

Live Chat Toolkit

June 2019

Developed by:
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This toolkit is based on results of the Judicial Council's Live Chat pilot project, which took place between October 2018 and March 2019. This toolkit has not been reviewed or approved by the Judicial Council but is made available as a best practices document to organizations interested in pursuing local Live Chat projects.

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Live Chat Toolkit

Section 1

Development & Implementation Manual

Live Chat Development and Implementation Manual for Self-Help Legal Centers

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Live Chat Development and Implementation Manual

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I. Introduction

Getting Started with Live Chat

Congratulations! You are about to embark on developing a service that will bring tremendous value to your existing customer base and will put you into contact with new customers. Live Chat allows you to answer questions quickly without requiring customers to come to you, and your encounters with chatters will provide you valuable data to improve, expand and better target your services.

This Development and Implementation Manual is designed to guide you through a step-by-step process for bringing a Live Chat service to your agency. The Manual covers the entire process, from planning, to contracting to training your frontline Live Chat agents, and provides easy to customize resources such as a sample project plan, agent agreement, and contract with a Live Chat software vendor.

This manual was developed after the conclusion of a Live Chat Pilot Project implemented by the Judicial Council of California. The pilot was hosted on the California Courts' Self-Help Website and was designed to assist users with questions about Name Change cases.

Roadmap and Timeline for Live Chat Development and Implementation

Developing and implementing a Live Chat service for your local county requires five major activities:

- 1) Planning
- 2) Contracting for and implementing Live Chat software
- 3) Developing content and policies
- 4) Recruiting and training chat agents and testing
- 5) Developing a plan for data collection

The following table provides an expanded description of these five steps and an estimated amount of time required for each. The table also indicates the lead staff involved at each phase. A list of responsibilities corresponding to these team members is described in further detail in the next section.

Activity	Discrete Tasks	Staff Involved¹	Estimated Time
Planning	<ul style="list-style-type: none"> • Develop project plan and budget • Possibly develop a project charter • Identify team members • Identify subject matter for chat • Obtain project approval 	Managing Attorney and Project Manager, with support from Subject Matter Experts	1 month
Purchase and Implement Live Chat Software	<ul style="list-style-type: none"> • Determine whether an RFP is required; if so, develop and issue RFP • Identify Live Chat software vendor • Develop and negotiate contract • Learn to use Live Chat software • Develop training for Live Chat Agents 	Project Manager Technology Lead	1-3 months, depending on whether a bidding process is required
Content Development	<ul style="list-style-type: none"> • Determine parameters of content that will be provided • Draft, review and revise scripted answers • Develop initial language for greeting Live Chat customers • Develop and implement training for Live Chat Agents • Establish process for continual feedback and improvement 	Subject Matter Experts	1-3 months, depending on the scope of the area of law
Policy Development	Develop policies and procedures for: <ul style="list-style-type: none"> • Escalating questions and complaints • Emergencies • Ensuring quality and continuous feedback and improvement 	Project Manager	
Recruit and Train Chat Agents and Test	<ul style="list-style-type: none"> • Determine whether Chat Agents will be employees or volunteers, attorneys or non-attorneys • Recruit • Train • Test on staging site 	Project Manager, Technology Lead, Subject Matter Experts	1 month
Develop Data Collection Process	<ul style="list-style-type: none"> • Identify data points for collection during chat sessions and create data collection template • Determine how chatter privacy will be protected • Train Chat Agents to collect data 	Project Manager, Subject Matter Experts	1 month

¹ Managing Attorney approval obtained at key milestones for each Activity.

II. Planning

The planning phase for your Live Chat service includes the development of the project plan, formation of the Live Chat team, and identification of an area of law or process for Live Chat assistance. The project plan will act as a guide for all team members, and may include goals, assumptions, and a timeline. A sample project plan is included as Appendix A.

Recommended Team Members

A successful Live Chat project will include the following Team Members:

- Managing Attorney (1)
- Project Manager (1)
- Technology Lead (1)
- Subject Matter Expert (1+)
- Live Chat Agent(s) (1+)

Depending on the size of your agency and the size of your budget, some roles may be filled by the same team member.

Managing Attorney

- Approve the area of law in which assistance will be provided and associated legal content
- Approve program policies
- Approve project expenses and contracts

Project Manager

The principal responsibilities of the Project Manager are to:

- Manage the contract for the Live Chat software
- Recruit and train staff or contractors
- Develop and recommend policies for approval
- Establish and manage the project budget
- Develop and execute the project plan
- Recommend areas of law in which assistance will be provided
- Oversee development of standard chat content
- Work with Technology Lead to deploy the chat widget, set up user accounts, and configure other aspects of the application.
- Manage training programs for Live Chat Agents
- Generally manage and coordinate the work of all team members

Technology Lead

The principal responsibilities of the Technology Lead are to:

- Provide technological expertise to the Project Manager when negotiating and implementing the Live Chat software contract
- Learn the Live Chat software
- Provide IT project support

- Develop and implement training on use of the Live Chat software for Chat Agents

Subject Matter Expert

Once the area of law that will be the focus of the Live Chat service has been agreed upon, one or more attorney subject matter experts should be identified to work on the following aspects of the Live Chat project:

- Participate in decision-making about areas of law in which assistance will be provided.
- Develop “scripted answers” with legally accurate information on their corresponding area of law
- Draft web page content that explains the service and provides appropriate disclaimers.
- Research and recommend privacy policies and handling of personally identifiable information.
- May advise on developing content to handle emergency and safety-related situations.
- Consult with outside experts on areas of intersection, such as Domestic Violence prevention, procedures handled by executive agencies and any legislative proposals in progress
- Adapt model policies for Live Chat and develop any additional recommended policies
- Assist in developing training on the delivery of standardized content through the Live Chat interface for Chat Agents
- Review chat transcripts and provide ongoing feedback to Chat Agents on the success of chats, and advise on the need for additional or modified scripted answers
- Be available during chat hours for consultations, on an as-needed basis and/or serve as a back-up Chat Agent

Live Chat Agents

Depending on the breadth and scope of your project, you may elect to recruit and train any number of chat agents. Chat Agents may be attorneys or non-attorneys who receive training in the subject area². They may be volunteers or staff. In addition, Chat Agents are responsible for the following tasks:

- Participate in regular debriefing meetings
- Serve as Live Chat Agent
- Code chats per the data collection plan
- Amend and update scripted answers as needed

² The Judicial Council’s Live Chat for Name Change project employed an attorney as a chat agent. This chat agent/attorney collaborated and consulted with two other attorneys in the agency who are subject matter experts in name changes. Other Live Chat models rely on paralegals, law students and other non-attorneys to be agents, which is accounted for in training, preparation, supervision and support.

Identification of an Area of Law or Legal Process

The most critical decision in the process of setting up a Live Chat service is determining the area of law or legal process that will be addressed through Chat. The subject matter of Live Chat will determine the scope of information provided and will affect the number of subject matter experts and live chat agents required and the time required to develop content. Some important considerations when making this determination include:

- Ensure that you have access to subject matter experts for the area of law selected. Consider areas in which there is already a significant amount of content, for example on websites, FAQs, or other written materials that can be converted into Live Chat scripted answers.
- A more discrete process will result in less content overall. For example, if you limit the Live Chat inquiries to questions about how to answer a Governmental Child Support Complaint and Summons, this will require less content than a more general “Child Support” Live Chat service. Either of these would require less content than a Live Chat service for “Family Law.”
- Consider ancillary products available for the area of law or process selected. For example, it might be helpful to the public to offer Live Chat assistance with the completion of a fillable form or the use of a document assembly program.
- Consider local service gaps; it may be especially helpful to provide Live Chat assistance in areas of law in which there is not a workshop or 1:1 assistance available.
- Consider other areas of law that overlap or intersect significantly with the subject area you are considering. For example, many people who seek out a name change also seek out recognition of a gender change. It is important to determine ahead of time the parameters you will draw around the area of law and the types of questions that will and will not be answered through the Live Chat service.

III. Purchase and Implement Live Chat Software

Live Chat applications are generally provided as SaaS applications (Software as a Service) that can be subscribed to on a monthly or annual basis. Typically, there are different modules available, so it is important to determine the components that will be needed for the project. The cost per agent is generally modest, making this type of application possible to deploy for under \$5,000 for a small team of two to four people. Information Technology support is fairly minimal and involves customization of the widget (if beyond what non-IT staff can do), embedding code to make the widget available, and trouble-shooting problems for the team.

Identify a Live Chat Software Vendor

The Live Chat software you choose will shape the flow and functionality of your service. Most vendors offer web-based software, meaning that agents and administrators can access the software using any web browser and an internet connection, without needing to install software. Most also offer pricing based on the number of “seats” your agents may use, or how many agents may be online at the same time. Some important considerations when choosing a software vendor include:

- Cost per seat/license, and whether an administrator or technology expert must occupy an agent seat to log in and view chats
- Training materials or services offered by the vendor, if any
- Overall ability to customize the program, including user and agent interfaces, changing standard introductory language, options for handling offline hours, and widget appearance, etc.
- Capacity for automatic language detection and translation
- Agents’ ability to chat online with other agents, transfer users to other agents, and to flag chats for follow-up
- Whether the vendor offers other related services you may want to use in the future, such as automated responses when agents are offline
- Analytics and evaluative reporting features
- Customer service

Create a Purchase Order

Working with Procurement, specify the modules that are needed for the project and the number of agent seats required for the purchase order.

Live Chat Application Implementation

Since live chat applications typically aren’t going to require any type of software download. Rather, you will probably need to purchase a license for your IT staff so that they can launch the application on your website when you’re ready. They can also make the application available on a staging page while the team configures hours of operation, the look and feel of the widget, agent accounts, etc. Most of this can probably be done by the Live Chat team, with IT needed only for functions that may require programming. For example, the Name Change Live Chat Team wanted the widget to behave a certain way for return visitors, which required IT staff to write a program.

IV. Content Development

The development of content will include drafting scripted answers, drafting language to announce the availability of the service and drafting initial “start-up” language and disclaimers, used when a Chatter first enters the chat. Depending on the features and functionality of the Live Chat software, there may be other categories of content that can be developed. For example, some Live Chat vendors offer a “storefront” approach for Live Chat, that can include informational articles and other content.

The minimum required content includes the following, with samples:

Scripted Answers

Scripted answers are the backbone of a Live Chat operation. The table below provides a sampling of typical questions and scripted answers for Name Change.

Question/Type of Information	Scripted Answer
How much will it cost to change my name?	Right now, it costs \$435 to file a new case with the court. In most cases, you will also need to publish information about your case in a newspaper, and those costs may range from \$50 to \$500 depending on which newspaper you choose.
Fee Waiver	If you can't afford the court filing fee, you can ask the Court to allow you to file a case at no cost or reduced cost. See http://www.courts.ca.gov/selfhelp-feewaiver.htm for more information and to get the court forms to ask for a fee waiver. The court filing fee (or a fee waiver, if you have one) does not cover the cost of publishing in a newspaper, which you will have to pay directly to the newspaper.
Publication	The law requires that, in most cases, people who want to legally change their name must publish a legal notice in a court-approved newspaper. This must be done at least once per week for four weeks in a row. Some exceptions to this include a name change to match gender identity and some domestic violence situations.

Anticipating the types of questions that will be asked through Live Chat will allow you to create a substantial set of scripted answers before you go live. One way to anticipate the types of questions that will be asked is to look at existing content on the web about your particular area of law. You can also consult local court websites for informational content. Important data points for any process will include the basics: locations, addresses, filing fees, specific procedures and forms. Information about statewide forms available or required for a particular process can be found on the [California Courts](#) website. Many sections of self-help content available on this site also contain a section titled “Frequently Asked Questions.” This is also a gold mine of questions for Live Chat.

Introductory Language

When a Chatter engages with the chat service, it is important to set the parameters of the conversation early and provide any disclaimers or necessary information about the nature of the chat. Some examples of standard introductory language are:

- This chat button will connect you with a live person from the Online Self-Help Center. The agent is not your attorney and cannot give you advice. Any information you share with the agent during your chat is not confidential. If you agree to the above and want to start chatting, please enter only your FIRST name, and a short description of your issue.
- An agent will be right with you. While you wait, here is some information that may be helpful during your chat session. Clicking on the up arrow in the upper right corner of your chat box allows you to make the chat box larger. You will be able to get an email copy of your chat session by clicking on the word "Options" in the lower left corner of your chat box.
- Let me see if I can help to answer your question. Before I do, I need to tell you about how I can and cannot help. I am not your attorney and cannot give you legal advice or tell you what you should do about your legal problem. The court cannot provide you with an attorney, and nothing you tell me is confidential. To protect your information, please do not share any personal or case specific information, like names, phone numbers, or case numbers. Is all of that okay with you?

Website Language

Wherever the Live Chat link is placed on your website, it is important to provide certain standard information:

- Hours of operation
- Subject matter of Live Chat
- Information about how to use the Live Chat service
- Information on level of confidentiality afforded by the Live Chat service
- For links available on pages with violence prevention content and for Live Chat services specifically for Domestic Violence, Civil Harassment, Gun Violence, or Elder/Dependent Adult Abuse:
 - Warning to call "911" in case of emergency or immediate danger
 - Information about protecting privacy online

V. Policy Development

Privacy Policy

As with any digital interface, privacy is a key concern for your Live Chat program. You should ensure that your program has a privacy policy in place, and that protocols designed to protect the privacy of your users are used throughout the program. These protocols should address how much personal information is collected from users, how chat data will be stored and for how long, if and how personally identifying information will be removed from the chat data, and how the data will be shared.

Any data that is exported from the chat application, for example chat transcripts, needs to be redacted if it contains personally identifiable information and is being shared outside the immediate project team.

To view the California Courts' privacy disclosures, please see the California Courts Privacy Statement at <http://www.courts.ca.gov/11530.htm?rdeLocaleAttr=en> as well as the Terms of Use, which covers linking and third parties at <http://www.courts.ca.gov/11529.htm>.

Policies

The Project Manager should develop policies and procedures for the following key activities:

- Escalating questions and complaints
- Handling an emergency or questions regarding violence prevention
- Ensuring quality and ongoing improvement of standard language

Escalation of Questions and Complaints

Questions

While many questions posed in chat conversations are fairly easy to anticipate and you will have scripted answers developed before launch to appropriately address them, unanticipated questions do arise. In those cases, it is important for agents to be able to reach out to a subject matter expert for assistance. The ability of subject matter experts to provide on-demand assistance depends on your particular configuration of team members and how much time they are able to dedicate to the project. Some suggested approaches include:

1. If possible, ensure that a Subject Matter Expert is available by phone or email during chat hours to address concerns.
2. Create a list of additional internal resources whom Live Chat Agents can call upon for procedural questions, including a liaison in the clerk's office and staff who can answer questions about online records access.

3. Create a list of external resources you might have that your agents can consult and/or that can serve as referrals for more complicated issues. An example of this would be a legal services nonprofit agency specializing in a particular area of law.
4. Consider whether you want Live Chat Agents and/or Subject Matter Experts to communicate with chatters via email outside of the chat structure. If you are comfortable with this, you can move more complicated discussions outside of chat and respond when there has been time to consult with experts or conduct additional research to make an appropriate response.

Complaints

While most chatters are thrilled with the ability to use chat to quickly get their questions answered, occasionally there are complaints or issues that arise. Sometimes, chatters have a hard time communicating in writing or they are unsure themselves about the information they are seeking. Other times, they are asking for legal advice and Live Chat Agents are unable to provide it. This can lead to frustration and sometimes anger directed at the Live Chat Agent. In many cases, a frustrated chatter will simply leave the chat, but Live Chat Agents should be prepared and trained to handle hostile chatters.

Live Chat Agents should be trained on the following procedures for handling difficult situations within chat:

1. If a chatter becomes hostile, try to remain calm and provide neutral, informative responses.
2. Although there will be times when you have to tell a chatter that you *cannot* answer their questions, it is important to focus on what you *can* provide them. The following are examples:
 - I'm sorry, I was not able to find the information you are looking for. Can I help direct you to your local Self-Help Center? Though they cannot give you legal advice, you may be able to speak with someone to get more information about your problem.
 - As you read prior to the beginning of our session, I am only able to provide information about the name change process. So, I can tell you *how* to do something, but not what is the best thing to do for you. If you need advice about what you should do with a legal case, you may contact an attorney. Would you like to continue with our session, or would you like me to give you links to help you find an attorney who can give you advice specific to your case?
3. If a chatter uses obscene, inappropriate, or threatening language, you have the right to leave the chat.

