

# Transportation Request's Procedure

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## Overview

<b>Transportation Request Procedure, version 2.0</b>	
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<b>Document Owner:</b>	Miranda Madigan
<b>Last Review Date:</b>	1/29/2024

This Transportation Request Procedure is intended to centralize the requests from Lifeworks staff regarding all things transportation for individuals served within the Lifeworks

Transportation Department. This will give the department the visibility needed to make proper transportation choices for Lifeworks. The procedure should be implemented anytime a ride needs to be scheduled, changed, cancelled, or any other transportation related requests (Metro ID, Metro Applications, Metro Complaint's, etc.) for a person's served.

## Background

Service Requests and other requests to the Transportation Department are being replaced by "Cases" in Dynamics 365 Customer Service. You will create cases by emailing [D365-Transportation@lifeworks.org](mailto:D365-Transportation@lifeworks.org). Currently, Dynamics 365 Customer Service will replace the following:

- Opening a ticket through the Service Request System
- Emailing [transportationcancels@lifeworks.org](mailto:transportationcancels@lifeworks.org) with ride cancellations
- Emailing [transportationadministration@lifeworks.org](mailto:transportationadministration@lifeworks.org) with other transportation questions or concerns.

## Procedure Tasks

### Opening a Case with the Transportation Department:

- a) To open a case in Dynamics 365, email [D365-Transportation@lifeworks.org](mailto:D365-Transportation@lifeworks.org)  
When emailing [D365-Transportation@lifeworks.org](mailto:D365-Transportation@lifeworks.org), you may add attachments, paste a screenshot, cc a supervisor: anything they might do with any email. (It is very helpful if you say that you are including a screenshot or attachment in the body of the email.) As always, when emailing please be clear and specific about the issue or request so it can be processed efficiently and routed to the correct transportation team member.
- b) When you open a case in Dynamics 365, you will receive an email notification confirming your case has been received. You may also receive a second confirmation email once the Transportation Department further classifies the case. You then can respond to this automatic email if you need to add something to the case. Otherwise, wait for an email from the Transportation Department. You can do all their interactions on the Case through email.
- c) Types of cases that may need to be opened with the Transportation Department:
  - i. Bus Maintenance Issues
  - ii. Submitting a Metro Application
  - iii. Transportation Complaints, Concerns, or Questions
  - iv. Go-To Card Questions or Changes
  - v. Ride Requests/Changes (See below)
  - vi. Ride Cancellation (See below)

## **Ride Requests for individuals without a standing order:**

- a) For the initial case, you will send an email to [D365-Transportation@lifeworks.org](mailto:D365-Transportation@lifeworks.org) with a Transportation Request Form attached.
  - a. A new Transportation Request form will not need to be filled out again, unless the following scenarios apply:
    - i. Any information on the original Transportation Request Form has changed (ex. Address, ride times, workdays, etc.)
    - ii. No new case has been opened in the past 30 days
    - iii. If requested by the Transportation Department

### **b) For individuals with a flexing schedule:**

- a. Every week, by end of day Thursday, send an email to [D365-Transportation@lifeworks.org](mailto:D365-Transportation@lifeworks.org) with the individual's schedule for the following week.

- b. It would be helpful if you included the individual's full name in the subject of your email so we can find the request more easily in the D365 System.
- c) For individuals with a consistent schedule, but with no standing order:**
  - a. Every Monday, send an email to [D365-Transportation@lifeworks.org](mailto:D365-Transportation@lifeworks.org) requesting ride times for the individual.
  - b. It would be helpful if you included the individual's full name in the subject of your email so we can find the request more easily in the D365 System.
- d) Upon receipt of the case, The Transportation Department will:
  - a. Assign the case to the appropriate transportation team member
  - b. Schedule the ride
  - c. Respond with ride times within the case created.
- e) You will then receive an email with the ride times.

## Ride Cancellation Requests

- a) A minimum of 2 business days prior to an individual's ride needing to be cancelled you will create a case by emailing [D365-Transportation@lifeworks.org](mailto:D365-Transportation@lifeworks.org) with the individual's full name and day/s needing to be cancelled.
- b) Any ride cancellations that are needed inside of the "2 business day" window will need to be cancelled by you.
  - a. Example: John Doe is sick and needs his ride cancelled for the next day. You will need to cancel the individual ride with the respective provider. (If you have any questions regarding provider information, please open a new case with the transportation department).
- c) Upon receipt of the case, The Transportation Department will:
  - a. Assign the case to the appropriate transportation team member
  - b. Cancel the ride
  - c. Respond within the case once the ride has been cancelled.
- d) You will receive an email with the ride times.

## Urgent Situations

If there is an urgent situation with the person served regarding transportation call Miranda Madigan, or Erica Carlson directly.

- a) Here are some common examples:
  - i. Person Served is at the wrong location.
  - ii. The person Served bus has not shown up.
  - iii. Person Served needs a last-minute ride adjustment.
- b) Contact Information:
  - i. Miranda Madigan: 612-703-2124
  - ii. Erica Carlson: 612-772-1732

If there is an urgent situation regarding a Lifeworks Vehicle, Call Bob Platz directly.

- a) Contact Information:
  - i. Bob Platz: 651-208-5577

## Related Documents

- Transportation Request Form

## Version History

Version	Minor Version Date	Major Version Approver and Date	Author	Reason/Comments
1	1/10/2023		Miranda Madigan	
2	1/17/2023		Miranda Madigan	
3	1/19/2023		Miranda Madigan	
4	1/22/2023		Miranda Madigan	
5	1/29/2024		Miranda Madigan	Revised
6	8/20/2024		Miranda Madigan	Revised