ORCA LIFT Fare Registry Users Guide

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INTRODUCTION

Welcome to the ORCA LIFT Fare Registry System!

ORCA LIFT is Metro's reduced fare program providing reduced transit fares for qualified individuals. User's fares can be paid with an ORCA LIFT card, registered and issued to each user. The card is good for up to two years. Metro, Kitsap Transit, Sound Transit, King County Water Taxi, and Seattle Streetcar service all honor the reduced fare.

This Registry allows you to search for existing card holders, add new ones, issue ORCA LIFT cards, and manage agency information (with the right permissions). This guide will help you get familiar with the application. If you have any questions, please contact King County Metro Customer Communications and Services (CCS) by phone (206) 477-4553 or email CCSHELP@kingcounty.gov .

What's new?

- The ability to edit cardholder information after a field has been saved
- The ability to renew and assign a new card with the same Lift ID as the old one
- New drop down selections for demographics
- New confidentiality check box at sign in
- New online Agency and Card Holder confirmations that replace paper copies and the Client Consent form
- Agency Administrator Portal user section

Logging in and out

Logging in for the first time

To access and use the ORCA LIFT Fare Registry online system, you will need to have received an email from CCS that contains your **User Name**, **Temporary Password**, and a **link** to the online system. If you have not received this information, check with your Agency Administrator to determine if your credentials have been entered into the system and if needed, request them from CCS.

If you have the email from CCS, click on the link in the email. Your browser will open and navigate to the site. If you don't have the email, but have your User Name and Temporary Password, open a browser on an internet accessible device and navigate here:

https://blue.kingcounty.gov/metro/orcalift/default.aspx

The first screen you will see looks like this:

Enter the supplied User Name and temporary password in the correct fields, check the **Agree**? box then press the **Log In** button.

Note: If you forget your password, use the **We will email you a new one** link to request a new password. You will need to know your User Name, and the email address that is associated with your account to have a new temporary password sent to you.

Logging out

You can log out of the system by selecting the green **Logout** button on the left. This will return you to the Login screen.

Note: You are automatically logged out of the system after 15 minutes of inactivity. When you return to the application and attempt to do anything, you will be redirected to the login screen and asked for your User Name and Password again.

Changing your Password/Editing Profile

Setting up a new registry user password

The following step will only need to be performed the first time you log in, or after requesting a new Password from CCS.

Click on the **Your Profile** link on the left hand side of the page to get here:

Your Password must be changed the first time you log in to the system, or after you have requested a new Password from CCS. To change your password:

1. Enter your **Current** (temporary) password
2. Enter the **NEW Password**
   Note: Passwords are required to have:
   - 8 or more characters
   - contain at least one uppercase and one lowercase letter
   - contain at least one number
   - contain at least one special character ~ ! @ # $ % ^ & * ( ) _ - + = { } [ ]
3. Enter the **NEW Password** a second time in the **Confirm** box
4. Scroll to the bottom of the page and select the **Update Your Profile** button.
5. The system will give you a success message indicating that your profile has been updated and an email will be sent to you confirming that your password has been changed.
6. If there is any error in entering the old password, or the new passwords do not match, or you do not meet the new password requirements, the system will give you an error message indicating what needs to be fixed.

Changing your existing password

You can change your password at any time by logging in to the ORCA LIFT Fare Registry and selecting the **Your Profile** link on the left. Follow the instructions above to change your password. **New passwords cannot match any of the 7 previously used passwords.** This means you must use 7 different passwords before you can re-use your initial password.

Password expiration

User passwords must be renewed every 90 days. When logging in near the end of the 90 day period, you will receive a warning that your password will be expiring soon. **Your account will be locked if you do not change your password before it expires**. Email CCSHelp@kingcounty.gov or call 206-477-4553 to unlock your account.

Updating your profile

You can update most of the information in your profile at any time by logging into the ORCA LIFT Fare Registry and selecting **Your Profile** from the links on the left.

The following is a list of fields in **Your Profile**:

Agency This is the one you are assigned to, and cannot be changed. If it is incorrect, notify CCS immediately to have your account assigned to the correct agency.

Work Title is optional and editable.