4. If the chatter asks to lodge a formal complaint, ask for their email address and let them know that a manager will follow up with them.
5. Sometimes, it helps to share your experiences with other team members. You should feel free to bring these situations to your team meetings for discussion with the group. You may get feedback to help you in the future and you may help others to learn how to handle challenging chatters.

A sample Live Chat Escalation Protocol is in Appendix C.

A designated Subject Matter Expert should conduct regular review of Live Chat transcripts (this process is described in greater detail in the Quality Assurance section below) and should inform the Project Manager of any chat exchange that seems problematic, including customer complaints that are not handled correctly. In addition, any issues that are detected in a review of customer feedback should be addressed. The purpose of identifying these issues is to train and coach Live Chat Agents on remaining calm and offering neutral, informative content, even in the face of hostility.

Emergency and Safety Protocol:

Regardless of the subject area of your Live Chat service, there is a possibility that a chatter will be experiencing domestic violence or will be in immediate physical danger of some kind. A chatter may also have questions about the intersection of violence prevention issues and a particular court process; for example, a victim of domestic violence who would like to pursue a confidential name change.

The goals of the Live Chat program in these situations are to:

- Make sure that immediate and emergent issues are addressed appropriately.
- Provide information to victims of violence about how to protect their personal information while online (“Safe Surfing³”).
- Provide accurate information about legal options available to chatters who are victims of violence.

These goals can be achieved with: 1) the development and implementation of standard warnings on your website and within the Live Chat interface, 2) the development of scripted answers to ensure safety and provide correct information about options for violence prevention, and training agents on their use; and 3) the identification of a team member to track any changes in the legal options as they relate to the content provided through Chat.

1) Implement Standard Disclaimers and Warnings

Any person who is in immediate danger should call 911. This is a standard warning used by many online services. In addition, many websites provide information and warnings regarding the importance of protecting privacy on the internet.

³ See, “Using the Internet More Safely,” available at: <https://www.domesticshelters.org/safe-surfing>.

The California Courts website uses the following standard language on their web pages that provide information about domestic violence:

Are You in Danger Now? If you need help right now, call “911.”

You can also call:

- Your local [Domestic Violence Shelter](#), or
- The [National Domestic Violence Hotline](#):

1-800-799-7233
TDD: 1-800-787-3224

There are slightly different warnings for each area, including Civil Harassment and Elder/Dependent Adult Abuse, which contain customized resources. The California Courts website also uses the following language regarding internet privacy:

WARNING:

Please note that websites you visit may be viewed by someone else later. Always clear your browsing history after searching the web. Consider using a public or friend’s computer if you are concerned about someone viewing your browsing history.

The Domestic Violence Hotline uses the following language:

Safety Alert: Computer use can be monitored and is impossible to completely clear. If you are afraid your internet usage might be monitored, call the National Domestic Violence Hotline at 1-800-799-7233 or TTY 1-800-787-3224. Users of web browser Microsoft Edge will be redirected to Google when clicking the “X” or “Escape” button.



Boilerplate language like the above should be placed on your organization’s website on pages that address issues of violence prevention. If you are offering a Live Chat service to answer questions about domestic violence, civil harassment, or another category of

violence prevention addressed in the California Courts, these warnings should appear on the webpage that houses your Live Chat link.

2) Develop scripted answers and train agents on their use

In the process of developing scripted answers for your Live Chat program, be sure to include standard responses for those situations in which a chatter indicates that there may be an issue of violence in their lives.

Example 1: Establishing Safety

Here is an example of a chat conversation where the agent used a scripted answer to establish whether the chatter was safe:

CHATTER: I'm a victim of sexual assault so I want to change my last name

AGENT: *Are you safe? Do you need information about getting a restraining order or other legal help?*

CHATTER: Yes I am safe and yes I will need other info on legal help

AGENT: *I'm glad you are safe now. I'll do my best to answer any questions you have about Name Change or other legal help.*

Example 2: When the person is not safe

In this next example, the chatter does not give assurances that they are actually safe. It is important to point a chatter in this situation to emergency resources:

CHATTER: I'm a victim of sexual assault so I want to change my last name

AGENT: *Are you safe? Do you need information about getting a restraining order or other legal help?*

CHATTER: I don't know. I'm really scared.

AGENT: *If you are in immediate danger, please call 911 right now. I cannot help you through Chat with an emergency situation, but I want you to be safe. I will stay on the Chat with you until emergency assistance arrives.*

Finally, there are many areas of law that intersect with violence prevention, such as confidential processes for victims of domestic violence and special custody laws in situations of domestic violence. If the area of law that you choose for your Live Chat program has special processes or provisions for victims of violence, it is important to try to anticipate those questions and develop scripted answers for them.

The following are examples of scripted answers regarding domestic violence in name change:

- ❖ *If you or your child(ren) are a victim of domestic violence or sexual assault or are in the State Witness Program, you should talk to someone at your local Self-Help Center or an attorney about service requirements for your case.*

- ❖ *If you decide to start a new Name Change case, you may be able to skip the publication portion of the case if you are concerned he or she will find you.*
- ❖ *Some additional information that may be helpful: If you have a confidential address through the Safe At Home program to avoid domestic violence, if you or your child are a victim of sexual assault, or if you are in the State Witness Program, you may ask that the court keep your address confidential and that you not have to publish your name change request in a newspaper. More information is available in the court's information sheet NC-400-INFO, available at <http://www.courts.ca.gov/documents/nc400info.pdf>*
- ❖ *If you don't have a confidential address through Safe at Home but you want one, you can call 1-877-322-5227 or visit www.sos.ca.gov/safeathome*

It is important for your quality assurance process to encourage Live Chat Agents to report to the team when there are repeated questions arising in chat for which there are not scripted answers. This will allow the Subject Matter Experts to develop more scripted answers that better meet the needs of the chat agents and the public.

A sample Emergency and Safety Protocol for Live Chat Agents with examples of scripted answers is included in Appendix D.

3) Assign a team member to follow legislative and rule proposals

As a final strategy for ensuring that accurate information is conveyed to chatters, it is important to assign a team member, usually a Subject Matter Expert, to track changes in the law and procedures related to domestic violence and other areas of violence prevention under California law. These areas of law tend to attract regular attention from the Legislature and therefore, codes, rules, and forms change regularly.

The point person assigned to make sure that scripted answers are up-to-date can also be responsive to Live Chat Agent feedback indicating the need for additional content.

Quality Assurance and Ongoing Improvement

A successful Live Chat project will include a process for quality assurance and ongoing improvement. The quality assurance process is critical at the outset of the project to ensure that scripted answers and standard language are legally accurate, responsive to chatter questions, drafted in clear, easy to understand language, and strictly informational, without providing advice. The team should perform regular monitoring of chat transcripts to spot the need for additional scripted answers or revisions to existing answers. Finally, the Live Chat Team should meet regularly to share experiences, provide coaching and support to Live Chat Agents, and receive feedback from agents to improve the overall service. Each of these elements of quality assurance is discussed below.

Quality Assurance: Development Phase

During the development phase, Subject Matter Experts and Chat Agents will work to develop scripted answers to anticipated questions. These scripted answers should be reviewed by at least one other subject matter expert for legal accuracy and to ensure they are not providing legal advice. They also should be written in plain language and reviewed by a colleague or team member with plain language drafting and editing skills. Any suggestions made to alter the text based on plain language or readability should be reviewed by a Subject Matter Expert to ensure that the legal accuracy of the information has not been affected by the change.

Quality Control: Review of Chat Transcripts

During the life of the project, both the Project Manager and Subject Matter Experts should conduct a review of chat transcripts. This may be a careful review at the beginning of the project, or a more focused review of a new chat agent at the beginning of their tenure and can become more of a “spot check” over time.

If your chosen software does not provide a searchable record of transcripts of each individual chat session, a good process is to require Chat Agents to save and submit a full transcript of each session upon closing, as part of the data collection and documentation process. The transcript can be saved in Microsoft Word, which will allow it to be searched. As Subject Matter Experts spot any issues or areas for improvement, they can communicate feedback on chat performance to the Live Chat Agents and can develop or revise scripted answers as needed.

Ongoing Improvement: Regular Team Meetings

We recommend that the Live Chat Team have regular check-in meetings that include all team members. You may want to consider a meeting every two weeks during the initial phases of your project and then reduce meetings to once a month. The purpose of the meetings will be to:

1. Reinforce policies and procedures
2. Discuss necessary changes to content or the need for additional content
3. Discuss any necessary changes to messaging around Live Chat on the website or within the Live Chat software interface
4. Share experiences during live chat and learn from each other
5. Communicate about changes in the law

VI. Recruit and Train Chat Agents

Determine How You Will Staff Your Program and Recruit Agents

Before launching your Live Chat program, your team will need to make some key decisions regarding staffing. These include:

- Whether your Chat Agents will be non-attorneys, attorneys, or a combination thereof
- Whether you will staff the program with employees, contractors, and/or volunteers
- Whether your Chat Agents will need be physically present at your site while online, or whether they may log in remotely for their shift(s)
- The days and hours you will operate your Live Chat program
- How and when Chat Agents will communicate with Subject Matter Experts or an administrator if questions or emergencies arise

Attorneys and Non-Attorneys

This Toolkit is based on a pilot that used one attorney as the Chat Agent. With appropriate attorney oversight, you could consider non-attorney Chat Agents as well. Deciding whether your Chat Agents will be attorneys or non-attorneys will impact the cost of the program and your ability to recruit contractors or volunteers. Attorneys, particularly those with experience or expertise in the chosen area of law, may need less support or training from a Subject Matter Expert, but may have more limited availability or significantly increase the cost of your program. Non-attorneys - including paralegals, undergraduate or graduate students, and other court employees or volunteers - may need more training or support but have more availability.

If you are using web-based Live Chat software, you will have the option of allowing Chat Agents to log in remotely from any location with a computer and high-speed internet connection, allowing you increased access to off-site volunteers or contractors.

Hours of Operation

Reviewing website analytics and conducting a survey prior to choosing your hours of operation and/or staffing arrangement may help to paint a picture of how users will interact with a Live Chat program on your website.

Your website's analytics can offer valuable information about how many visitors visit specific pages. You can also look at peak usage times and days for the site. In addition, offering a survey on your website for a limited time (such as a Google Form or SurveyMonkey) or a survey to be distributed at your local self-help center(s) could help you gather information about the days and times users would most likely access Live Chat.

The Name Change pilot ran a survey on the California Courts website for a few weeks asking visitors about whether they would use live chat and at what times of day. Over 100 responses were received indicating high interest in the service.

Though you may choose to schedule Chat Agents for shifts of any length, three-hour shifts are used by many Live Chat programs. You will also want to determine how Chat Agents should handle users at the end of a shift (i.e. if they will hand off a user to a new Chat Agent, or if they will complete any chats they handle) and when they will record data in your data collection tool, if at all.

Train Chat Agents

Content Training

Chat Agents will need to have substantive legal training for the area of law you plan to offer Live Chat services. In addition, Chat Agents should gain familiarity with the following:

- Scripted answers: though these should be programmed into your Chat software, Chat Agents should be familiar with the content and how to access the content during a Chat
- Court forms and where to find them
- Specifics about your county and courthouse(s), including accessibility information, hours of operation, forms of payment accepted, relevant room numbers, etc.

It will be important for all agents to understand and agree that they will be providing legal information only. They should read and familiarize themselves with your court's self-help guidelines. A copy of California's guidelines are available at https://www.courts.ca.gov/partners/documents/self_help_center_guidelines.pdf.

Software Training

For training purposes, it will be helpful to have the Chat program accessible only on a staging site at first, allowing trainees to practice chatting with volunteers before going live on your public website. Training for agents should cover critical functionality of the system, such as how to transfer a chat, how to chat with another agent, how to search chat histories, etc. Training for Subject Matter Experts should address how to add and edit content and how to chat with an agent while they are online.

How to use scripted answers

Once you have developed scripted answers for the most common questions you anticipate from users, those scripted answers can be programmed in to your account using shortcuts. Shortcuts should be short and easy to remember and can be used for introductory or conversational language as well as content. The exact format of your shortcut will be determined by the software you choose. When a Chat Agent begins typing in a shortcut, it will auto-generate the entire scripted answer, saving time and

ensuring consistency across agents. The table below provides a sampling of shortcuts and scripted answers for introductory or conversational language.

Shortcut	Scripted Answer
/case type	What kind of case do you have questions about?
/wait	Please hold while I look for that information.
/goodbye	Before you leave, I wanted to remind you that any information you provided during this Live Chat session is not confidential. Any information offered by your Live Chat agent should not be considered legal advice. If you would like a copy of this chat session emailed to you, please click on the word "Options" in the lower left corner of your chat box. We hope you will help us improve our services by choosing a 'thumbs up' or 'thumbs down' rating (you can also add optional comments). Thank you for using Live Chat!

Handling simultaneous chats

One of the many benefits of a Live Chat service is the Chat Agent's ability to chat with more than one user at a time. Though this may seem daunting at first, as agents become more comfortable with the content and the software, it will become second nature. A team member with administrative rights may set parameters for each Chat Agent, including a maximum number of chats (we recommend three to five chats as a maximum for one chat agent). An administrator may also set up notifications (a particular sound when a user requests or leaves a chat, for example) and configure how chats are initiated or terminated. Allow trainees to practice handling chats with each other on a test site, particularly if an administrator can simultaneously be logged in and observing, can assist all parties in becoming more familiar with the software and how to maintain multiple chats with scripted answers.

Chat Agent Guidelines

Your training for Chat Agents should include a discussion and written summary of the guidelines and procedures you would like them to follow. Below are some topics you may want to highlight.

Initiating an interaction

Your Chat software should allow you to see how many visitors you have on your web page(s) at any given time, and to initiate a chat (either automatically or at your Chat Agent's direction) if you choose. If you have a limited number of agents or your preference is to wait for customers to initiate the chat, you may choose to have Chat Agents not initiate chats at all, and only respond when users request a chat. The name change pilot did not reach out to customers and instead waited for them to initiate the chat.

Protocol for off-script answers

Users may ask questions for which a scripted answer has not been developed. Your Chat Agents should understand the procedures to follow for off-script answers, which may include multiple options, such as:

- Transferring the user to another Chat Agent within the program
- Contacting the Subject Matter Expert or an administrator to find the answer
- Searching for the answer on reliable websites or seeking the answer by phone while the chatter is on hold
- Maintaining a professional, friendly, and/or empathetic tone
- Recording the off-script question and answer for review and future scripting

Closing out a chat

Chat Agents should be trained on protocols on how to end a chat, including any feedback you would like to request, and any data points the Chat Agent should collect and enter into your data collection tool, if you would like to collect data beyond what your software's analytics allow. This topic is discussed in more detail in the Data Collection section.

Special scenarios

Chat Agents should be trained on how to respond to users who are upset or angry, as well as those who are in immediate danger or are experiencing an emergency. More information about these scenarios is detailed in the Policy Development section, and in Appendices C and D.

Regardless of whether your Chat Agents will be attorneys or non-attorneys, it will be important for all agents to understand and agree that they will be providing legal information only. They should read and familiarize themselves with your court's self-help guidelines. A copy of California's guidelines are available at https://www.courts.ca.gov/partners/documents/self_help_center_guidelines.pdf

A sample Live Chat Agent Agreement, to be completed after training, is attached as Appendix B.

VII. Testing

It's important to have a testing phase prior to launching the service by displaying the widget on a staging page of your website. You can recruit testers from your court. It can be helpful if they are unfamiliar with the subject area so that their user experience would be similar to a real customer. Some areas to include in testing include the following:

- Does the application work as expected? Try scenarios with the user on a mobile device, is a repeat visitor, requests a transcript, etc. Try to test as many application features as possible.
- Test your scripted answers. Do they work well? Do they require modification during the chat? Do you have gaps in your collection of scripted answers?
- How do agents handle difficult customers? Do the protocols you have established work well?

