



TriMet LIFT Customer Permanently Changing Personal Name Policy and Procedures

Purpose

To define the method in which a TriMet LIFT customer may permanently change their name and the procedure for LIFT Customer Service, LIFT Operations and the TriMet Transit Mobility Center (TMC) employees must use in order to implement such a change.

Scope

This policy applies to all eligible LIFT Customers. The procedures listed must be followed by any employee of TriMet LIFT or its contractors who may be tasked with making these changes to the customer's records and current databases or informing the customer of the process.

Policy

Customers who wish to change their name must mail, email or fax the **LIFT Customer Name Change Form (LCNC)** along with an image or photocopy of one or more of the following official documents:

- Final court decree of name change
- Marriage certificate
- Divorce decree
- State driver license or identification card
- Passport

These document(s) should be delivered to the Transit Mobility Center (TMC) at the following addresses or fax number:

TriMet Transit Mobility Center
515 NW Davis St.
Portland, OR 97209
Fax: 503-962-8229
Email: lifteligibility@trimet.org

If these documents are delivered or faxed to the Nela address, please interoffice mail them to the TMC.

LIFT Customer Service when speaking with the customer should inform them of the process and then offer to send them a LCNC form for the customer to fill out.

Procedure

A designated TriMet employee at the TMC will receive the documents and check to make sure they are valid and genuine and then perform the following steps:

- Scan all documents so as to have a PDF version
- Pull the customer's physical file and add the original documents to the file.
- Open Smartsheet labeled "LIFT Customer Name Change," and enter customer information attaching the PDF versions of the documents from the customer along with the date received in the comments section.
- Open the customer's file in CERT and change the name of the customer noting the change along with the date in the Comments tab using this format – "Change name from XXXXX to XXXXXX. Documentation on file @ TMC (date)" and the three initials of the person who changed the file with a semi colon at the end to separate for future notes.
- Change customer's name in EPOS and make a notation in the remarks box on the "Customer" tab.
- Send email to TriMet Ticket Office (TTO) informing them of the change.
- Email LIFT Customer Service, LIFT Scheduling and cc the LIFT Service Quality Administrator (SQA) with the LCNC form attached
- Inform customer by telephone, email or letter that the changes have been made and they will have to request a new hop card through the TTO.

After receiving the email with the LCNC form attached the following will take place in LIFT Operations:

- LIFT Customer Service will add the new name to the Service Improvement Process (SIP) database – Currently the SIP system does not allow for name changes so a note will have to be added about the name change.
- LIFT Scheduling will update any subscription rides.
- The SQA will update the Warnings and Suspensions Smartsheet if necessary.