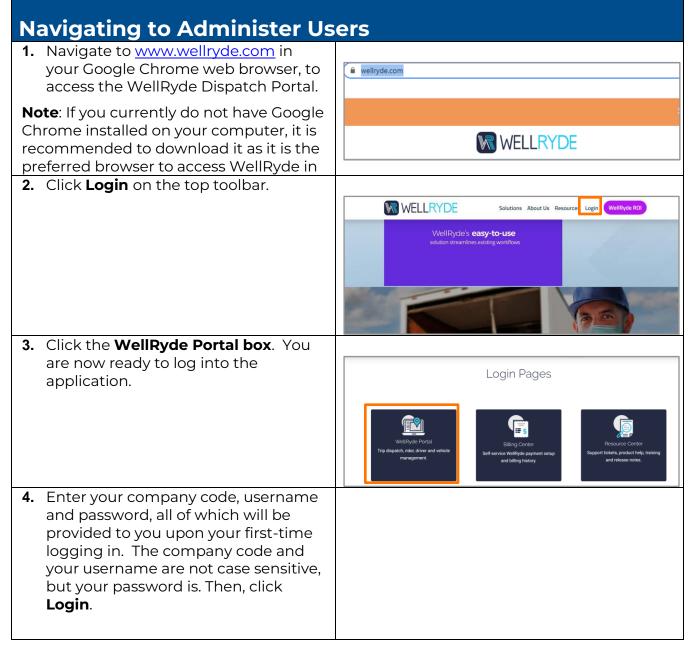


Overview

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:

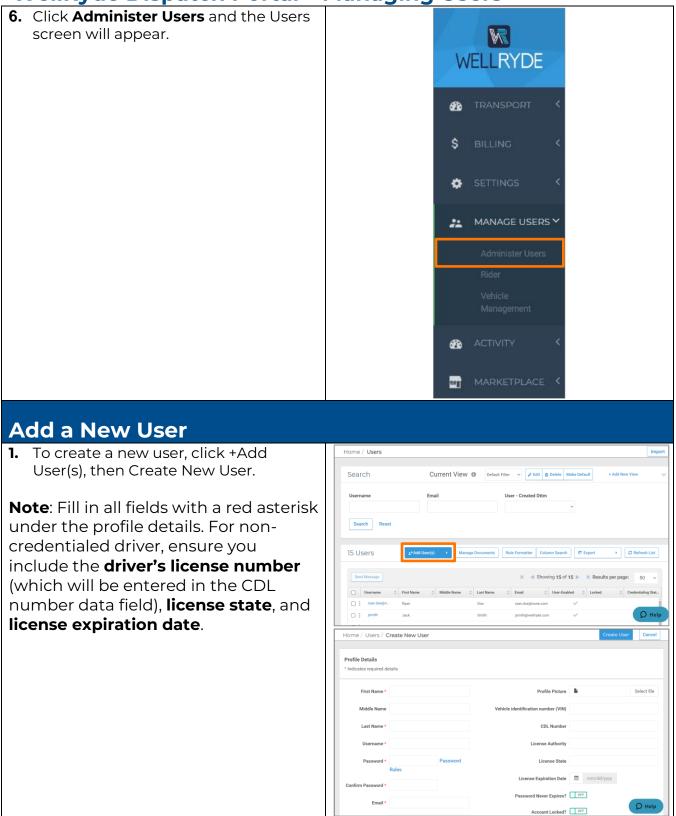
- Navigating to Administer Users
- Add a new User
- <u>Filter the Users list</u>
- <u>Review User detail</u>
- Edit an existing User and manage their record
- <u>Manage Users' documents</u>
- <u>Unlock Account and Reset Password</u>





Wennyde Dispater i ortar	
	Online Portal Login
	MODIV
	John 👗
	Forgot your password?
	LOGIN
	Not registered? Contact us to learn more.
5. After logging into the Dispatch Portal, navigate to the left side toolbar and click on the Manage Users drop-down.	Image: Section of the sec