VIII. Develop Data Collection Process

Data Collection

The data you and your Chat Agents collect, if any, may help you better understand who your users are and what information they are looking for. Data collection can be time-consuming and onerous, so your data collection tool should be carefully crafted to help your Chat Agents quickly and easily collect the information you want. Your Live Chat software may have analytics features that can generate reports as needed or be programmed to do so. For example, your application analytics may include the following item:

- Whether they access Live Chat via a desktop or mobile device
- Information about the Chat Agent's experience, such as how many chats were handled in one shift or at one time
- Information about the chat itself, including the length of the chat, number of messages exchanged, time of day and day of the week, and agent handling the chat
- Chat ratings
- The number of missed or dropped chats

To supplement your application analytics, you may want to collect and analyze data such as:

- General information about users, such as what courthouse they will file in
- Whether they are inquiring about a case for themselves or someone else
- Information about the user's legal issue(s)

User Feedback

Most live chat applications will have an easy way for customers to evaluate their chat. The application used for the name change live chat pilot had a “thumbs up,” “thumbs down” system with the option to add a comment.

You may want to use a third-party survey tool, such as Google Form or Survey Monkey to gather customer feedback. You can request that customers participate in the last chat by explaining the survey and providing a link. A copy of the name change live chat customer survey is in Appendix E.

Information about the user’s experience with Live Chat, which can be tracked in the chat using a rating scale or comments, or outside the chat via a link to a SurveyMonkey, Qualtrics survey, or other data collection tool.

Using Data to Improve Service Delivery

The information gleaned from data collection may help you provide more targeted services to users and create or modify resources to better direct users to the information they need assistance with. This may include adding or changing information on your website pages, creating or modifying informational sheets, providing additional staff or volunteer trainings, or proposing changes to court forms or processes.

Regular and consistent review and analysis of collected data can help to inform the services you offer, both through Live Chat and in-person services provided at the court or self-help center.

Appendix A: Sample Live Chat Project Plan

PROJECT NAME: Live Chat

DATE: _____

SUMMARY AND SCOPE OF PROJECT

Include a brief summary of the project here. What is the scope of the project? Who will be staffing the project?

Project Goals and Objectives

Include your project goals and objectives here. Sample goals might include:

- Develop and refine written content and standard protocols for the Live Chat program
- Initiate and implement the Live Chat program
- Collect program usage and evaluation data
- Report findings and recommendations

Statement of Work

List anticipated work here. For example, this effort might include the following:

- Project planning
- Content development
- Pre-launch logistics
- Software programming and training
- Content approval and translation
- Beta testing
- Live Chat Implementation
- Evaluation and Adjustments
- Assessment and Review; Reporting

Specify work that will not be included in this project. For example, this effort might not include the following:

- Marketing
- Development of a volunteer program

Constraints

List limitations and constraints that have been identified for this project. For example:

- Are there limitations on providing Live Chat in other languages?
- Are there limitations on hours of operation or services provided?

Assumptions

List assumptions were made when developing this Project Plan.

PROJECT TEAM

The Project Team includes the following individuals:

1. Project Manager:
2. Technology Lead:
3. Subject Matter Expert:
4. Live Chat Agent(s):

PROJECT DOCUMENTATION

How will you collect and store data?

COMMUNICATION PLAN

Internal Project Communication

How will team members communicate and share data?

Agency Communication

How will the Project Manager report information to your court?

LANGUAGE ACCESS

How will you address language access for Limited English Proficient users?

DISABILITY ACCESS

How will you ensure that your Live Chat service is accessible to court users with disabilities?

QUALITY ASSURANCE

How will you ensure that Live Chat Agents are adhering to your protocols?

STAKEHOLDER MANAGEMENT

How will the team get input from and report to stakeholders?

RISKS

Identify potential risks here. Some initial project risks may include the following:

Potential Risks	Potential Mitigation
The volume of users accessing Live Chat is higher than the live agent(s) can cover	The Project Team may adjust the number of hours and days Live Chat is offered and/or recruit additional agents
The volume of users accessing Live Chat is lower than expected	The Project Team may adjust the staffing schedule based on reviews of usage data for Live Chat, document assembly, and website users generally
Users need information that the Live Chat agent cannot provide	The Project Team may review and research additional chat content, direct users to local administrators or suggest they seek advice of an attorney
Live Chat software does not perform as anticipated	The Project Team will meet to develop a revised Project Plan for implementing Live Chat

COSTS

List the project costs and a budget here. A breakdown of anticipated costs is as follows:

ITEM	DESCRIPTION	SUBTOTAL	TOTAL
Live Chat Software	Live Chat program software with licenses for X agents and X administrators	\$	\$
Live Chat Team Members	Project Manager (% FTE)	\$	\$
	Technology Lead (% FTE)	\$	
	Subject Matter Expert (% FTE or hourly rate)	\$	
	Live Chat Agents (% FTE, hourly rate, or volunteer)	\$	
TOTAL COST			\$

Appendix B: Sample Live Chat Agent Agreement

As a Live Chat Agent for the Superior Court of California, County of _____,
I agree to the following (*please initial on the line next to each item and sign below*):

Preparation for Live Chat Agent Work and Team Communications

- _____ I will review the Live Chat Agent manual and participate in an initial training for Live Chat Agents.
- _____ I will review the Self-Help Guidelines to ensure compliance with standards for providing legal assistance in California Courts.
- _____ I will participate in Live Chat team meetings as scheduled.
- _____ I will notify the Project Manager as soon as possible if I am not able to serve as a Live Chat Agent during a scheduled shift.

Chat Conduct

- _____ I will use scripted responses when applicable and will follow the process for off-script responses when necessary.
- _____ I will not offer private consultation or legal representation to users of Live Chat.
- _____ I will not provide legal advice.
- _____ I will familiarize myself with the Live Chat Emergency and Safety Protocol and will follow it when necessary.
- _____ I will escalate issues to the Live Chat Project Manager, or a court legal subject matter expert, if there is a complaint or a concern from a user regarding the content of a chat.

Signature

Date

Appendix C: Sample Escalation Protocol

There are two situations in which it is important to consult other team members in order to provide the highest quality service to our customers:

1. If there is a request for legal information you cannot answer
2. If there is a complaint or a negative exchange with a chatter

Escalation of Questions

The majority of questions posed in chat conversations are fairly easy to anticipate and you will be able to answer them with scripted answers. However, occasionally an unanticipated question will arise from a chatter, or one easy question might lead to a more difficult one. If you are faced with a question you cannot answer, you may contact any of the following, as appropriate:

Type of Question	Name	Contact Information
Any	Subject Matter Expert	Phone: Email: Text:
Name Change	Subject Matter Expert	Phone: Email: Text:
Gender Change	Subject Matter Expert	Phone: Email: Text:
Gender Change	Local Nonprofit	Phone: Email: Text:
Clerk hours/ procedures	Court Staff	Phone: Email: Text:
Court Records	Court Staff	Phone: Email: Text:

If you are unable to reach someone who can help you resolve the chatter's question while you are still chatting, ask the chatter to provide an email address and let them know that you will follow up with them within 48 hours. Please note that even though the program may collect an email address from the chatter when they initiate the chat, it is

important to affirmatively request the email address where they would like to communicate with you if they would like for you to consult on their question and respond outside the chat. Do not assume that a chatter wants to be contacted or assume that the email address provided to initiate the chat is the same where they would like to be contacted in the future.

Escalation of Complaints

While most chatters are thrilled with the ability to use chat to quickly get their questions answered, occasionally there are complaints or issues that arise. Sometimes, chatters have a hard time communicating in writing or they are unsure themselves about the information they are seeking. Other times, they are asking for legal advice and as a Live Chat Agent, you are prohibited from providing it. This can lead to frustration and sometimes anger directed at you, the Live Chat Agent. In many cases, a frustrated chatter will simply leave the chat, but it is important to be prepared and trained to handle hostile chatters.

The following are instructions to follow in the case of a hostile chatter or a chatter who would like to lodge a complaint:

1. If a chatter becomes hostile, try to remain calm and provide neutral, informative responses.

Here is an example:

CHATTER: WHY are we required to publish the name changes? Do we have no privacy rights here?

AGENT: *The law requires that people who want to change their name legally must publish the court form showing that they are asking to change their name and listing the court hearing date. This is to help prevent fraud and to give others a chance to object. The legal requirement means that, except in certain cases, the court cannot issue a Name Change order unless the person requesting it has published the legal notice as required.*

2. Although there will be times when you have to tell a chatter that you cannot answer their questions, it is important to focus on what you can provide them. The following are examples:

AGENT: *If you have questions specific to your situation about whether you can file a Name Change case, you may want to consult an attorney. I am unable to give legal advice; I can only provide legal information. Would you like information about finding an attorney?*

CHATTER: the minor's father is not the birth certificate, does it matter?

AGENT: *Unfortunately I can't answer that question definitively. I recommend that you seek the advice of an attorney to talk about this issue. I'm sorry I can't give more specific information than that, but I am unable to give legal advice.*

AGENT: *If you would like to get legal information from a court in your county, you can visit <http://www.courts.ca.gov/find-my-court.htm> If you would like to get legal advice from an attorney, you can get help finding one at <http://www.calbar.ca.gov/Public/Need-Legal-Help/Lawyer-Referral-Service> Legal aid providers may offer free services to low- and moderate-income persons; you can find your local legal aid provider(s) here: <http://www.calbar.ca.gov/Public/Need-Legal-Help/Free-Legal-Help>*

CHATTER: Ok, thank you

CHATTER: Do we have to have an attorney to do this?

AGENT: *You are not required to have an attorney to ask for a name change. I will do my best to answer your questions and provide legal information. However, you may want to consult with an attorney for legal advice. This program does not provide legal advice and is not a substitute for the advice of an attorney. Would you like information about finding an attorney in your area?*

CHATTER: that would be great

AGENT: *If you would like to get legal advice from an attorney, you can get help finding one at <http://www.calbar.ca.gov/Public/Need-Legal-Help/Lawyer-Referral-Service> Legal aid providers may offer free services to low- and moderate-income persons; you can find your local legal aid provider(s) here: <http://www.calbar.ca.gov/Public/Need-Legal-Help/Free-Legal-Help>*

3. If a chatter uses obscene, inappropriate, or threatening language, you have the right to close the chat. Please report the incident to your supervisor.
4. If the chatter wants to lodge a formal complaint, ask the chatter to provide an email address and let them know that a manager will follow up with them within 48 hours. Please note that even though the program may collect an email address from the chatter when they initiate the chat, it is important to affirmatively request the email address where they would like to be contacted for purposes of lodging a complaint. Do not assume that the email address provided to initiate the chat is the same where they would like to be contacted in the future.
5. Sometimes, it helps to share your experiences with other team members. You should feel free to bring these situations to your team meetings for discussion with the group. You may get feedback to help you in the future and you may help others to learn how to handle challenging chatters.

Appendix D: Sample Live Chat Emergency and Safety Protocol

Introduction

When a chatter asks a question or raises an issue related to domestic violence, or makes any indication that they might be in danger, there are specific steps that you, as a Live Chat Agent should follow.

Your goals in these situations are to:

1. Ensure the chatter is safe before continuing the conversation.
2. Provide accurate information about legal options available to chatters who are victims of violence.

1. Ensure the chatter is safe

If a chatter states that they have questions related to a violence prevention issue, such as domestic violence, civil harassment, gun violence, or elder abuse, the chat agent should first inquire whether the chatter is safe. It is important to determine whether the issue is an emergent one before answering any other questions.

Here is an example of a chat conversation where the agent used a scripted answer to establish whether the chatter was safe:

CHATTER: I'm a victim of sexual assault so I want to change my last name

AGENT: *Are you safe? Do you need information about getting a restraining order or other legal help?*

CHATTER: Yes I am safe and yes I will need other info on legal help

AGENT: *I'm glad you are safe now. I'll do my best to answer any questions you have about Name Change or other legal help.*

If the chatter does not give assurances that they are actually safe, tell them to call 911 immediately:

CHATTER: I'm a victim of sexual assault so I want to change my last name

AGENT: *Are you safe? Do you need information about getting a restraining order or other legal help?*

CHATTER: I don't know. I'm really scared.

AGENT: *If you are in immediate danger, please call 911 right now. I cannot help you through Chat with an emergency situation, but I want you to be safe. I will stay on the Chat with you until emergency assistance arrives.*

2. Provide information about violence prevention

If your Live Chat service is designed to assist people with some kind of civil restraining order, all of the content developed and put into scripted answers will relate to violence prevention. However, even in areas of law not directly related to violence prevention, there may be special considerations or rules for those who have experienced domestic

violence. For example, California law provides for a confidential name change (without a publication requirement) in certain situations.

The following is an example of a chat conversation in which the agent used a scripted answer to first establish that the chatter was safe, and then to provide information related to violence prevention in the context of name change:

CHATTER: There was a criminal case against him for me because he had threatened to kill me and I went to court to make sure that I had full custody and I was granted full legal and physical custody and the restraining order also

AGENT: *Are you safe? Do you need information about getting a restraining order or other legal help?*

CHATTER: I am safe. This was a long time ago.

AGENT: *If you decide to start a new Name Change case, you may be able to skip the publication portion of the case if you are concerned he will find you. If you (and your children) have a confidential address through the Safe At Home program to avoid domestic violence, if you or your child are a victim of sexual assault, or your are in the State Witness Program, you may ask that the court keep your address confidential and that you not have to publish your request in a newspaper. More information is available in the court's information sheet NC-400-INFO, available at <http://www.courts.ca.gov/documents/nc400info.pdf>*

Here is an example of a situation in which there was no immediate danger suggested, but the agent still provided information related to domestic violence:

CHATTER: if i do not know where father is, had no contact for several years, how do i handle that?

AGENT: *You will have to ask the court for special permission to get the name change without letting the other parent know. To do this, the judge will ask you to look for the other parent, and you have to look as hard as possible, asking friends and family and looking up public records. Ask your court clerk or self-help center what the judge in your local court will want you to do to try to find the other parent.*

You will have to file papers explaining everything you tried to find your child's other parent, when you did it, and what the result was. The judge will take this very seriously (to make sure you tried everything possible) before changing your child's name without the other parent's knowledge.

If you or your child(ren) are a victim of domestic violence or sexual assault or are in the State Witness Program, you should talk to someone at your local Self-Help Center or an attorney about service requirements for your case.

Please note: If you frequently encounter questions related to violence prevention and *do not* have a scripted answer for them, it is important to communicate that to the Project Manager and Subject Matter Experts on the Live Chat team so that scripted answers can be developed to help you respond appropriately and quickly to these inquiries.

Appendix E: Sample Live Chat Customer Satisfaction Survey

Thank you for taking our survey. Your responses will help us improve our service. It will take less than 1 minute to complete.

1. How easy was live chat to use?

- Extremely easy
- Somewhat easy
- Neither easy nor difficult
- Somewhat difficult
- Extremely difficult

2. How well did you feel your live chat agent understood your questions?

- Very well
- Moderately well
- Not at all well

3. Was your live chat agent able to respond to all, some or none of your specific questions?

- All
- Some
- None

4. Were the answers your live chat agent gave easy to understand?

- Definitely
- Somewhat
- Not at all

5. What is your level of trust with your live chat agent?

- Very high
- Somewhat high
- Neither high nor low
- Somewhat low
- Very low

If you are planning to file a name change with the court, we are interested to learn whether live chat helped you prepare. Please provide your email address if it's okay for us to contact you in a few weeks. Thank you!

Live Chat Toolkit

Section 2

Informational Content

Name Change in California Informational Content

June 2019

This document is based on results of the Judicial Council's Live Chat pilot project, which took place between October 2018 and March 2019. This toolkit has not been reviewed or approved by the Judicial Council but is made available as a best practices document to organizations interested in pursuing local Live Chat projects.