First Name and **Last Name** are required fields and should already be filled in with the information supplied to CCS at the time of your account creation. You can change these if necessary, but remember they will be the name appearing on the consent form that is printed when issuing a card.

Middle initial is also optional and editable.

Your Password see previous section.

Your Address should default to the address associated with your Agency. If you need a different contact address, select **No** from the **Use Agency Address** selection. You can then enter and save a different address.

Work Contact Phone If it is not filled in, you can enter a specific number at your work location. You can also include a **Work Alternate Phone** number (such as a cellular phone number) if necessary.

Work Contact Email should already be set, this is the email address the system will use in case you request a new Password. You can also include a **Work Alternate Email**, but it will not be used for any sort of automated communication from the system.

Once you have made changes to any of the fields above, select the **Update Your Profile** button at the bottom of the page (you may have to scroll down to see it.) The system will either give you a success message, or point out any errors such as missing required information.

Using the LIFT Registry

When issuing an ORCA LIFT Fare card to a customer (recipient) you will need the following information:

1. Do they already exist in the system?
2. If they do exist, do they already have a card issued?
3. If they have received a card, when does it expire?

- If they don't exist in the system, you will need to gather their **personal information** for entry into the system and verify their **Qualifying Documentation**.

Searching the registry for existing Card Holders

Before any new card can be issued, a search of existing Card Holders is required. To perform a search, you will need to select the **Search LIFT Registry** link on the left. This will bring up the following screen:

Existing LIFT Card Holder Search

All searches will include results that "sound like" the word you are searching for, but may have a different spelling. Add an * asterisk before the name to indicate any unknown letters.

*Full or Partial First Name :		Required. Minimum 2 letters
*Full or Partial Last Name :		Required. Minimum 2 letters

The below fields must match an existing record in order to be included in the results page. No partial matches will be returned.

Date of Birth (DOB) : Month / Day / Year clear selection
(if DOB is supplied, you may leave First Name blank)

5 digit Zipcode : Optional but Requires First and Last Name if used.

Card Serial Number : Optional. Overrides all other search filters. Exact match only.

Low Income Fare ID : Optional. Overrides all other search filters. Exact match only.

Search LIFT Registry

Pro tips:

Sometimes, less specific information will improve the chances of returning a match if one exists. More specific information such as DOB can be used to compare search results with information for the applicant. For uncommon names, try a search reversing the order of first and last names in case an error was made when a record was first created. Here are some combinations that can be used to search for existing records in the system.

- **Full First and Last Name**: You can enter the full First and Last Name of the customer. However, spelling must match exactly what is in the system in order to return any possible matches.
- **Partial First and Last Name**: If you enter a minimum of the first 2 characters of the recipient's First and Last Name, the system will automatically wildcard the remainder of the names and return anything that matches both the partial First and partial Last Name.
- **Last Name and Date of Birth**: If you have the recipient's Date of Birth and either full or partial Last Name, you can omit the First Name in a search.
- **Partial First and Last Name plus Zip**: If a search for First and Last Name returns too many matches, or a number of duplicate matches, you can add the recipient's Zip code to the search to narrow down the results. Remember Zip codes may change.
- **Card Serial Number**: If the recipient has an existing ORCA LIFT Fare Card, you can use just the 8 digit serial number on the card to find the recipient.
- **Low Income Fare ID**: If the recipient has a copy of their original letter of consent, it will include their LIFT ID number. This can be used by itself to find a specific recipient.

Once you have entered the data you wish to search for, press the Search LIFT Registry button. The next screen will either present you with matches to your existing search like this:

Or it will present with no matches returned and look like this:

In either instance, you have 2 options:
1. **Edit your search criteria:** If the recipient is certain they have registered before, you may need to try a different combination of information to try and find them again. You can repeat this process as many times as you need until you are satisfied the customer does not exist in the system.
2. **New Card Holder Registration:** If no matches are returned, and the recipient is indeed new to the system, select this button and proceed to the Card Holder Registration page.

Registering New LIFT Card Holders

Once you select New Card Holder Registration, you will be taken to this screen:

Below is a brief description of the fields:

- **Recipient's First Name**: This field is required. It will auto-populate from your previous search criteria, but can be edited. Enter the recipient's legal first name as it appears on the documentation provided.