	Home / Users
	Search Current View 🛛 Default Filter 🗸 🖌 Edit 👔 Delete Make Default + Add New View 🗸
	Username Email User - Created Dttm
	Search Reset
	15 Users (*Ad User(*) *) Manage Documents Ride Formatter Column Search (* Stoport *) (* Stepert *)
	Send Message M Showing 15 of 15 H Results per page: 60 Upload User(a) H Showing 15 of 15 H Results per page: 60 Upload User(a) H Isen Table 10 User-Enabled LackAd Credentialing Stat 1 rpss.dooijn Ppm Doe rpss.dooijn.com V
	D i jennh Jack Smith jenthýweityde.com √ D Help
2. 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.	Available Selected
	Filter Filter
Note : Roles determine what access a user	DLInquiny HOS_Driver
has in WellRyde. There are 7 unique roles a user can be assigned. Users can be	Member, App Account, CSR DL.Biller
assigned multiple roles at once if they will	Account Owner DWH USER DUGTE ANNUER
serve multiple functions within your	User Groups
organization.	Available Selected D Help
	Hitter Create User Create User Cancel
1. Member Admin- Allows the user to	
add/maintain users and vehicles	User Roles
within WellRyde.	Available Selected
2. DI_Integration- Allows the user to	Filter Filter
perform integration with	MemberAdmin User
designated broker systems. For example, this role allows the	DL_Integration DL_Dispatcher DL/User
connection between Circulation	DLDriver GroupAdmin DLInquiry -
and WellRyde.	D_inquiry
3. DI_Dispatcher- Allows the user to	
perform	
4. DI_Driver-Allows the user to access	
the WellRyde Mobile App to	
perform trips. For non-credentialed	
drivers, you must first create their	
profile with user details, then click	
Save Changes. After doing so, you	
can edit their profile to assign	
them their driver role.	
5. DI_User- Allows the user member	
admin access.	
6. DI_Biller- Allows the user to	
perform extensive billing functions. 7. Account Owner-Allows the user to	
subscribe to add-on modules and	



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WellRyde Dispatch Portal –	Managing Users
purchase additional features within	
WellRyde.	
3. Click Create User	Home / Users / Create New User Create User Cancel User Roles Available Selected Filter Filter WemberAdmin Filter DL_Integration DL/Spatcher DL/Jorer DL/Jorer DL/Jorer GroupAdmin DL/Integration Filter
Filter the User List	
1. The Administer Users page provides you with several options to search, filter, and view users. 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 Current View Default Filter Filter Edit in Delete Make Default Add New View View Username Email User - Created Dttm (None)
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	
2. For example, if you want to create a specific view to see all disabled users, first give your new view a name. Enter the name in the "View Name" field. In this case, we'll call it "Disabled Users". 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.	New View You 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. View Name Disabled User User Level Group Level Company Level Company Level Pick the search filters Pick the search filters Add Search Filter



3.	Click "Add Search Filter" to select the	Search Filters
	specific data fields you'd like to be visible for this view in the Search box. For our disabled users, we'd like to filter by first name, last name and user-enabled.	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 Kike Kike Kike
4.	You can also put in a default search value for each filter as well by selecting an operator such as "like", "equal" or "not equal". "Like" prevents you from having to type out an entire word. For example, if the driver's first name is Samantha, including a like search value of "Sam" is an easy and quick way to generate results without having to search for the full name. "Equal to" provides an exact data match, where "Not equal to" is not exact.	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 Ike Sam Last Name Not Equal Sam Add Search Filter Sam Image: Sam Table Columns Sam Image: Sam 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. Image: Sam Available Columns Included In Table Oriver Image: Sam Image: Sam Username Image: Sam Image: Sam User- Created Ditim Image: Sam Image: Sam
5.	Finally, you'll need to select table columns. They allow you to pick and choose the information you'd like to include in your user table. For our Disabled Users, we'd like to see the driver's username, first name, last name, email, if they are user-enabled, 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.	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. Mailable Columns Included In Table User-Created Dtm User-Standed Last Name User-Standed Date of Birth Created Otm Address1 Address2 City Created Otm