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BEFORE YOU START A CASE

Some options you can consider before starting a Name Change case are:

- You can use a different name in your everyday life. In most cases, in order to change your name on legal identity documents, such as a driver's license or passport, you need to legally change your name through a court order.
- If you are getting married and want to change your middle or last name(s), you may not have to go to court. See the **Marriage** section on pages 5-6 for more information.
- If you are getting divorced or have gotten divorced in California and want to change your name back to your birth name or a former legal name, you may be able change your name during your divorce (dissolution) case. See the **Divorce** section on pages 6-7 for more information.
- If you are becoming a U.S. Citizen, you may be able to change your name during the citizenship process. See the **Citizenship** section on page 7-8 for more information.
- If you need to correct a clerical error on an existing legal identity document, you may contact the agency that issued the document to request a correction. For more information about contacting agencies that issue legal identity documents, see the **Change Your Legal Identity Documents** section on page 17.
- If you want to change your legal name on your legal identity documents and are not eligible to change your name using one of the methods above, you may need to get a court order to change your name. See the **Overview of the Name Change Case Process** section beginning on page 9.

CHANGE YOUR NAME WITHOUT FILING A NAME CHANGE CASE

MARRIAGE AND DIVORCE

CHANGE YOUR NAME - MARRIAGE

BEFORE YOU GET MARRIED

If you are getting married and want to change your middle or last name(s), you may not have to go to court. At the time you apply for a marriage license, you and your partner may choose the new name(s) you want to be known as after your marriage. If you want to legally change your first name, you will need to file a Name Change case.

Each party to the marriage may adopt any of the following last names:

- The current last name of the other spouse
- The last name of either spouse given at birth
- A name combining all or a part of the current last name (or the last name of either spouse at birth) into a single last name
- A combination of last names

Each party to the marriage may adopt any of the following middle names:

- The current last name of the other spouse
- The last name of either spouse given at birth
- A combination of the current middle name and the current last name of the person or spouse

If you choose not to include a new name at the time you apply for a marriage license, you will NOT be able to add it to your marriage license or certificate after your marriage ceremony has been performed. If you want to change your name after you are married, you must request a name change through a Name Change case.

If you want to change your first name or you want to change your middle and/or last name(s) to something other than what is allowable on a marriage license, you must change your legal name through a Name Change case. You may not change your first name on a marriage license. For more information about Name Change cases in California, visit <http://www.courts.ca.gov/selfhelp-namechange.htm>

For more information about the options you and your partner have for changing your name on your marriage license, see this pamphlet about the Name Equality Act:

<https://www.cdph.ca.gov/Programs/CHSI/CDPH%20Document%20Library/CHSI-The-Name-Equality-Actof2007-4-2017.pdf#search=name%20equality%20act>

AFTER YOU GET MARRIED

If you chose a new middle or last name on your marriage license and want to change your legal identity documents, you will need a copy of your marriage certificate showing your new name.

For more information about getting a copy of your California marriage certificate, visit <https://www.cdph.ca.gov/Programs/CHSI/Pages/Vital-Records-Obtaining-Certified-Copies-of-Marriage--Divorce-Records.aspx> and see this pamphlet, which also includes the application to request copies and contact information for local county clerks.

If the new name you want is not listed on your marriage certificate, you may change your legal name through a Name Change case. For more information about starting a Name Change case, visit <http://www.courts.ca.gov/22489.htm>

Once you have your marriage certificate or Decree Changing Name listing your new legal name, you can take this document to the agencies that issue legal documents and request new documents. These agencies may charge fees to issue you new documents.

CHANGE YOUR NAME – DIVORCE

DURING YOUR DIVORCE

If you want to change your name back to your birth name or your legal name before getting married and you have an OPEN divorce case in California (you do not have a final Judgment), you can ask the court to restore your birth or former name when your final judgment or divorce decree is entered. More information about completing your divorce case is available here: <http://www.courts.ca.gov/1035.htm>

Once you have a final Judgment listing your new legal name, you can take this document to the agencies that issue legal documents and request new documents. These agencies may charge fees to issue you new documents.

If you want to change your name to something other than your birth name or your former name, you will need to file a Name Change case.

AFTER YOUR DIVORCE

If you want to change your name back to your birth name or your legal name before getting married and you have a COMPLETED divorce case in California, you can request a name change using your divorce case number and Form FL-395, *Ex Parte Application for Restoration of Former Name After Entry of Judgment and Order*. You can find the form here: <http://www.courts.ca.gov/documents/fl395.pdf>

You can complete this form with the case information (including the case number and courthouse) from your divorce case, and file the form with the court clerk where your divorce

case was filed. You should include the original FL-395 form with one copy, along with a copy of your Judgment (FL-190) and a self-addressed stamped envelope. If you have questions about completing or filing this form, you can ask for help at a self-help center in your local court.

Once you have your FL-395 signed by a judge and listing your new legal name, you can take this document to the agencies that issue legal documents and request new documents. These agencies may charge fees to issue you new documents.

If you want to change your name to something other than your birth name or your former name, you will need to file a Name Change case.

CITIZENSHIP

CHANGE YOUR NAME – NATURALIZATION

CHANGE YOUR NAME DURING THE NATURALIZATION PROCESS

You may be able to change your name during the citizenship process; you can find more information at <https://www.uscis.gov/sites/default/files/files/article/M-476.pdfv>

When you complete the N-400 form through US Citizenship and Immigration Services (USCIS) to apply for Naturalization, you may request that your name be legally changed by completing Part 1, Item 4. For information on how to request a legal name change on the N-400 Application for Naturalization, see page 5 of the Instructions for Form N-400 (PDF), available here: <https://www.uscis.gov/n-400>

If you did not request a legal name change on your N-400, you may still be able to request a name change at your USCIS interview.

To receive a court order showing that your name was changed during the naturalization process, you will need to attend an oath ceremony at a court in your area. You should receive a piece of paper proving that you had a legal name change (separate from your Certificate of Naturalization). You can use this paper to change your name with the Social Security Administration and other agencies that issue legal identity documents.

Once you have attended your oath ceremony and have received your Certificate of Naturalization and/or the paper verifying your legal name change, you can change your name with the Social Security Administration. For more information, see page 39 of this USCIS publication: <https://www.uscis.gov/sites/default/files/files/article/chapter5.pdf>

If you are a naturalized U.S. Citizen and did not change your name using one of these methods during the naturalization process, and you now want to change your legal name, you will need to file a Name Change case. For more information about Name Change cases in California, visit <http://www.courts.ca.gov/selfhelp-namechange.htm>

CHANGE YOUR NAME ON YOUR U.S. PASSPORT

CHANGE YOUR NAME ON YOUR U.S. PASSPORT

If you need to change your name on your U.S. Passport, several options are available. In most cases, you will need a certified copy of your name change document (Decree Changing Name, Judgment (final divorce decree), marriage certificate, etc.) or other documentation of your name change. For more information about the forms, fees, and other requirements, see <https://travel.state.gov/content/travel/en/passports/apply-renew-passport/change-correct.html>

OVERVIEW OF THE NAME CHANGE CASE PROCESS

INFORMATION YOU WILL NEED TO FILL OUT YOUR FORMS

You will need to gather the following information to fill out the forms needed to start a Name Change case:

- **The name of the county where you live:** You are eligible to file in the California county where you live at the time you file your forms. Some counties may require proof that you live in the county (e.g. a utility bill with your current name and address). To find your court, visit <http://www.courts.ca.gov/find-my-court.htm>. If you do not live in California, you can contact the court where you live to get more information about how to legally change your name.
- **The address of the court where you will file your forms:** Sometimes Name Change cases are only accepted at specific courthouses, even if they are not the ones closest to you. See the **Information About Your County** section below to find out whether your county requires you to file at a specific courthouse.
- **Any and all names you want to change**
- **The exact name you want your name changed to**
- **The name of the court-approved newspaper where you will publish your forms (if required)**
- **Case type:** Name Change cases are considered “Unlimited Civil” cases. You will need this information for form CM-010 and to find the fee for filing a new case.
 - ****In Santa Clara and Sonoma counties only, Name Change cases are heard in the Probate division.**

HOW A CASE WORKS

STEPS IN A NAME CHANGE CASE

Generally, Name Change cases follow these steps:

1. **Fill out your court forms.** You can download and complete individual forms, use an online program to complete the forms, or visit your local court to get the forms. You will need to choose the newspaper you want to publish your forms in after your forms are filed. Some counties also require local forms. If you want to request a fee waiver, you will also need to complete fee waiver forms.
2. **Have your forms reviewed.** If your court’s self-help center helps with name change cases, you can ask them to review your paperwork. This step is optional. You can find

the Self-Help Center in your county by visiting <http://www.courts.ca.gov/selfhelp-selfhelpcenters.htm>

- 3. Make at least 2 copies of all your forms.** Make two complete copies of all your forms. When you file your forms, the court will keep the original set and stamp your copies. Keep one set of copies for yourself; the other set of copies is for the newspaper that will publish for your forms (if required). If you are filing to change the name of a child and the other parent did not agree and sign the court forms, you may need an extra set of copies to have the other parent served.
- 4. File your forms with the court clerk.** To start your case, you will need to file your forms at a court in the county where you live and pay the filing fee. If you cannot afford the fee, you can ask for a fee waiver by filing fee waiver forms. The court will stamp a hearing date on your forms.

If you cannot file the forms in person, you may be able to file your forms by mail or electronically (if your county offers this service).

- 5. Publish the Order to Show Cause for Change Name (if required).** After you file your forms, take a stamped copy to the newspaper of general circulation that you listed on your forms. They should publish your forms once a week for 4 weeks in a row, and issue you a Proof of Publication form. The newspaper will charge a separate fee for this service.
- 6. Serve the other parent (if required).** If you are requesting a name change for a child under 18 and the other parent did not sign the Petition, you may need to have the other parent served with a copy of the forms.
- 7. Go to your court hearing.** Go to court on your hearing date. Take your Proof of Publication form that the newspaper completes for you, and a Decree Changing Name for the judge to sign.
- 8. Get your Decree Changing Name from the court.** If the judge approves your request to change your name, the judge will sign the Decree Changing Name. Once the Decree (your court order) is issued, get a certified copy from the court.
- 9. After your case is complete, use your court order to change your name on your legal identity documents.**

Each of these steps is discussed in great detail in the sections below.

START A CASE

START YOUR CASE - NAME CHANGE (ADULT)

To start a Name Change case for an adult, you will first need to complete the court forms needed to file a case with the court.

If you are an adult and want to request a name change for yourself, you can use an online program that will help you fill out the forms. You can also use this program if you are an adult and want to change your name to match your gender identity. The online program available to help with filling out forms is available here: <http://www.courts.ca.gov/35393.htm> You will have the option to create a free online account to save your work, in case you want to make changes. When you finish answering questions in this program, print your forms.

If you want to download the forms you need and fill them out on your computer or print and complete them by hand, you can start at <http://www.courts.ca.gov/22489.htm>

An informational instruction sheet, NC-100-INFO, is available here: <http://www.courts.ca.gov/documents/nc100info.pdf>

The forms you will need to start a case include:

1. NC-100, *Petition for Change of Name*
2. NC-110, *Attachment to Petition for Change of Name*
3. NC-120, *Order to Show Cause for Change of Name*
4. CM-010, *Civil Case Cover Sheet*

Depending on the county you plan to file in, there may also be additional local forms that the court requires. Information about local forms may be available on your county court's website, on this site under the **INFORMATION ABOUT YOUR COUNTY** section, and/or at your local self-help center.

If you are changing your name to conform to your gender identity or are changing your name and requesting recognition of your gender change, see **THIS SECTION** for the forms you will need to start your case.

START YOUR CASE - NAME CHANGE (MINOR)

To start a Name Change case for a minor, you will first need to complete the court forms needed to file a case with the court. Note: a parent or other adult (such as a guardian) must be the Petitioner for a Name Change for a minor.

If you are an adult and want to request a name change for up to ten minors, there is an online program available to help you fill out the forms. The online program is available here: <http://www.courts.ca.gov/35393.htm> You will have the option to create a free online account to save your work, in case you want to make changes. When you finish answering questions in this program, print your forms. Please note that your court may require you to submit local

forms that are not included in this program; you will need to find those on the court's website after you complete the forms in this program.

If you and the other parent agree on changing the child's name, start here:

<http://www.courts.ca.gov/35830.htm>

If you are the only parent filing change the child's name, start here:

<http://www.courts.ca.gov/35829.htm>

If you want to download the forms you need and fill them out on your computer or print and complete them by hand, you have three options:

- If both parents agree to change their child's name: <http://www.courts.ca.gov/22584.htm>
- If only one parent is filing to change a child's name: <http://www.courts.ca.gov/22583.htm>
- If you are a guardian changing a child's name: <http://www.courts.ca.gov/22585.htm>

An informational instruction sheet, NC-100-INFO, is available here:

<http://www.courts.ca.gov/documents/nc100info.pdf>

The forms you will need to start a case include:

1. NC-100, *Petition for Change of Name*
2. NC-110, *Attachment to Petition for Change of Name*
3. NC-120, *Order to Show Cause for Change of Name*
4. CM-010, *Civil Case Cover Sheet*

If you are a guardian changing a child's name, you will also need form NC-110G, *Supplemental Attachment to Petition for Change of Name (Declaration of Guardian)*.

Depending on the county you plan to file in, there may also be additional local forms that the court requires. Information about local forms may be available on your county court's website, on this site under the **INFORMATION ABOUT YOUR COUNTY** section, and/or at your local self-help center.

If you are changing the minor's name to conform to your gender identity or are changing the minor's name and requesting recognition of a gender change, see **THIS SECTION** for the forms you will need to start your case.

START YOUR CASE - NAME CHANGE FOR TWO OR MORE FAMILY MEMBERS

If you are filing a Name Change case for yourself and your minor child(ren), or just your minor child(ren), you should be able to file together under one case. If you and one or more adults would like to change your names together and file under one case, you should check with your local court or Self-Help Center to see if they will allow you to file together.

If your court will allow you to request a name change for yourself and your minor children, you can use an online program that will help you fill out the forms. The online program available to help with filling out forms is available here: <http://www.courts.ca.gov/35393.htm> You will have

the option to create a free online account to save your work, in case you want to make changes. When you finish answering questions in this program, print your forms. Please note that your court may require you to submit local forms that are not included in this program; you will need to find those on the court's website after you complete the forms in this program.

Follow the instructions to start a Name Change case for an adult, listing the parent or guardian as the Petitioner (even if the parent or guardian is not changing their name).

On the NC-100, list each person whose name you are requesting to change. Fill out one NC-110 form (*Attachment to Petition for Change of Name*) for each person whose name you are requesting to change.

Since you will only be filing one NC-120, *Order to Show Cause for Change of Name*, form for all family members, you should only need to pay one filing fee and one publication fee.

BEFORE YOU FILE

HAVING YOUR FORMS REVIEWED

You may be able to ask the Self-Help Center or another provider in your county to review your forms to make sure they are complete. This step is optional, and services at court self-help centers are free.

You may be able to find information about help your county provides with Name Changes in the **Information About Your County** section below. You can also find the Self-Help Center in your county by visiting <http://www.courts.ca.gov/selfhelp-selfhelpcenters.htm>

COST

COURT FEES

Right now, it costs \$435 to file a new case with the court. If you can't afford the court filing fee, you can ask the Court to allow you to file a case at no cost or reduced cost by asking for a fee waiver.

In most cases, you will also need to publish information about your case in a newspaper. Fees for publication may vary. The court filing fee (or a fee waiver, if you have one) does not cover the cost of publishing in a newspaper, which you will have to pay directly to the newspaper.

If you would like a certified copy of your final court order (Decree Changing Name), which the agencies issuing legal identity documents may require, you may need to pay an additional fee once your case is complete if you do not have a fee waiver. The cost for a certified (official) copy of a Decree Changing Name is \$0.50 per page plus a \$25 certification fee.

FEE WAIVERS

If you can't afford the court filing fee, you can ask the Court to allow you to file a case at no cost or reduced cost. See <http://www.courts.ca.gov/selfhelp-feewaiver.htm> for more information and to get the court forms to ask for a fee waiver. The fee waiver does not cover the cost of publishing in a newspaper, which you will have to pay directly to the newspaper.

If you need help filling out the forms to ask for a fee waiver, you can review [instructions at http://www.courts.ca.gov/documents/fw001instruct.pdf](http://www.courts.ca.gov/documents/fw001instruct.pdf). You can also watch a video presentation at <http://www.cc-courts.org/video.aspx?File=FW-001> (you will need to have Flash enabled). If you would like to get help in person, you can visit <http://www.courts.ca.gov/selfhelp-selfhelpcenters.htm>

FILING YOUR FORMS AT THE COURT

WHERE TO FILE YOUR CASE

You are eligible to file in the California county where you live at the time you file your forms. Some counties may require proof that you live in the county (e.g. a utility bill with your current name and address). To find your closest court, visit <http://www.courts.ca.gov/find-my-court.htm>. If you do not live in California, you can contact the court where you live to get more information about how to legally change your name.