- **Recipient's Last Name**: This field is required. It will auto-populate from your previous search criteria, but can be edited. Enter the recipient's legal last name as it appears on the documentation provided.
- **Middle Initial**: This field is optional.
- **Date of Birth**: This field is required. Enter the recipient's Date of Birth as it appears on whatever documentation they provide.
- **Qualifying Document**: This field is required. Select the qualifying document the recipient has provided from the dropdown list.
- **Document ID Number**: This field is optional. If there is a Document Identification number or reference code, it can be entered here.
- **Personal Identification type**: This field is required. Select the identification type provided.
- **Personal Identification Number**: Enter the identification number for the personal identification document provided. For example, use the driver's license number if the recipient used their driver's license to verify their identity.
- **Race:** This field is required but applicants have the option to select "not specified." Select the race of the recipient from the drop down menu**.**
- **Primary Language:** This field is required but applicants have the option to select "not specified." Select the primary language of the recipient from the drop down menu.
- **Household Size:** This field is required.
- **Notes:** Use this field to add any notes needed.
- **Recipient's Address:** Enter the holder's mailing address. If they do not have a mailing address you may enter "homeless" as the address and city. (*Note: Addresses are automatically validated against the USPS database. If an address does not validate, you can still save it, but delivery of any important documentation cannot be guaranteed.*)
  - **Mailing Address:** This field is required. Enter the address provided by the recipient or "homeless".
  - **Mailing Address 2:** This field is optional.
  - **Mailing City:** This is a required field and "homeless" may be used.
  - **Mailing State:** This is a required field. If other than Washington, select from the dropdown.
  - **Mailing Zip:** This is a required field. Enter the 5 digit Zip Code.
- **Contact Preferences:** Enter contact information.
  - **Voice Phone Number**: Enter a 10 digit phone number. Your browser should automatically format the number to look like (XXX) XXX-XXXX.
  - **Receive Emails**? If you select yes, the recipient can opt-in to receive Emails.
  - **Recipients Email address**: If you selected yes, enter the recipient's Email address. If the applicant does not have an Email address, you must check "no" in the "Receive Emails" field.
  - **Receive Text Messages?** If you select yes, the recipient can opt to receive text messages by providing a compatible phone number. If the applicant does not have a phone, you must check "no" in the "Receive Text Messages" field.
  - **Cell Phone Number:** Enter the recipient's phone number here.
- **Agency Confirmation:** This is a required field, with three boxes that must be checked by the issuing agent attesting that the agent has confirmed the client's identity and eligibility, and that the customer has given their consent to the items listed in the customer confirmation field and understands that their card is for their use only.

Once you have filled in the required and optional information for the recipient. Select the **Submit and View Summary** button.   You will be presented with a summary page of the

information you just entered for the recipient. Carefully review the information, if anything needs to be changed, select the **Edit Registration** button at the bottom of the page to be taken back to the entry screen to make changes and resubmit.

When everything is correct, select **Submit Registration**. This will bring up a confirmation dialog box to let you know that once you submit, you cannot make any changes to the Card Holder's information until after the card has been issued. The system assigns the LIFT ID at this time.

Clicking **OK** in the dialogue box will take you to a similar summary screen with a success message.

Now just type the new card number into the card information field and click the **Save New Card** button.

After entering the Card Serial Number – the series of numbers on the left hand side of the card, you will see a confirmation message at the top saying your changes have been saved.

Documentation: By checking the three boxes under "Agency Confirmation" you are attesting that you have verified the identity and eligibility of the card holder and informed them of what they have consented to by accepting the ORCA LIFT card. You do not need to retain copies of any documents and you do not have to obtain card holder signatures. Print a copy of the consent form for card holders who request a copy.

By clicking the **Submit and View Summary** button, you agree to the information shown here.

King County

ORCA LIFT Card Holder Consent

Agency Confirmation:
As an Approved ORCA LIFT verfication agent I attest to the following:

Confirmed client identity/and eligibility confirmed

Customer Confirmation:

I agree to and provided the following information:

- My first/last name and date of birth
- My mailing address
- My contact information
- My income documentation -or
- I give my express permission to access my Medicaid enrollment through Provider One, or insurance enrollment through Washington HealthPlanFinder or for DSHS to disclose my enrollment status in Basic Food.

