under the profile details.	Search Reset 15 USers gt/dd Userd) Menage Documents Bule Formatter Column Search © Export > Ø Menage Documents Search Reset Search Reset Search Reset I Search Reset <

Wellkyde Dispateri Portai -	
	Home / Users Import
	Search Current View 🛛 Default Filter 🗸 🖌 Edit 👔 Delete Make Default + Add New View 🗸
	Username Email User - Created Dttm
	Search Reset
	15 Users 2*Add User(s) > Manage Documents Rule Formatter Column Search Column Search Column Search
	Create New User Upload User(s)
	Rend Message K = Showing 15 Of 15 H Results per page: 50 Username Demane Demanee Demaneee Demaneee Demaneeeeeeeeeeeeeeeeeee Demaneeeeeeeeeeeeeeeee
	📄 🕴 njan. đoleljin Ryan Doe njan. doleljinone.com 🗸
	I junih Jack Smih junih@velkyk.com v ² D Help
25. Scroll down to assign user's role(s).	Home / Users / Create New User Create User Cancel
Select the role and click on the arrows	User Roles
to assign specific User Roles.	Available Selected
	Filter Filter
Click the Create User button	→→
	HOS_Driver Member_App Account_CSR D_Biller
Note: Roles determine what access a user	DCBiller Account_Owner DWH_LUSER
has to WellRyde.	
	User Groups
There are 7 unique roles a user can be	Available Selected O Help
assigned to. Users can be assigned	Home / Users / Create New User Create User Cancel
multiple roles at once if they will serve	User Roles
multiple functions within your	
organization.	Available Selected
	rines
• Member Admin - Allows the user to	MemberAdmin User
add/maintain users and vehicles	DLIntegration DLIDispatcher DI User
within WellRyde.	DL_Driver GroupAdmin
• DI_Integration - Allows the user to	D_Inquiry -
perform integration with	
designated broker systems.	
For every plathic rate allows the	
For example, this role allows the connection between Circulation	
and WellRyde.	
•	
DI_Dispatcher- Allows the user to Section trips to a Driver's WellDyda	
assign trips to a Driver's WellRyde Mobile App	
• DI_Driver -Allows the user to access	
the WellRyde Mobile App to	
perform trips.	
• DI_User - Allows the user member	
admin access.	
• DI_Biller - Allows the user to	
perform extensive billing functions.	
Account Owner-Allows the user to	
subscribe to add-on modules and	

Copyright 2021. All rights reserved. This document contains trade secret, confidential, and proprietary information. Neither this document nor the information it contains may be further disclosed without written permission.

modivcare



purchase additional features within WellRyde.	
Manage Users' Documents	
26. To save captured documents to store against a driver or dispatcher's record, use the Manage Documents function to do so.	Home / Users Import Search Current View Default Filter VEst Default Make Default Add New View V Username Email User - Created Dttm Search Reset
Note : Navigate back to Administer Users and then click Manage Documents .	15 Users 2*Add User(i) 1 Manage Documents Rule Formatter Column Search 15 Epport Ø Reheah List Create New User User(i) H ≪ Showing 15 of 15 ▷ H Results per page: 50 ∨
 This allows your Admin to predefine required documents to be stored in the user's profile including: CPR certification driver's license COVID certification PPE certification 	□ Deername ○ Frant Name ○ Madde Name ○ Last Name ○ Deername □ Useded ○ Locked ○ Condentialing Stationary □ 1 ryan.dos@nam.com v²
27. You can make the document mandatory or optional for each user, then click Save.	Please choose the documents required Image: Cancel Document Name* Document Number Issue Date Expiry Date Picture Upload Mandatory Driver License Image: Cancel
Note : When a document is deemed mandatory, you cannot Save Changes unless all the information is filled in.	Add more Note: 2. Documents are only asked in case of Driver user role type.