Sometimes Name Change cases are only accepted at specific courthouses in your county, even if they are not the ones closest to you. See the **Information About Your County** section below to find out whether your county requires you to file at a specific courthouse.

HOW TO FILE YOUR CASE

Once you have printed, reviewed, and signed all your forms, you should make at least two (2) copies of all your forms and take the originals and the copies to the courthouse. You will need to file them with the court clerk and pay the filing fee (or file the forms to request a fee waiver). Some counties may require proof that you live in the county (e.g. a utility bill with your current name and address). See the **Information About Your County** section below to find out whether your county requires additional information at the time of filing.

The clerk will keep the originals and stamp and return your copies. Your Order to Show Cause forms will have information about the date, time, and room number for your court hearing.

Generally, you may have any adult file the forms on your behalf; you do not need to appear in person at the time of filing.

You may be able to file your documents by mail, or electronically file your documents with the court (if your county offers this service). For more information about filing by mail or electronically, visit your county court's website for more information. You may find your court's website at <http://www.courts.ca.gov/find-my-court.htm>

AFTER YOU FILE, BEFORE YOUR HEARING

PUBLICATION

The law requires that people who want to change their name legally through a Name Change case must publish the court form showing that they are asking to change their name and listing the court hearing date. This is to help prevent fraud and to give others a chance to object. Some exceptions to the publication requirement include a name change to match gender identity and some domestic violence situations.

The legal requirement means that, except in certain cases, the court cannot issue a Name Change order unless the person requesting it has published the legal notice as required. This is true even if the name change is for a child, if the person wants to go back to a former legal name, or if the change is relatively minor.

Publishing a legal notice must be done in a court-approved newspaper, at least once per week for four weeks in a row after the Name Change forms are filed with the court and a court hearing date is issued. The cost to publish in a court-approved newspaper varies from paper to paper, but it is often anywhere from \$50 to \$500. You can contact newspapers approved by your county to see what exactly they charge and which would be a good fit for your case.

If you need a list of court-approved newspapers for your county, contact your local court or self-help center or visit the **Information About Your County** section below to see if your county maintains a list online.

Once you have filed your forms, take a stamped copy of the forms to the court-approved newspaper you chose and listed on your forms before filing. They will publish the forms for you and complete a Proof of Publication form, which you should take with you to the court hearing.

GETTING THE OTHER PARENT SERVED

Once your completed forms are filed with the court and stamped with a case number and a hearing date, someone over the age of 18, other than you, must personally hand a copy of the papers to the other parent and sign a Proof of Service form, NC-121. You should bring the original Proof of Service form, along with one copy, with you to court and file it with the clerk at your hearing. You can find the Proof of Service form at <http://www.courts.ca.gov/documents/nc121.pdf>

If you cannot find the other parent for service, you will have to ask the court for special permission to get the name change without letting the other parent know. To do this, the judge will ask you to look for the other parent, and you have to look as hard as possible, asking friends and family and looking up public records. Ask your court clerk or self-help center what the judge in your local court will want you to do to try to find the other parent.

You will have to file papers explaining everything you tried to find your child's other parent, when you did it, and what the result was. The judge will take this very seriously (to make sure

you tried everything possible) before changing your child's name without the other parent's knowledge.

If you or your child(ren) are a victim of domestic violence or sexual assault, if you are trying to avoid human trafficking, or are in the State Witness Program, you should talk to someone at your local Self-Help Center or an attorney about service requirements for your case.

HEARING

ORDER TO SHOW CAUSE HEARING: WHAT HAPPENS AND WHAT TO BRING

You should plan to bring the Affidavit or Proof of Publication form issued by the newspaper you used for publication with you to your Order to Show Cause hearing.

If you are changing a minor's name and both parents signed the forms before filing, both of you should plan to attend the hearing.

If you are changing a minor's name and you are the only parent who filed the request to change your child's name, you should bring the NC-121, *Proof of Service*, form with you as proof that the other parent was served with copies of the forms.

ORDER TO SHOW CAUSE HEARING: DO I NEED TO GO?

You should plan to appear in person at the court hearing listed on your forms, unless the court has given you other instructions. If you are unable to attend your court hearing in person, you should contact the court clerk where your case is assigned as soon as possible.

You may be able to appear by phone using a service called *CourtCall*, if your court allows this service. *CourtCall* does charge fees that are not covered by the court filing fee or fee waiver. If you are interested in appearing by phone via *CourtCall*, contact the court clerk where your case is assigned.

In some counties, you may check online the day before the scheduled hearing to see the court's "tentative ruling" on your request. If the court says that the petition is "granted," you do not need to go to the hearing. You will still need to go pick up the signed order and obtain a certified version at the court.

AFTER YOUR NAME CHANGE

GET A COPY OF YOUR COURT ORDER

GET A CERTIFIED COPY OF YOUR COURT ORDER (DECREE)

If you have already gotten a court order in your Name Change case and need a copy of your Decree, you will need to get a copy from the County courthouse where the case was originally filed. Using your court case number, you may request a copy of the Decree from the court clerk.

If you do not have your case number, you may be able to do an online search on your county court's website for the case number using your former name. Some courts may charge for this service. You may also be able to find your court case number by going to a courthouse in the county where you originally filed and checking with the clerk.

The cost for a certified (official) copy of a Decree Changing Name is \$0.50 per page plus a \$25 certification fee. If you can't afford the court fee, you can ask the Court to allow you to file a case at no cost or reduced cost.

CHANGE YOUR LEGAL IDENTITY DOCUMENTS

Once you have your Decree Changing Name or other name change document listing your new legal name, you can take this document to the agencies that issue legal documents and request new documents. These agencies may charge fees to issue you new documents.

CHANGE YOUR SOCIAL SECURITY CARD

To change your legal name on your U.S. Social Security Card, contact the Social Security Administration. You can find your local Social Security office by using this link:
<https://secure.ssa.gov/ICON/msg012View.do>

The documents you'll need to bring to the Social Security office are listed at
<https://faq.ssa.gov/en-us/Topic/article/KA-01981>

CHANGE YOUR CALIFORNIA DRIVER'S LICENSE OR IDENTIFICATION CARD

To change your legal name on your California Driver's License or Identification Card, contact the Department of Motor Vehicles. You can find your local DMV office by using this link:
https://www.dmv.ca.gov/portal/dmv/detail/fo/offices/toc_fo

A checklist of what you'll need to change your name with the DMV is here:
https://www.dmv.ca.gov/portal/dmv/?1dmy&urile=wcm:path:/dmv_content_en/dmv/dl/checklists/namechnq

For more information about the documents you need to apply for a Real ID compliant California Driver's License or Identification Card, visit <https://www.dmv.ca.gov/portal/dmv/detail/realid/checklist>

CHANGE YOUR CALIFORNIA BIRTH CERTIFICATE

To amend your California Birth Certificate after a name change by court order, see this pamphlet:

<https://www.cdph.ca.gov/Programs/CHSI/CDPH%20Document%20Library/Court%20order%20name%20change.pdf>

To correct a clerical error on your California Birth Certificate, see this pamphlet:

[https://www.cdph.ca.gov/Programs/CHSI/CDPH%20Document%20Library/ADA_Affidavit%20to%20Amend%20Birth%20\(01-18\).pdf](https://www.cdph.ca.gov/Programs/CHSI/CDPH%20Document%20Library/ADA_Affidavit%20to%20Amend%20Birth%20(01-18).pdf)

CHANGE YOUR U.S. PASSPORT

If you need to change your name on your U.S. Passport, several options are available. To change your name, you may need a certified copy of your name change document (Decree Changing Name, Judgment (final divorce decree), marriage certificate, etc.) or other documentation of your name change. For more information about the forms, fees, and other requirements, see <https://travel.state.gov/content/travel/en/passports/apply-renew-passport/change-correct.html>

GET HELP

LEGAL ADVICE

FIND AN ATTORNEY (AND DO I NEED ONE)?

You are not required to have an attorney to file a Name Change case with the court; you may choose to represent yourself. Information is available on the court's website to help you, and you may be able to get help with the forms at your court's self-help center. These services can provide you with legal information. If you would like to get legal information from a court in your county, you can visit <http://www.courts.ca.gov/find-my-court.htm>

However, you may want to consult with an attorney for legal advice. If you would like to get legal advice from an attorney, you can get help finding one at <http://www.calbar.ca.gov/Public/Need-Legal-Help/Lawyer-Referral-Service> Legal aid providers may offer free services to low- and moderate-income persons; you can find your local legal aid provider(s) here: <http://www.calbar.ca.gov/Public/Need-Legal-Help/Free-Legal-Help>

SELF-HELP RESOURCES

GET HELP WITH INFORMATION AND FORMS

Information is available on the court's website to help you, and you may be able to get help with the forms at your court's self-help center. These services can provide you with legal information. If you would like to get legal information from a court in your county, you can visit <http://www.courts.ca.gov/find-my-court.htm>

For more information about services available in your county, see your county court's website or the **Information About Your County** section below.

DOMESTIC VIOLENCE

If you are in danger now, you can call 911. You can also call the National Domestic Violence Hotline 1-800-799-SAFE (7223) [TTY 1-800-787-3224], or find [your local domestic violence shelter](http://www.cpedv.org/domestic-violence-organizations-california) at <http://www.cpedv.org/domestic-violence-organizations-california>

For more information about domestic violence and restraining orders, visit the court's website at <http://www.courts.ca.gov/selfhelp-domesticviolence.htm>

If you (and your children) have a confidential address through the Safe At Home program to avoid domestic violence, if you or your child are a victim of sexual assault, if you are trying to avoid human trafficking, or you are in the State Witness Program, you may ask that the court keep your address confidential and that you not have to publish your request in a newspaper.

More information is available in the court's information sheet [NC-400-INFO](#), available at <http://www.courts.ca.gov/documents/nc400info.pdf>

If you don't have a confidential address through Safe at Home but you want one, you can call 1-877-322-5227 or visit www.sos.ca.gov/safeathome

You can ask the court to protect your Name Change case by sealing the record so the case itself is not accessible by the public. If you want to request that your Name Change case be sealed, you may want to contact your [local Self-Help Center](#) or an attorney for assistance.

NAME CHANGE AND GENDER

GENERAL INFORMATION FOR GENDER CHANGE IN CALIFORNIA

This website has information and forms available to help with asking the court for a recognition of a gender change: <http://www.courts.ca.gov/genderchange.htm>

You do not need a court ordered recognition of gender change your California driver's license, social security card, or U.S. passport. You also do not need a court order to have a new birth certificate issued reflecting a change of gender (for California birth records). If you were born outside of California and want to have your birth certificate amended, you may want to get a court ordered recognition of gender change to use in your efforts.

For a person born in California, you can request that the person's gender be changed on their birth certificate with or without a court order (though you do need a court order to change a *name* on a California birth certificate). To request a change of gender on a birth certificate WITHOUT a court order, see this pamphlet for more information:
[https://www.cdph.ca.gov/Programs/CHSI/CDPH%20Document%20Library/ADA_Sex%20Change%20\(01-18\).pdf](https://www.cdph.ca.gov/Programs/CHSI/CDPH%20Document%20Library/ADA_Sex%20Change%20(01-18).pdf)

You do not need a court ordered recognition of gender change your California driver's license. Beginning January 1, 2019, the DMV will allow you to select a gender category of female, male, or nonbinary for your California driver license or identification card. For more information, visit: https://www.dmv.ca.gov/portal/dmv/detail/dl/gender_id

However, you DO need a court order for a change of name.

If you are requesting recognition of a gender change or a name change to conform to your gender identity, you do not need to publish your request in a newspaper.

INFORMATION ABOUT YOUR COUNTY

The information in this section was current as of March 2019, but be aware that local courts may change their policies and procedures at any time. To verify that you have the most current information, visit your court's website or self-help center.

LOS ANGELES

General information: For information about Name Change cases in Los Angeles County, visit <http://www.lacourt.org/division/civil/CI0046.aspx>

Where to file: Anyone who lives in Los Angeles County is eligible file a new case in the Stanley Mosk Courthouse in downtown Los Angeles. You may also be eligible to file in a court closer to you. To find the courthouse closest to where you live in Los Angeles County, visit this website to identify the court nearest you where you may file an Unlimited Civil (Name Change) case: <http://www.lacourt.org/filinglocator/ui/filingsearch.aspx>

The Los Angeles Superior Court also maintains a list of courthouses where you may file Name Change cases:

<http://www.lacourt.org/division/civil/pdf/namechangelocationsandinstructions.pdf>

Local forms: Los Angeles County requires that two local forms, LACIV 109 and LACIV 226, be submitted along with the other forms needed to start a Name Change case. These forms are available online at <http://www.lacourt.org/forms/pdf/LACIV109.pdf> and <http://www.lacourt.org/forms/pdf/LACIV226.pdf>

List of court-approved publications: The County of Los Angeles maintains a list of court-approved newspapers at <https://avote.net/home/county-clerk/fictitious-business-names/publication>

Get help at the court: Self-help centers in Los Angeles County can assist with Name Change cases (except at the Stanley Mosk and Whittier locations). For information about the location and hours of the self-help centers, see

http://www.lacourt.org/selfhelp/resourcesandassistance/SH_RA001.aspx

Search for a case online: To search for a case by name or case number, visit <https://www.lacourt.org/paonlineservices/civilindex/cipublicmain.aspx?forceview=Y> or call 213-830-0803 from 8:30am – 10:30am or 1:30pm - 3:30pm PST.

SAN DIEGO

General information: For information about Name Change cases in San Diego County, visit http://www.sdcourt.ca.gov/portal/page?_pageid=55,1554977&_dad=portal&_schema=PORTAL

Where to file: In San Diego County, Name Change Petitions must be filed only in the North County or Central divisions. For more information, visit http://www.sdcourt.ca.gov/portal/page?_pageid=55,1555635&_dad=portal&_schema=PORTAL

Local forms: San Diego County has one local form available for optional use, SDSC CIV-256 *Application and Declaration in Support of Request to Dispense with Notice to Minor's Parent*. This form is available online at http://www.sdcourt.ca.gov/pls/portal/docs/PAGE/SDCOURT/GENERALINFORMATION/FORMS/CIVILFORMS/CIV256_RE.PDF

List of court-approved publications: The San Diego Court maintains a list of court-approved newspapers, SDSC ADMIN-335, at <http://www.sdcourt.ca.gov/pls/portal/docs/PAGE/SDCOURT/GENERALINFORMATION/FORMS/ADMINFORMS/ADM335.PDF>

Get help at the court: The Civil Business Office of the San Diego Court may offer help with Name Change forms.

Search for a case online: To search for a case by name or case number, visit <https://roa.sdcourt.ca.gov/roa/>

ALAMEDA

General information: For information about the Alameda County Courts, visit www.alameda.courts.ca.gov

Where to file: In Alameda County, Name Change Petitions must be filed either the Hayward or Oakland courts only. They are located at:

- Hayward Hall of Justice: 24405 Amador Street, Hayward, CA 94544
- René C. Davidson Courthouse: 1225 Fallon Street, Oakland, California 94612

Local forms: Alameda County requires one local form to be submitted along with the other forms needed to start a Name Change case. This form is available online at http://www.alameda.courts.ca.gov/Resources/Documents/form_202_19.pdf

Court-approved publications: You may obtain a complete list of court-approved publications from the self-help center at the Hayward Hall of Justice; this form is not available online. A partial list is available here:

- Bay Area News Group: email OTLegals@bayareanewsgroup.com or call 510-723-2850
- Inter City Express: <https://www.intercityexpress.news/home.cfm?ref=legalnotices&disp=1>
- Daily Journal: call 800-788-7840 ext. 5399, email Civil@DailyJournal.com or visit <https://www.legaladstore.com/frmMain.cfm#section=home.cfm%3Fpage%3Dforms%26StateId%3D6>
- Alameda Sun: email legals@alamedasun.com or call 510-263-1471

Get help at the court: The self-help center in Hayward provides help with Name Change cases. For more information about locations and hours, visit <http://www.alameda.courts.ca.gov/Resources/Documents/Self%20Help%20Center%20Flyer%20English%20Rev%204.25.18%20draft.pdf>

Search for a case online: To search for a case by name or case number, visit <https://publicrecords.alameda.courts.ca.gov/PRS/>

Tentative Rulings: Tentative rulings may be accessed, using your court case number prior to your scheduled court hearing, at <http://www.alameda.courts.ca.gov/Pages.aspx/Tentative-Rulings>

ORANGE

General information: For information about Name Change cases in Orange County, visit <https://www.occourts.org/self-help/namechange/>

Where to file: In Orange County, Name Change Petitions must be filed at the Central Justice Center, located at 700 Civic Center Dr. West, Santa Ana, CA 92701.