I understand that by providing the above information I was verified as eligible for King County Metro Transit's reduced ORCA LIFT fare program, and that, except as required by law, King County may use and/or retain portions of this personal information for low income fare verification purposes ONLY.

- ORCA LIFT client consent
- I also understand that my low income reduced fare ORCA card is only for my use and may not be given or sold to anyone else.

LIFT ID	Agency Name	Last Name	First Name	Consent Date
53459	King County Public Health	Covert	Jennifer	07/28/2017

Update Account:

Once a card has been issued, you can update the user's information by performing a new search for their name in the registry, clicking on their name and upon arriving at the **Lift Card Holder Registration** summary page, clicking on the **Renew/Update Account** button on the bottom of the page. You may correct and update Card Holder Information, remember to save the information.

Renew Account

People are allowed to renew their LIFT card up to 90 days in advance of the expiration date printed on the back. After the expiration date on the card, the LIFT card converts to a full-fare adult ORCA card.

- On this page you can also renew and assign a new Lift card to this user while keeping their original Lift ID number. Update and save card holder information. You do not need to re-verify identity. Add the new card number into the card information field and click the **Save New Card** button. You can now hand out the ORCA LIFT Card to the customer.
- Note: Metro will not invalidate the old card and card holders may continue to use the pass or ePurse that is on the card. The discounted fare will not apply after the expiration date and full adult fares will be charged to the card. Cardholders may transfer the value from their old cards to their new card by calling 206.553.3000 or by using their online account.

Agency Administrator Portal

Agency Administrative Users

Users with Agency Administrative privileges are able to review agency information and run reports to review activity. Note: Agency Administrators do not have administrative privileges for the Promo Account. CCSHelp will provide monthly reports for this account.

Card Activity Report

The Card Activity Report field is in the upper right hand side of the agent's screen. This summary of card activity shows the number of cards issued to the agency and the number of cards distributed by the agency since the program's inception. The count of available cards may be misleading because, at this time, we are not removing outdated cards from the Registry.

Card Activity Report

Current Inventory

Issued	:	1611
Distributed	:	1271
Available	:	340

Inventory Snapshot

Reorder Threshold	:	100
Above Threshold	:	240
Oldest Available	:	02/23/2015

ORCA Integration

Sent to ORCA	:	1270
Waiting to be Sent	:	1

Lift Administration Portal

Clicking the **Agency Admin Portal** button on the left hand side of any page will bring up this screen:

By selecting **Agency Management** and then **[info]**, you may change information and add locations.

By selecting **[cards]** you will be able to "process" Pending Card Batches, which must be done before cards are issued. The page also lists all available cards and the list can be sorted by clicking on the column header. At this time the **Mark Checked CSNs as Returned and Destroyed**, and the **Remove** check column are not being used.

LIFT Administration - Agency Management

Cards				[info]	[cards]	[users]

Pending Card Batches

Cards On Hand

> **Mark Checked CSN's as Returned**
>
> **Mark Checked CSN's as Destroyed**

Agency	Issued	CSN	Expires	Remove
Promo Account	09/13/2016	12556036	12/31/2018	☐
Promo Account	09/13/2016	12556041	12/31/2018	☐
Promo Account	09/13/2016	12556114	12/31/2018	☐
Promo Account	09/13/2016	12556169	12/31/2018	☐
Promo Account	09/13/2016	12556206	12/31/2018	☐
Promo Account	09/13/2016	12556232	12/31/2018	☐

Selecting **[Users]** provides a list of all Agency users. Inactive users will be designated by "inact" after the first name. Email CCSHelp@kingcounty.gov to add and inactivate users. The list of users can be sorted by clicking on the headers of the columns.

LIFT Administration - Agency Management

Users				[info]	[cards]	[users]

Agency	First Name	Last Name	Phone	Email
Promo Account	kcph	Tjok		sharissat@ichs.com
Promo Account	Compass	Howard		choward@compasshousingalliance.org
Promo Account	kcph	Few		jlfew@doc1.wa.gov
Promo Account	compass	Jackson		djackson@compasshousingalliance.org
Promo Account	elcentro	Hicks		orcalift@elcentrodelaraza.org
Promo Account	withinr	Quezada Miramontes		noeqm@withinreachwa.org

Reports

Select **Reports** from the Lift Administration Portal main page to generate Agency Activity, User Activity and Registry Statistics reports.