•		
6.	To save the new filter view you just	Table Columns Pick and choose the information you like to include in your table. Once you have added columns, you can change the
	created, click Save Changes.	order in which they are displayed.
		Available Columns Included In Table
		Email User-Created Dttm Last Name Locked Date of Bith Gender Address1 Address2 City
		Cancel Save changes
7.	After saving, you can easily apply the new view by clicking on the current view drop-down and selecting the new view's name. If you prefer to see this view all the	Search Current View Default Filter Edit @ Datete Make Default Add New View View Username Email Disabled Drivers reated Dttm
	time, make it your default view by clicking Make Default .	Delete View
	If you need to edit a viewClick on the Edit button to do so, make your adjustments, 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.	
8.	search box to easily find the data you need. Enter your search in the designated boxes, then click Search to	Search Current View Active_Users V Fait Doise Make Default + Add New View Username First Name Last Name User-Enabled is True y Search Reset
	quickly generate results in the table below. For example, if we want to	2 Users 21/Add User(s) • Manage Documents Rule Formatter Column Search 21 Export • 27 Refresh List
	search for disabled drivers by the	Bend Mexage H ≪ Showing 2 of 2 ▷ H Results per page: 50 🗸
	name of "Ryan", we can type "Ry" into	Username \Leftrightarrow First Name \Leftrightarrow Last Name \Leftrightarrow User-Enabled \Leftrightarrow Locked \Leftrightarrow Driver's Licens
	the username field, click Search and	□ 1 yran doeginone.com Ryan Doe √ CD1334s □ I Ryan Rean Gauvin √ 802722
	find Ryan quickly.	
9.	To search specific data, use Column	Search Current View 🕢 Active_Users 🗸 🖌 Edit 🗈 Delete Make Default + Add New View
	Search. When clicking on this button, a search field will appear for each column shown.	Username First Name Last Name User-Enabled is True ry Search Reset
	Type in what you're searching for and hit enter to narrow your search results.	2 Users ctAdd User(c) → Manage Documents Rule Formatile Column Search Cf Export → C Refreeh List Send Manage Documents Rule Formatile Column Search Cf Export → C Refreeh List
na	te : To organize your user list by last me from A to Z, click on the up arrow in a last name column to do so.	Utername ↓ Pirk Name ↓ Last Name ↓ User-Enabled ↓ Locked ↓ Drive's Licent □ 1 ryan diseptons.com Rpan Doe √ Co1334s □ 1 Rpan Gauvin √ R62272



	Search Current View 💿 Default Filter 🗸 🛃 😰 Delete Make Default + Add New View 🗸
	Username Email User - Created Dttm
	(None) ~
	Search Reset
	15 Users (************************************
	Send Message K K Showing 15 of 15 K K Results per page: 50 V
	Username 5 First Name 5 Holde Name 5 Last Name 5 Enail 5 User-Chabled 5 Locked 5 Ordertailing Stat. Lice Faurch Search Search Search Search Search Search Search Search
	Search Se
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	0 100e Jobn Doe jdoegwelkyde.com √ 0 0 Patrice Reymer Patrice.Reymergim. √
	📑 tejohason Bili Jahrson kejohasongiwelityde. 🗸 💭 Helip
	Search Current View Default Filter V Edit @ Delete Make Default + Add New View V
	Username Email User - Created Dttm
	(None) ~
	Search Reset
	15 Users
	L ^t Add User(s) → Manage Documents Rule Formatter Column Search C Refresh List
	Send Message
	Username \Leftrightarrow First Name \Leftrightarrow Middle Name \Leftrightarrow Last Name \clubsuit Email \Leftrightarrow User-Enabled \diamondsuit Locked
	Search Search Doe Search Search Search
	International Processing Strategy
	☐ jdœ John Doe jdœ@wellyde.com
10. To export an item from the Dispatch	
Portal, click the Export button. This	Search Current View 💿 Default Filter 🗸 🖍 🖞 Default Budete Make Default + Add New View 🗸
triggers a drop-down list to appear.	Username Email User - Created Dttm
	(None) ~
Note : You can either export the list to	Search Reset
PDF or to Excel and save it to your	
computer for your records.	15 Users 2*Add User(s) Manage Documents Rule Formatter Column Search C Export D Refresh List
	Selected Users(1)
	Send Message
	Upersame
	Image: The second s
	Search Current View O Default Filter V Z Edit B Default + Add New View V
	Username Email User - Created Dttm
	Search Reset
	15 Users Chief User() Mesage Documents Tude Formatter Column Search 27 Export (2) Refresh List
	Export to PDF
	Selected Users(1) Export to Exed
	Sond Mensop Uterrame First Name Middle Name Exatl UterrEnabled Locked Oredestailing Stat. Uter
	Username First Name Modific Name Earl Name Final User Enabled Coded Credentiling Stat. Lee Search Search </th
	Image: Types.deegen. Ryun Doe ryun.deeginome.com V Image: Types.deegen. Provide Image: Types.deegen. Provide Image: Types.deegen. V Image: Types.deegen. Image: Types.deegen. Image: Types.deegen. Image: Types.deegen.dee
Poviow User Detail	
Review User Detail	