Local forms: Orange County has one local form available for optional use, L-0317, for use in Name Change cases for children where the non-petitioning parent cannot be located for service. This form is available online at <http://www.occourts.org/forms/local/l317.pdf>

List of court-approved publications: The Orange County Court maintains a list of court-approved newspapers, L-1116, at <http://www.occourts.org/forms/local/l1116.pdf>

Get help at the court: The self-help centers at Orange County Court locations provide help with Name Change cases. For more information about locations and hours, visit <https://www.occourts.org/self-help/shselfhelp.html>

Search for a case online: To search for a case by name or case number, visit <https://apps.occourts.org/>

RIVERSIDE

General information: For information about Name Change cases in Riverside County, visit <https://www.riverside.courts.ca.gov/selfhelp/civil.shtml?trigger2=1#namechange>

Local forms: The Riverside County Court requires that one local form, RI-C1032, be submitted along with the other forms needed to start a Name Change case. This form is available online at <http://riverside.courts.ca.gov/localfrms/ri-ci032.pdf>

List of court-approved publications: The Riverside County Court maintains a list of court-approved newspapers at <https://evogov.s3.amazonaws.com/media/151/media/178590.pdf>

Get help at the court: Self-help centers in Riverside County can assist with Name Change cases at the Banning, Hemet, Corona, Riverside, and Murrieta courts. For information about the location and hours of the self-help centers, see http://www.riverside.courts.ca.gov/cal_rivcivilselfhelp.pdf?rev=2018.7

Search for a case online: To search for a case by name or case number, visit <https://www.riverside.courts.ca.gov/publicaccess.shtml>

SAN BERNARDINO

Where to file: In San Bernardino, Name Change cases can be filed in the Barstow, Big Bear, Joshua Tree, Needles, San Bernardino Justice Center, and Victorville courts. Use this link to determine where you can file your Name Change (Unlimited Civil) case: <http://www.sb-court.org/Divisions/Civil/WhereCanIFile.aspx>

List of court-approved publications: The San Bernardino County Court maintains a list of court-approved newspapers: <http://www.sb-court.org/Portals/0/Documents/PDF/General%20Information/SB%20General%20Circulation%20List.pdf>

Search for a case online: To search for a case by name or case number, visit <https://www.sb-court.org/Divisions/Civil/CaseInformationOnline.aspx>

CONTRA COSTA

General information: For an informational packet about Name Change cases in Contra Costa County, visit http://www.cc-courts.org/forms/packets/NC100_Name_Change_Packet.pdf or <http://www.cc-courts.org/forms/forms.aspx?Tab=Packets>

Filing Instructions: New Name Change cases in Contra Costa County must be filed at the Martinez courthouse. Forms must be filed between 9:30am-11am Monday through Friday at the ex-parte calendar, held in Room 210 of the Wakefield Taylor Courthouse at 725 Court Street, Martinez. After appearing in Room 210, make two sets of copies (three copies if serving the other parent), and take the originals and copies to Room 103 to be filed and have a court date assigned. At the time of filing, you will need to show photo identification and proof of residency in Contra Costa County (e.g. recent utility or tax bill), and the birth certificate of any minor(s) requesting a name change. For additional information, call (925) 608-1000 at the Martinez courthouse.

List of court-approved publications: The Contra Costa County Court maintains a list of court-approved newspapers, which is available at the Martinez courthouse or at the self-help center.

Search for a case online: To search for a case by name or case number, visit <http://icms.cc-courts.org/tellme/>

SANTA CLARA

General information: For information about Name Change cases in Santa Clara County, visit http://www.scscourt.org/self_help/probate/namechange/namechange.shtml

Filing information: In Santa Clara County, Name Change cases are handled in the **Probate** Division, rather than the Civil Division.

Local forms: Santa Clara County requires one local form, PB-4010, *CLETS Background Information Form*, to be submitted along with the other forms needed to start a Name Change case. This form is available online at http://www.scscourt.org/forms_and_filing/forms/PB-4010.pdf

Court-approved publications: The Santa Clara County Court maintains a list of court-approved newspapers, PB-4000, at http://www.scscourt.org/forms_and_filing/forms/PB-4000.pdf

Get help at the court: The self-help center at the downtown San Jose location provides help with Name Change cases. For more information about locations and hours, visit http://www.scscourt.org/self_help/shcflfo.shtml

Search for a case online: To search for a case by name, visit <https://cmportal.scscourt.org/Portal/Home/Dashboard/29> To view documents using your case number, visit http://www.scscourt.org/self_help/probate/faqs/records.shtml

VENTURA

General information: For information about Name Change cases in Ventura County, visit <http://www.ventura.courts.ca.gov/form-packets.html>

Where to file: Name Change cases in Ventura county must be filed at the Ventura Courthouse

List of court-approved publications: The Ventura County self-help center maintains a list of court-approved newspapers, which is available at the self-help center.

SAN FRANCISCO

General information: For information about Name Change cases in San Francisco County, visit <https://www.sfsuperiorcourt.org/self-help/name-change>

Filing information: You will need to provide proof of residency within San Francisco County at the time of filing and on the day of the hearing.

Court-approved publications: The County of San Francisco maintains a list of court-approved newspapers at <https://sfgov.org/countyclerk/legally-adjudicated-newspapers>

Get help at the court: The self-help center in the San Francisco court locations offer help with Name Change cases. For more information, visit <https://www.sfsuperiorcourt.org/self-help>

Search for a case online: To search for a case by name or to view documents using your case number, visit <https://webapps.sftc.org/captcha/captcha.dll?referrer=https://webapps.sftc.org/ci/CaseInfo.dll?>

SACRAMENTO

General information: For information about Name Change cases in Sacramento County, visit <https://www.saccourt.ca.gov/civil/filing-instructions.aspx#name-change>

Where to file: In Sacramento County, Name Change cases are handled in the Civil Division. Cases must be filed at the Law and Motion Public Filing Counter located at the Hall of Justice Building, 813 6th Street, Room 212, Sacramento, 95814. Filings are accepted only Tuesday-Friday, 8:30am – 12pm.

Local forms: Check Sacramento County’s Name Change packet, available at <https://www.saccourt.ca.gov/civil/docs/cv-142n.pdf> for any local forms or instructions.

Court-approved publications: The Sacramento County Court maintains a list of court-approved newspapers, at <https://www.saccourt.ca.gov/general/docs/newspapers-general-circulation.pdf>

Get help at the court: The civil self-help center offers workshops for Name Change; more information is available <https://saclaw.org/law-101/name-change/>

SAN MATEO

Where to file: Name Change cases in San Mateo County can be filed in Redwood City at the Hall of Justice and Records, 400 County Center, Redwood City, CA.

Local forms: San Mateo County has one local form available for optional use, CV-66, *Form to Dispense with Notice to Other Parent*, for use in Name Change cases for children where the non-petitioning parent cannot be located for service. This form is available online at http://www.sanmateocourt.org/documents/forms_and_filing/CV-66.pdf

Court-approved publications: The San Mateo County Court maintains a list of court-approved newspapers at http://www.sanmateocourt.org/documents/forms_and_filing/PR-CV-13Newspaper-Listings.pdf

Search for a case online: To search for a case by name or view documents using your case number, visit http://www.sanmateocourt.org/online_services/online_case_access.php

FRESNO

General information: For information about Name Change cases in Fresno County, visit http://www.fresno.courts.ca.gov/_pdfs/Self-Help%20Packets/English%20versions/Change%20of%20Name%20Packet%20Eff.%209-1-18.pdf

Where to file: In Fresno County, cases should be filed on the fourth floor of the B.F. Sisk Courthouse, 1130 O. Street, Fresno, CA 93721, in the Unlimited Civil Department.

Court-approved publications: For a list of court-approved newspapers in Fresno County, see the last page of the forms packet available at http://www.fresno.courts.ca.gov/_pdfs/Self-Help%20Packets/English%20versions/Change%20of%20Name%20Packet%20Eff.%209-1-18.pdf

SAN JOAQUIN

Court-approved publications: The San Joaquin County Court maintains a list of court-approved newspapers at <https://www.sjcourts.org/wp-content/uploads/List-of-SJC-Newspapers.pdf>

PLACER

General information: For information about Name Change cases in Placer County, visit http://www.placer.courts.ca.gov/civil/civil_name-change.html

Filing information: At the time of filing, you will need to provide the court with your driver's license number, social security number, and any other names you use (AKAs), to enable the court to conduct a background check.

Local forms: Placer County requires one local form to be submitted along with the other forms needed to start a Name Change case. This form is available online at http://www.placer.courts.ca.gov/forms/Addendum_Name_Change_Packet-2016.pdf

Court-approved publications: The Placer County Court maintains a list of court-approved newspapers, at http://www.placer.courts.ca.gov/forms/Publication_for_Placer_County.pdf

Get help at the court: The self-help center at the Gibson courthouse in Roseville offers help with Name Change cases, by appointment only. You can schedule an appointment online at <http://www.placer.courts.ca.gov/online-appointments.html>

YOLO

Court-approved publications: Three Yolo County court-approved newspapers are the Daily Democrat (www.dailydemocrat.com), the Davis Enterprise (www.davisenterprise.com), and the West Sacramento News-Ledger (www.westsac.com/news-ledger).

SONOMA

Filing information: At the time of filing, in addition to the forms needed to start a case, include a check in the amount of \$25 for each certified copy of the decree you require, along with two self-addressed stamped envelopes.

Other relevant information: You must file the Proof of Publication with the Clerk's Office 7 days prior to the court date assigned and listed on your *Order to Show Cause* form. On the day before your court hearing, call the Tentative Ruling line at (707) 521-6881 after 11:00am. You will hear recorded information regarding your case. If the judge has approved your petition for change of name, you will not need to appear in court. You may also check the Court's website for the tentative ruling at <http://sonoma.courts.ca.gov/onlineservices/tentativerulings#trip>

Court-approved publications: The following is a list of court-approved newspapers for Sonoma County:

- The Cloverdale Reveille (707) 894-3339
- The Community Voice (707) 584-2222
- The Healdsburg Tribune (707) 433-4451
- Petaluma Argus-Courier (707) 762-4541
- The Press Democrat (707) 546-2020
- The Sonoma Index Tribune (707) 938-2111
- Sonoma West Times & News (707) 823-7845
- The Times (707) 838-9211

SANTA CRUZ

Where to file: Name Change cases must be filed at the Santa Cruz courthouse.

Court-approved publications: For a list of court-approved newspapers in Santa Cruz County, see www.santacruzcourt.org/divisions/civil under FAQ 7.

Get help at the court: The self-help center in the Watsonville courthouse offers help with Name Change cases (though the forms must be filed at the Santa Cruz courthouse).

MONTEREY

Local forms: Monterey County requires one local form to be submitted along with the other forms needed to start a Name Change case. This form is available online at <http://www.monterey.courts.ca.gov/Documents/Forms/Local%20Court%20Forms/CI-140.pdf>

Court-approved publications: The Monterey County Court maintains a list of court-approved newspapers, at <http://www.monterey.courts.ca.gov/Documents/Civil/Adjudicated-Newspapers.pdf>

MARIN

Filing information: Filing instructions for Name Change cases in Monterey County are available at <http://www.marincourt.org/data/localforms/CV078W-CHANGEOFNAME-WEBSITE11-15.pdf>

Court-approved publications: The Marin County Court maintains a list of court-approved newspapers, at <http://www.marincourt.org/data/localforms/CV080nPR028-LegallyAdjudicatedNewspapersn4-16n.pdf>

SAN LUIS OBISPO

General information: For information about Name Change cases in San Luis Obispo County, visit www.slo.courts.ca.gov/sh/selfhelp-namechange.htm

Where to file: You should file at the San Luis Obispo Courthouse, located at 1035 Palm St., Room 385 San Luis Obispo, CA 93408 if you live in the following cities: San Luis Obispo, Avila Beach, Grover Beach, Arroyo Grande, Nipomo, Oceano, Pismo Beach, Cayucos, Los Osos or Morro Bay.

You should use the Paso Robles Courthouse, located at 901 Park St., Paso Robles, CA 93446, if you live in the following cities: Paso Robles, Atascadero, Cambria, Santa Margarita and Templeton.

Court-approved publications: Court-approved newspapers for San Luis Obispo County include New Times (805) 546-8208 and The Tribune (805) 781-7800.

EI DORADO

Local forms: El Dorado County requires one local form to be submitted along with the other forms needed to start a Name Change case. If you are filing at the West Slope or Placerville locations, file the C-2 form, available at <http://www.eldoradocourt.org/files/LocalForms/Civil/C-2ConfidentialInfoNameChangeWestSlope.pdf> If you are filing in South Lake Tahoe, file the C-2S form, available at <http://www.eldoradocourt.org/files/LocalForms/Civil/C-2SConfidentialInfoNameChangeSLT.pdf>

YUBA

General information: For information about Name Change cases in Yuba County, visit <http://www.yubacourts.org/sites/default/files/pdfs/Checklist/FormsListNameChange.pdf>

Court-approved publications: Court-approved newspapers for Yuba County include Appeal Democrat and Territorial Dispatch.

MADERA

General information: For information about Name Change cases in Madera County, visit <http://www.yubacourts.org/sites/default/files/pdfs/Checklist/FormsListNameChange.pdf>

Court-approved publications: The following is a list of court-approved newspapers for Yuba County:

- Appeal Democrat
- Territorial Dispatch

HUMBOLDT

General information: For information about Name Change cases in Humboldt County, visit <https://www.humboldt.courts.ca.gov/sh/namechanges.htm>

Get help at the court: For information about self-help services in Humboldt County, visit <http://www.humboldt.courts.ca.gov/files/SelfHelp-Workshop-Schedule.pdf> You may be able to schedule an appointment by calling (707) 445-7256 or emailing court.selfhelp@humboldtcourt.ca.gov

MENDOCINO

General information: For information about Name Change cases in Mendocino County, visit http://www.mendocino.courts.ca.gov/forms_and_filing/packets/j.asp

Local forms: Mendocino County requires one local form, MNC-110, to be submitted along with the other forms needed to start a Name Change case. This form is available online at http://www.mendocino.courts.ca.gov/forms_and_filing/forms/MNC-110.pdf

Court-approved publications: The following is a list of court-approved newspapers for Mendocino County:

- Anderson Valley Advertiser (707) 895-3016
- Mendocino Beacon (707) 964-5642
- Fort Bragg Advocate (707) 964-5642
- Willits News (707) 459-4643
- Ukiah Daily Journal (707) 468-3500

Get help at the court: For information about self-help services in Mendocino County, visit http://www.mendocino.courts.ca.gov/forms_and_filing/forms/SHLA.pdf

For more information about this document, contact:

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Live Chat Toolkit

Section 3

Shortcuts and Scripted Answers

Name Change in California Live Chat Shortcuts and Scripted Answers

June 2019

This document is based on results of the Judicial Council's Live Chat pilot project, which took place between October 2018 and March 2019. This toolkit has not been reviewed or approved by the Judicial Council but is made available as a best practices document to organizations interested in pursuing local Live Chat projects.

Live Chat Content Shortcuts: Name Change in California

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INTRODUCTION

This document includes content for use by Live Chat Agents providing legal information to litigants seeking information about Name Change cases on the California Court's Self-Help Center website. As agents will be interacting in real time with users, the content below is a guide and is provided for ease in answering frequently asked questions.