Selecting Reports from the main Agency Admin Portal lists the three types of reports that can be run for the agency. The time period for the report defaults to the last 30 days unless a different date range is entered.

LIFT Administration – Reports

Report List

- **Card Holder Data – Custom Report**

Agency Filter	: Promo Account ⌄
Document Type	: <All Document Types>
Start Date	: 07/01/2017
End Date	: 08/01/2017
Date Search Filter	: Card Issue Date ⌄

  Generate Report

- **User Activity Report**

Agency Filter	: Promo Account ⌄
Start Date	: 07/01/2017
End Date	: 08/01/2017
Report Type	: Summery Report ⌄

  Generate Report

- **Renewals Report**

Agency Filter	: Promo Account ⌄
Start Date	: 07/01/2017
End Date	: 08/01/2017

  Generate Report

The custom report using the filter of Card Added Date will list all records entered in the period by agency users. This report is useful to identify records that were created without card numbers saved. These omissions must be corrected to ensure that cards are registered to card holders so they can be replaced if lost. This filter will not include renewals because the date that the record was created will be before the specified time period.

Running the report with the filter of Card Distributed Date will list all cards issued by the agency in the specified time period. This report is used for monthly invoices.

The User Activity Report – Summary Report shows the number of records created and cards distributed by user. The numbers will be different if someone distributes a renewal card, fails to enter/save a LIFT card number, or switches between their regular agency account and the promo account before entering the card number.

- **User Activity Report**

Agency Filter	:	Promo Account ∨
Start Date	:	07/01/2017
End Date	:	07/31/2017
Report Type	:	Summery Report ∨

  Generate Report

A	B	C	D	E	F
ncyId	AgencyNai	AgencyUse	CardHolde	CardsDistributed	
36	Promo Acc	Few	1	1	
36	Promo Acc	Glenn	1	1	
36	Promo Acc	Kennedy	19	20	
36	Promo Acc	Amaya	7	7	
36	Promo Acc	Angel	4	6	
36	Promo Acc	Kalayu	1	0	
36	Promo Acc	Martinez	3	3	
36	Promo Acc	Russell	30	33	
36	Promo Acc	Palacios	3	3	
36	Promo Acc	Huh	41	50	
36	Promo Acc	Ballinger	0	1	
36	Promo Acc	Pie	1	1	

The Daily Report lists activity by day. This may be useful to see busy days and can also be seen by sorting on the custom reports.

The renewal report provides a list of renewal cards issued by the agency in the specified period.

- **Renewals Report**
  Agency Filter   :   Promo Account ✔
  Start Date   :   07/01/2017 ▦
  End Date   :   07/31/2017 ▦

  Generate Report

	A	B	C	D	E	F	G H
1	cardholder	oldcsn	renewaldate	originalagencyname	newcsn	renewalag	renewalagencyname
2	2030	11876319	7/8/2017	King County Public Health	12704795	36	Promo Account
3	2582	11888762	7/7/2017	King County Public Health	12704404	36	Promo Account
4	2824	11872458	7/25/2017	Compass Housing	12704821	36	Promo Account
5	2969	11891037	7/25/2017	King County Public Health	12704824	36	Promo Account
6	3129	11868294	7/3/2017	El Centro de la Raza	12704179	36	Promo Account
7	3599	11896881	7/11/2017	King County Public Health	12704777	36	Promo Account
8	3672	11872484	7/24/2017	Compass Housing	12704804	36	Promo Account
9	4159	11896966	7/19/2017	King County Public Health	12704960	36	Promo Account
10	4382	12811844	7/17/2017	CCS	12704953	36	Promo Account
11	4659	11896612	7/10/2017	King County Public Health	12704891	36	Promo Account
12	4703	11891130	7/3/2017	King County Public Health	12704288	36	Promo Account
13	5201	11876366	7/25/2017	King County Public Health	12704482	36	Promo Account
14	5408	11871654	7/7/2017	YWCA	12705179	36	Promo Account

Direct questions to CCSHelp@kingcounty.gov or 206-477-4553.