1. To view details for a specific user, search for or find the individual's

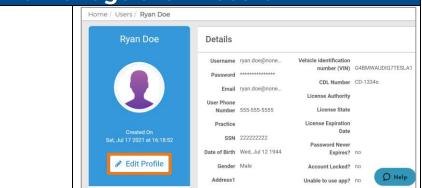


name within the user list. Next, you can either click on their username or the three vertical dots next to their username.	15 Users
2. When clicking the 3 vertical dots, the menu option will appear.	15 Users t*Add User(a) t*Add User(a) C Refresh List Selected Users(1)
3. Select Details on the menu Note: 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(s) Manage Documents Rule Formatter Column Search Export © Refresh List Selected Users(1) Image: Details Image: Details Image: User-Enabled Edit Image: Search Search Search Send Message Doe ryan.doe@none.com Image: Help Image: Idee John Doe Idee@wellowle.com

modivcare

WellRyde Dispatch Portal – Managing Users

Edit an Existing User and Manage their Record



Manage Users' Documents

1. To save captured documents to store against a driver or dispatcher's record, use the **Manage Documents** function to do so.

Note: Navigate back to **Administer Users** then click **Manage Documents**. This allows your Admin to predefine required documents to be stored in the user's profile including CPR certification, driver's license, COVID certification or PPE certification.

2. You can make the document mandatory or optional for each user, then click **Save.**

Note: When a document is deemed mandatory, you cannot **Save Changes** unless all the information is filled in.

Search	Current View	Default Filter 🗸 🗸	🖋 Edit 📋 Delete	Make Default	+ Add New View	
Username	Email	User - Cre	ated Dttm			
				~		
Search Reset						
15 Users	+Add User(s)	cuments Rule Forma	tter Column Sea	rch 😢 Export	C Refres	n List
	reate New User					
Send Message	pload User(s)	к	 Showing 15 	iof 15 🕨 🕺 Re	sults per page: 50	~
Username 💠 First	Name	ast Name 💠 Email	User-	Enabled 😄 Lock	ed 💠 Credentialir	ng Stat.
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<u></u>						
N				1	🖹 Save Cano	
rease choose the	documents required				Cano	
Document Name *	Document Number	r Issue Date	Expiry Date	Picture Upload	Mandatory	

O Add more

Entries marked as 'Mandatory' will be necessary to be filled under the form
 Documents are only asked in case of Driver user role type.

Unlock Account and Reset Password

 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

Home / Users / E	dit User			Save Changes	Cancel
First Name *	Ryan		Profile Picture	Change	
Middle Name				•	
Last Name *	Doe		Vehicle identification number (VIN)	G4BMWAUDIQ7TESLA1	
Username *	ryan.doe@none.co	Change	CDL Number	CD-1334s	
Password *		Change	License Authority		
	Reset		License State		
Email *	ryan.doe@none.com	1			
User Phone Number	555-555-5555		License Expiration Date	mm/dd/yyy	
			Password Never Expires?	OFF	
Practice	None	Ý	Account Locked	OFF	
SSN	222222222				D Help



Number data field), License State and License Expiration Date.	
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.	
2. To reset a user's password. Click Edit Profile again and click Change next to the Password field.	Home / Users / Edit User 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 Middle Name Profile Picture Last Name* Doe Vehicle identification number (VIN) G48MWAUDIQ7TESLA1 Username* ryan.doe@none.co Change CDL Number Password* Change Hest License State
	Email * ryan.doe@none.com