Content is organized into four general types of scripted answers:

1. Pre-Chat Disclaimers and Information
2. Conversational Chats
3. Post-Chat Survey Questions
4. Content Chats

Each scripted answer is preceded by a short word or phrase – a shortcut – that can be programmed in to the Live Chat software for ease in responding quickly to users' questions. In addition to simple scripts, you can also script questions with a list of forced choice answers for users to choose from.

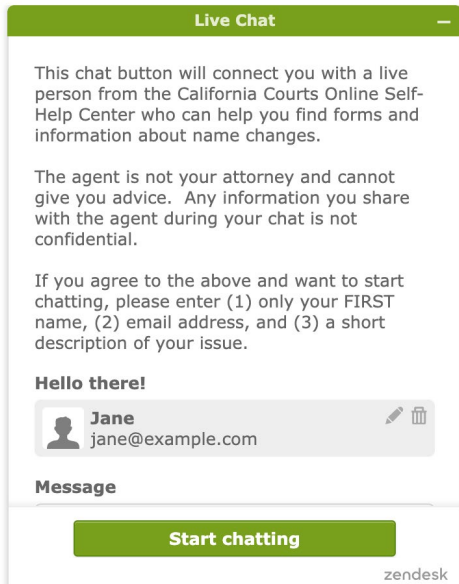
You may find that some of the scripted answers below are not relevant to your program. In addition to the content below, additional scripted answers may be developed with information about your local county and courthouse(s), based on the needs of your users. The shortcuts are suggestions and should be customized for use in your program.

In many cases, you may need to use multiple shortcuts in rapid succession to get information across to the user. For example, you may need to provide an initial statement to the user about the scope of your services (providing legal information only), ask what type of case they need help with, and also ask whether they plan to file in your county or somewhere else. These shortcuts are deliberately broken up into short segments to allow for customizability based on the information offered by the user.

Note: If you plan to direct users to other websites using hyperlinks in your shortcuts, be sure NOT to follow the link with a period, which will disable the link.

PRE-CHAT INFORMATION AND DISCLAIMERS

The Live Chat software you choose should allow you to customize the chat window that appears on the user's screen when the Chat program is live (you can also customize your hours of operation). For example, the following language might appear in the chat window if a user clicks on it to ask a question:



This chat button will connect you with a live person from the California Courts Online Self-Help Center who can help you find forms and information about name changes.

The agent is not your attorney and cannot give you advice. Any information you share with the agent during your chat is not confidential.

If you agree to the above and want to start chatting, please enter (1) only your FIRST name, (2) email address, and (3) a short description of your issue.

The user may then type in a name, any additional information you request (such as an email address), and a message or question.

Your Live Chat software should also allow you to send an automatic chat message to each user, prior to a Chat Agent responding to the user directly. For example:

An agent will be right with you. While you wait, here is some information that may be helpful during your chat session. Clicking on the up arrow in the upper right corner of your chat box allows you to make the chat box larger. You will be able to get an email copy of your chat session by clicking on the word "Options" in the lower left corner of your chat box (desktop users) or by clicking on the Menu icon in the upper right corner of your chat box (mobile users).

Additional pre-chat scripts include:

Disclaimer *Hello! Let me see if I can help to answer your question. Before I do, I need to tell you about how I can and cannot help. I am not your attorney and cannot give you legal advice or tell you what you should do about your legal problem. The court cannot provide you with an attorney, and nothing you tell me is confidential. To protect your information, please do not share any personal or case specific information, like names, phone numbers, or case numbers. Is all of that okay with you?*

[button] Yes

[button] No

/disclaimer2 *Great! So I can give you information that is helpful in your situation, I need to ask a couple of questions before we begin.*

/case type *What kind of case do you have questions about?*

[button] Name Change for an adult

[button] Name Change for a minor child

[button] other

/what county *What county are you considering filing your case in?*

/county links *There may be forms and information on your county's website that can help you. Please wait a moment while I find a link to your county's website.*

/disclaimer no *If you want legal advice about your case, you may be able to find an attorney to help you. You may qualify for free legal services if you have low or moderate income. You may contact your local Lawyer Referral Service to help you find a private attorney who will charge a fee, or you may also find names of attorneys by searching online. You may need to call several attorneys before you find one who can help you.*

CONVERSATIONAL CHATS

Short, conversational scripts can help users who are experiencing short delays during their chat. A Chat Agent may be searching for information, speaking with another agent or expert, or assisting multiple users simultaneously.

/wait *Please wait while I look for that information.*

/wait2 *Let me find information about help you can receive at the court.*

/hold *I would like to help answer your questions, but I have several people in line ahead of you. Please be patient as I help them, and I will get back to you as soon as I can.*

/instructions *Clicking on the up arrow in the upper right corner of your chat box allows you to make the chat box larger. You will be able to get an email copy of your chat session by clicking on the word "Options" in the lower left corner of your chat box.*

/don't know *I'm sorry, I was not able to find the information you are looking for. Can I help direct you to your local Self-Help Center? Though they cannot give you legal advice, you may be able to speak with someone to get more information about your problem. You can find your local Self-Help Center by visiting <http://www.courts.ca.gov/selfhelp-selfhelpcenters.htm>*

/askyourcourt *Each court has different procedures; you may want to consult your local court clerk at the time of filing or speak with someone at your local self-help center regarding this issue.*

/self help *You can find information about your county's self-help center by visiting <http://www.courts.ca.gov/selfhelp-selfhelpcenters.htm>*

/transfer *I'm sorry, I was not able to find the information you are looking for. Can I direct you to another agent who may be able to answer your question?*

/advice *As you read prior to the beginning of our session, I am only able to provide information about the name change process. So, I can tell you how to do something, but not what is the best thing to do for you. If you need advice about what you should do with a legal case, you may contact an attorney. Would you like to continue with our session, or would you like me to give you links to help you find an attorney who can give you advice specific to your case?*

/911 *If you are in immediate danger, call 911.*

/angry *I'm sorry that you are frustrated. Unfortunately, I can only give legal information about the Name Change process at this time. I can continue to try to help answer your questions if you'd like. If you would like to speak with someone in person about your questions, I can help you locate your nearest Self-Help Center.*

/manager I'm sorry I was not able to help you to your satisfaction today. I am the only person available right now for this LiveChat session, but you will be able to leave detailed feedback once our session is over.

/get help If you would like to get legal information from a court in your county, you can visit <http://www.courts.ca.gov/find-my-court.htm>. If you would like to get legal advice from an attorney, you can get help finding one at <http://www.calbar.ca.gov/Public/Need-Legal-Help/Lawyer-Referral-Service> Legal aid providers may offer free services to low- and moderate-income persons; you can find your local legal aid provider(s) here: <http://www.calbar.ca.gov/Public/Need-Legal-Help/Free-Legal-Help>

/anything else Do you have any other questions I can help you with?

/idle I'm not sure if you would still like to chat. I will be available today until 12pm, and you can ask questions using this chat window until then. LiveChat is available Mondays, Wednesdays, and Thursdays from 9am – 12pm. Thank you for chatting!

/bye Thank you for chatting with us today. Have we resolved your question?

[button] Yes

[button] No

POST-CHAT SURVEY QUESTIONS

You would like to ask users to evaluate your service, you may be able to use tools available through your Live Chat software. You may also choose to provide users with a link to a web-based survey tool (such as Survey Monkey or Qualtrics), ask permission to follow up with them directly, or provide other options for feedback. Please note that a user may choose to end the session before a Chat Agent is able to offer a feedback option using one of these shortcuts.

/end info *Before you leave, I wanted to remind you that any information you provided during this LiveChat session is not confidential. Any information offered by your LiveChat agent should not be considered legal advice. If you would like a copy of this chat session emailed to you, please click on the word "Options" in the lower left corner of your chat box. We hope you will help us improve our services by choosing a 'thumbs up' or 'thumbs down' rating (you can also add optional comments). Thank you for using LiveChat!*

/followup *Would it be okay if we email you in a few weeks to ask questions about your experience completing and filing your court forms?*

/good rating *Thank you for your feedback!*

/bad rating *Please help us improve by letting us know more about your experience:*

[button] My issue was not resolved

[button] Agent took too long

[button] Agent knowledge unsatisfactory

[button] Agent gave me website links that don't work

[button] Other

CONTENT CHATS AND LINKS

The shortcuts and scripted answers below were developed for Name Change cases in California, and the information was current as of March 2019.

IS NAME CHANGE THE RIGHT CASE FOR ME?

Do I need to do this to change my name after a divorce?

Idisso *Open Divorce Case: If you want to change your name back to your birth name or your legal name before getting married and you have an OPEN divorce case in California (you do not have a final judgment), you can ask the court to restore your birth or former name when your final judgment or divorce decree is entered. More information about completing your divorce case is available here: <http://www.courts.ca.gov/1035.htm>*

Completed Divorce Case: If you want to change your name back to your birth name or your legal name before getting married and you have a COMPLETED divorce case in California, you can request a name change using your divorce case number and Form FL-395. You can find the form here: <http://www.courts.ca.gov/documents/fl395.pdf>

If you want to change your name to something other than your birth name or your former name, you will need to file a Name Change case.

I'm getting married and want to change my name.

/marriage license *If you are getting married, you may not have to go to court. You may want to review the Name Equality Act to see the options you and your partner have for changing your name on your marriage license: <https://www.cdph.ca.gov/Programs/CHSI/CDPH%20Document%20Library/CHSI-The-Name-Equality-Actof2007-4-2017.pdf#search=name%20equality%20act>*

I got married and need to change my legal documents to my married name.

/married *If you recently got married, you may not have to go to court. You can contact your local DMV office and your local Social Security office and ask if they can change your last name if you are able to show your marriage license or certificate.*

You can find your local DMV office by using this link:

https://www.dmv.ca.gov/portal/dmv/detail/fo/offices/toc_fo A checklist of what you'll need to change your name with the DMV is here:
https://www.dmv.ca.gov/portal/dmv/?1dmy&urile=wcm:path:/dmv_content_en/dmv/dl/checklists/namechg

You can find your local Social Security office by using this link:

<https://secure.ssa.gov/ICON/msg012View.do> The documents you'll need to bring to the Social Security Office are listed at <https://faq.ssa.gov/en-us/Topic/article/KA-01981>

I need to get copies of my CA marriage certificate.

/marriage certificate For more information about getting a copy of your California marriage certificate, visit <https://www.cdph.ca.gov/Programs/CHSI/Pages/Vital-Records-Obtaining-Certified-Copies-of-Marriage--Divorce-Records.aspx> and see this pamphlet, which also includes the application to request copies and contact information for local county clerks.

I need to correct my CA marriage certificate.

/correct marriage certificate Information about correcting or amending a California marriage record is available at <https://www.cdph.ca.gov/Programs/CHSI/CDPH%20Document%20Library/CHSI-Affidavit-to-Amend-Marriage-2017.pdf>

How do I change my child's birth certificate?

/birth certificate If you want to correct spelling errors on a birth certificate, you can get more information about the process, forms, and fees in the pamphlet found at [https://www.cdph.ca.gov/Programs/CHSI/CDPH%20Document%20Library/ADA_Affidavit%20to%20Amend%20Birth%20\(01-18\).pdf](https://www.cdph.ca.gov/Programs/CHSI/CDPH%20Document%20Library/ADA_Affidavit%20to%20Amend%20Birth%20(01-18).pdf)

To add or change a parent's name on a child's birth certificate (other than spelling errors), you will need to obtain a court order. You may need to file a family law case; for more information, you may consult <http://www.courts.ca.gov/selfhelp-parentage.htm>

My new partner wants to change my child's last name to their own last name.

/change child's last name If you only want to change your child's last name, you can file a Name Change case. You will have to let the other parent know about the request, and the other parent will have a chance to object. Even if the court grants your request and the child's name is legally changed, a Name Change case cannot change who the child's legal parents are.

If you want your new partner to become the child's legal parent – someone who has the right to custody and the responsibility to support the child – you can start an adoption or a family law case. You may be able to change your child's last name as part of these cases without doing a separate Name Change case. For more information, see <http://www.courts.ca.gov/selfhelp-parentage.htm> and <http://www.courts.ca.gov/selfhelp-adoption.htm>

Do I need to amend my birth certificate to get a Real ID card?

/realid For more information about the documents you need to apply for a Real ID compliant California Driver's License or Identification Card, visit <https://www.dmv.ca.gov/portal/dmv/detail/realid/checklist>

Can't I just start using the new name I want to use without going to court?

***Usage** You may already have been using a different name than the one listed on your legal identity documents in everyday life. In most cases, in order to have your name changed on your legal identity documents, such as a driver's license or passport - even if you want to change it to the name you have already been using - you need to legally change your name through a court order.*

Can I change my name if I am becoming a U.S. Citizen?

***Citizenship** You may be able to change your name during the citizenship process; you can find more information at <https://www.uscis.gov/sites/default/files/files/article/M-476.pdf> If you have already become a U.S. Citizen and want to change your name, you will need to file a Name Change case.*

I was incarcerated or am now on probation/parole. Can I change my name?

***Incarcerated** A person in county jail or under the supervision of the Department of Corrections and Rehabilitation (in state prison or on parole) can file a petition to change their name but must serve the petition on a government agency and file a copy of the Proof of Service with the court. For more information about this requirement, see item 9 on the NC-100-INFO form: <https://www.courts.ca.gov/documents/nc100info.pdf>*

ADULT NAME CHANGES

What is the process to change my name?

/process adult *The steps to complete a Name Change case for an adult are listed at <http://www.courts.ca.gov/22489.htm> You can click on the plus signs for more information about each step. I would be happy to answer questions about the process or forms.*

Do I need an attorney?

/attorney *You are not required to have an attorney to ask for a name change. I will do my best to answer your questions and provide legal information. However, you may want to consult with an attorney for legal advice. This program does not provide legal advice and is not a substitute for the advice of an attorney. Would you like information about finding an attorney?*

How do I fill out forms online?

/help forms *I'll be happy to help you with that. Whose name would you like to change?*

/change own name *Do you also want to change the name(s) of your minor child or children? Do you want to change your name to match your gender identity?*

/change child's name *Do you also want to change your own name?*

/start forms *I'll be happy to help with you with any questions you have about Name Change forms. An informational instruction sheet, NC-100-INFO, is available here: <http://www.courts.ca.gov/documents/nc100info.pdf>*

You can also use an online program, the Name Change Form Builder, that will ask you a series of questions and use your answers to help you fill out your court forms, which you can access here: <http://www.courts.ca.gov/35393.htm>. When you finish answering questions in this program, print your forms and take them to the court for filing.

If you want to download the forms you need and fill them out on your computer or print and complete them by hand, you can start at <http://www.courts.ca.gov/22489.htm>.

Depending on the county you plan to file in, there may also be additional local forms that the court requires.

If you have specific questions I can answer, just let me know.

How do I fill out the Petition (NC-100)?

/nc100 address *Address: The address you list on your forms should be one where you can receive mail in case the court sends you a notice. Once they are filed, these forms can be seen by any member of the public and any address listed will not be confidential. If you do not*

want anyone to know your address or cannot receive mail where you are, you can use a mailing address if it is safe to do so, like a P.O. Box or a friend or family member's address. If you are a victim of domestic violence or are in the State Witness Program, you may qualify for a confidential mailing address through the Safe At Home program.

Isafe at home If you would like to apply for a confidential mailing address, you can get more information about the Safe At Home program by visiting <http://www.sos.ca.gov/registries/safe-home/>

Inc100 court (also Iwhere to file) Court: The correct place to file a Name Change case is the county where you (or your child(ren) if this case is to change their name) live. I can help you find the address of the courthouse where you can file your case if you'd like.

Inc100 name Name of Petitioner: Only your name should go here. It is important that you list your current legal name here exactly as it appears on your legal identity documents. If you have legal documents using different names, even if they are only slightly different, you can list them all here. For example, someone might list, "Patricia Smith AKA Patty Smith." AKA stands for "also known as." It is important that the name you list here be listed exactly the same way on all the forms you complete.

How do I fill out the Attachment (NC-110)?

Inc110 You will need to fill out one of these forms for each person whose name you want to change.

Reason: Here you can list the reason why you are requesting a name change. If you need more space, you can write "See Attachment 7(c)" here, and use form MC-025 to write your explanation. Be sure to list "Attachment 7(c)" at the top of the form. You can find MC-025 at <http://www.courts.ca.gov/documents/mc025.pdf>

How do I fill out the Notice of Hearing (NC-120)?

Inc120 Notice of Hearing: You should leave this section blank. When you file your documents at the courthouse, the clerk will fill this section in with the date, time, and location when you should come back to court for your hearing.

3a.: Here you should fill in the newspaper where you plan to publish your Order to Show Cause. You have to publish in a court-approved newspaper; your county may have several options for you to choose from, and they may charge different fees. It is important that you be sure you want to publish in the newspaper you list here, because once your forms are filed you must use only that newspaper.

How do I fill out the Fee Waiver (FW-001)?

Ifw001 FW-001 states that if you get one of the benefits listed on the form, you do not have to provide additional information about your income on page 2. The FW-001-INFO states that you

may have to show the court proof that you receive this benefit. FW-001 is available here, <https://www.courts.ca.gov/documents/fw001.pdf>, and FW-001-INFO is available here <https://www.courts.ca.gov/documents/fw001info.pdf>.

The FW-001 states that if you do not receive one of the benefits listed on the form, you need to provide additional information about your income on page 2.

If you need help filling out the forms to ask for a fee waiver, you can review instructions at <http://www.courts.ca.gov/documents/fw001instruct.pdf>. You can also watch a video presentation at <http://www.cc-courts.org/video.aspx?File=FW-001> (you will need to have Flash enabled). If you would like to get help in person, you can visit your court's Self-Help Center.

What is publication?

/publication The law requires that, in most cases, people who want to legally change their name must publish a legal notice in a court-approved newspaper. This must be done at least once per week for four weeks in a row. Some exceptions to this include a name change to match gender identity and some domestic violence situations.

Where do I publish?

/list publications Some counties maintain a list of court-approved newspapers where you can publish your documents. Please give me a moment to see if I have a list of approved publications for your county.

(if no list exists) **/no list** I cannot locate a list of court-approved newspapers for your county at this time. You can contact newspapers in your area and ask if they can publish "legal notices." Only newspapers that have gotten a court order saying that they are a "newspaper of general circulation" can publish legal notices.

Why do I have to publish?

/why publication The law requires that people who want to change their name legally must publish the court form showing that they are asking to change their name and listing the court hearing date. This is to help prevent fraud and to give others a chance to object. The legal requirement means that, except in certain cases, the court cannot issue a Name Change order unless the person requesting it has published the legal notice as required.

How much does it cost to publish?

/cost publication The cost to publish in a court-approved newspaper varies from paper to paper, but it is often anywhere from \$50 to \$500. You can contact newspapers approved by your county to see what exactly they charge and which would be a good fit for your case.

How do I fill out the Decree Changing Name (NC-130)?

Inc130 Fill out just the top portion of the form, including your case number, name and address, court address, and the name(s) of the Petitioner(s) [people asking for a name change]. If your request for name change is granted, the court will complete the rest of this form and return it to you. This form, once completed and signed by a judge, will be your court order showing that your name is changed.

How do I fill out the Civil Cover Sheet (CM-010)?

Icm010 Case Name: You can list “Petition for Change of Name of:” and insert your name here, exactly as it appears on your other forms, including any AKAs (also known as).

Unlimited: Name Change cases are considered “Unlimited” cases.

Item 1: For a Petition for Name Change, the case type is a “Miscellaneous Civil Petition,” and the box next to “Other petition (not specified above)” should be checked, and you should type or write in “Petition for Name Change” underneath.

Item 2: Name Change cases are not considered complex.

Item 3: Requests for Name Change are considered non-monetary.

Item 4: A Name Change request is considered one (1) cause of action.

Item 5: Name Change cases are not class action suits.

Can someone to review my forms?

Ireview forms You may be able to ask the Self-Help Center or another provider in your county to review your forms to make sure they are complete. You can find the Self-Help Center in your county by visiting <http://www.courts.ca.gov/selfhelp-selfhelpcenters.htm> I may be able to give you more information about services in your county if you'd like.

How much does it cost to change my name?

Icost filing Right now, it costs \$435 to file a new case with the court. In most cases, you will also need to publish information about your case in a newspaper, and those costs may range from \$50 to \$500 depending on which newspaper you choose.

If you can't afford the court fee, you can ask the Court to allow you to file a case at no cost or reduced cost. See <http://www.courts.ca.gov/selfhelp-feewaiver.htm> for more information and to get the court forms to ask for a fee waiver.

If you need help filling out the forms to ask for a fee waiver, you can review instructions at <http://www.courts.ca.gov/documents/fw001instruct.pdf> You can also watch a video

presentation at <http://www.cc-courts.org/video.aspx?File=FW-001> (you will need to have Flash enabled). If you would like to get help in person, you can visit your court's Self-Help Center.

/fee waiver If you can't afford the court filing fee, you can ask the Court to allow you to file a case at no cost or reduced cost. See <http://www.courts.ca.gov/selfhelp-feewaiver.htm> for more information and to get the court forms to ask for a fee waiver. The court filing fee (or a fee waiver, if you have one) does not cover the cost of publishing in a newspaper, which you will have to pay directly to the newspaper.

If you need help filling out the forms to ask for a fee waiver, you can review instructions at <http://www.courts.ca.gov/documents/fw001instruct.pdf>. You can also watch a video presentation at <http://www.cc-courts.org/video.aspx?File=FW-001> (you will need to have Flash enabled). If you would like to get help in person, you can visit your court's Self-Help Center.

Where do I file?

/where to file The correct place to file a Name Change case is the county where you (or your child(ren) if this case is to change their name) live. I can help you find the address of the courthouse where you can file your case if you'd like.

You can find your closest courthouse by entering your city or zip code at <http://www.courts.ca.gov/find-my-court.htm> However, sometimes Name Change cases are only accepted at specific courthouses, even if they are not the ones closest to you. I can try to find more information about where you should file if you would like.

How do I file?

/how to file Once you have printed, reviewed, and signed all your forms, you should make at least two (2) copies of all your forms and take them to the courthouse. You will need to file them with the court clerk and pay the filing fee or file the forms to request a fee waiver. The clerk will keep the originals and stamp and return your copies to you. Your Order to Show Cause forms will have information about the date, time, and room number for your hearing.

You may be able to electronically file your documents with the court.

Can I file by mail?

/file by mail You can write to the clerk of the court at the courthouse where you plan to file and request that they file your documents. In your letter, include your contact information and the name of the form(s) you are filing. You should include a full set of the original forms to be filed, as well as at least one full set of copies, a self-addressed stamped envelope with sufficient postage, and the correct fee (or the forms to request a fee waiver). If you have questions about the fee or types of payment accepted, you may want to call the court before mailing your request.

If you can't afford the court filing fee, you can ask the Court to allow you to file a case at no cost or reduced cost. See <http://www.courts.ca.gov/selfhelp-feewaiver.htm> for more information and to get the court forms to ask for a fee waiver.

What happens after I file?

/after filing no kids When you file your forms at the court, they should issue you a case number and a date to come back to court for a hearing, also called an Order to Show Cause or OSC date, about 6-12 weeks from the date you file.

You must also publish a copy of your Order to Show Cause in a court-approved newspaper at least once per week for at least four (4) weeks in a row. Most newspapers charge a fee for this publication, which is not covered by your court fee (or a fee waiver). After the 4 weeks of publication are finished, the newspaper will provide you with a form saying you completed the publication, called a Proof of Publication. The newspaper may require you to pick up the completed Proof of Publication form from their office, they may mail it to you, or they may file the Proof of Publication with the court. If the newspaper does not file the form directly with the court, you should bring the original Proof of Publication form, along with one copy, with you to court and file it with the clerk at your hearing.

At the hearing, the judge may ask you questions about your request. If the judge grants your request to change your name, the judge will sign a Decree Changing Name. You may ask the clerk for a certified copy of the Decree (you may need to pay for certification if you do not have a fee waiver).

How long does the process take?

/time frame From the time you file your forms with the court, your case may take 6-12 weeks or longer to be completed. When you file your forms, the court will give you a hearing date, or OSC date, that is at least 6-12 weeks out to give you time to publish copies of your forms in the newspaper [and get the other parent served if your case is about a minor child].

Will I have to go to a hearing?

/do i have to go to the hearing In some counties, you may check online the day before the scheduled hearing to see the court's "tentative ruling" on your request. If the court says that the petition is "granted," you do not need to go to the hearing. You will still need to go pick up the signed order and obtain a certified version at the court.¹

I have experienced domestic violence.

/dv If you are in danger, you can call 911, the National Domestic Violence Hotline 1-800-799-SAFE (7223) [TTY 1-800-787-3224], or find your local domestic violence shelter at <http://www.cpedv.org/domestic-violence-organizations-california>

¹ [See Napa and Sacramento: <https://saclaw.org/video-library/name-change-workshop-2011/>]

I don't want to publish because I am changing my name to hide from an abuser.

Idv publication *If you (and your children) have a confidential address through the Safe At Home program to avoid domestic violence, if you or your child are a victim of sexual assault, or you are in the State Witness Program, you may ask that the court keep your address confidential and that you not have to publish your request in a newspaper. However, these confidentiality provisions do not change the requirements concerning service notice of a name change petition for a child on the child's parents or grandparents. You will generally not be able to change a child's name without notifying the other parent.*

More information is available in the court's information sheet NC-400-INFO, available at <http://www.courts.ca.gov/documents/nc400info.pdf>

If you don't have a confidential address through Safe at Home but you want one, you can call 1-877-322-5227 or visit www.sos.ca.gov/safeathome

I think my abuser will try to find me through the court case, even if I don't publish.

Iseal records *You can ask the court to protect your Name Change case by sealing the record so the case itself is not accessible by the public. If you want to request that your Name Change case be sealed, you may want to contact your local Self-Help Center or an attorney for assistance.*

How do I object to someone else's Name Change case?

Iobject *You can prepare a document listing your reasons as to why you object to the person changing their name. The document can be filed, using the same court case number of the other person's application for Name Change, at least two (2) business days before the case is scheduled for a hearing in front of a judge. You must also attend the hearing and tell the judge why you think the Name Change should not be granted.²*

What if the person who wants to change their name is a felon?

Iobjection crime *People who are in county jail or under the supervision of the California Department of Corrections (in prison or on parole) must give (serve) a copy of their request for a name change to the appropriate law enforcement agency, which will have a chance to object to that request. The courts will deny the requests of registered sex offenders, unless the court decides they will not endanger public safety.³*

² CCP 1227

³ CCP 1275-1279.6

ADULT GENDER CHANGES

How do I legally change my gender?

/gender change *This website has information and forms available to help with asking the court for a recognition of a gender change. You may want to start here to get more information:*
<http://www.courts.ca.gov/genderchange.htm>

You do not need a court ordered recognition of gender change your California driver's license, social security card, or U.S. passport. You also do not need a court order to have a new birth certificate issued reflecting a change of gender (for California birth records). If you were born outside of California and want to have your birth certificate amended, you may want to get a court ordered recognition of gender change to use in your efforts.

However, you DO need a court order for a change of name.

What happens after I file my forms for gender change (with or without name change)?

/after filing gender change *When you file your forms at the court, the clerk will keep your original documents and stamp your copy with a court case number.*

The Order to Show Cause form directs anyone who objects to your requests to file a written objection within six weeks of the date you file your papers. If no objection is received, the court will grant your requests without a hearing, and the judge will sign a final Decree with your court order(s). You may ask the clerk for a certified copy of the Decree (you may need to pay for certification if you do not have a fee waiver).

If an objection is filed and a hearing is set, the court will send you notice of the court date. Go to court on your court date and take your copy of the papers you filed with you.

If you are requesting recognition of a gender change or a name change to conform to your gender identity, you do not need to publish your request in a newspaper.

/publication gender change *If you are requesting recognition of a gender change or a name change to conform to your gender identity, you do not need to publish your request in a newspaper.*

How do I change my gender on my CA driver's license?

/gender change driver's license *You do not need a court ordered recognition of gender change your California driver's license. Beginning January 1, 2019, the DMV will allow you to select a gender category of female, male, or nonbinary for your California driver license or identification card. For more information, visit:*
https://www.dmv.ca.gov/portal/dmv/detail/dl/gender_id

Once I have a court order changing my gender, how do I change my driver's license/SS card?

/gender change documents *Once you have a certified copy of your final court order, you may take it to your local DMV office and your local Social Security office and ask that they change your gender and/or name. They may charge a fee to issue you new documents.*

You can find your local DMV office by using this link:

https://www.dmv.ca.gov/portal/dmv/detail/fo/offices/toc_fo You can find your local Social Security office by using this link: <https://secure.ssa.gov/ICON/msg012View.do>

The Transgender Law Center publishes a free online guide to changing California and Federal Identity documents, available at <https://transgenderlawcenter.org/resources/id/id-please>

Once I have a court order changing my gender, how do I change my birth certificate?

/birth certificate gender change *For a person born in California, you can request that the person's gender be changed on their birth certificate with or without a court order (though you do need a court order to change a name on a California birth certificate). To request a change of gender on a birth certificate WITHOUT a court order, see this pamphlet for more information:*

[https://www.cdph.ca.gov/Programs/CHSI/CDPH%20Document%20Library/ADA_Sex%20Change%20\(01-18\).pdf](https://www.cdph.ca.gov/Programs/CHSI/CDPH%20Document%20Library/ADA_Sex%20Change%20(01-18).pdf)

MINOR CHILD NAME CHANGES

How do I change my child's name?

***/custody** Are you and the child's other parent currently involved in a custody case? If so, you may be able to ask the judge in that case to change your child's name.*

Do I need the other parent's permission to change my child's name?

***/permission** You do not need permission from the other parent to file a name change case for a minor, but you must notify the other parent that you are seeking a name change and a parent who does not agree can make objections to the court.*

What is the process to change my child's name?

***/process minor** The steps to complete a Name Change case for a minor are listed at <http://www.courts.ca.gov/22584.htm> for parents who agree to file together, or at <http://www.courts.ca.gov/22583.htm> if only one parent is filing. You can click on the plus signs for more information about each step. I would be happy to answer questions about the process or forms.*

What if the other parent and I agree on changing our child's name?

***/parents agree** If you and other parent agree on changing your child's name, you can get the forms to start a name change case here: <http://www.courts.ca.gov/22584.htm> You can also use an online program that will ask you a series of questions and use your answers to help you fill out your court forms, which you can access here: <http://www.courts.ca.gov/35830.htm>*

You will both need to sign the forms, but you do not both need to appear to file the forms with the court. If the court schedules a hearing date to review your case, both of you should plan to attend.

What if the other parent and I don't agree on changing our child's name?

***/parents don't agree** If you are the only parent filing a request to change your child's name, whether the other parent agrees or not, you can start a name change case here: <http://www.courts.ca.gov/22583.htm> You can also use an online program that will ask you a series of questions and use your answers to help you fill out your court forms, which you can access here: <http://www.courts.ca.gov/35829.htm>*

You will need to have the other parent served with a copy of the court-stamped forms after they are filed. This means that someone over the age of 18, other than you, must personally hand a copy of the papers to the other parent and sign a Proof of Service form, NC-121. The other parent will have a chance to object to your request to change the child's name. If that happens, you will need to tell the judge why the name change is in the best interest of your child.

Do I need a separate case for each child/adult?

/file together *It depends. If you are filing a Name Change case for yourself and your minor child(ren), or just your minor child(ren), you should be able to file together under one case. If you and one or more adults would like to change your names together and file under one case, you should check with your local court or Self-Help Center to see if they will allow you to file together.*

What happens after I file?

/after filing with kids *When you file your forms at the court, they should issue you a case number and a date to come back to court for a hearing, also called an Order to Show Cause or OSC date, about 6-12 weeks from the date you file.*

After you get your OSC date, you will need to have a copy of the papers served on the child[ren]'s other parent at least 30 days before the OSC date. Service means that someone over the age of 18, other than you, must personally hand a copy of the papers to the other parent and sign a Proof of Service form, NC-121 <http://www.courts.ca.gov/documents/nc121.pdf> You should then bring this Proof of Service form with you on the OSC date to give to the judge.

You must also publish a copy of your Order to Show Cause in a court-approved newspaper at least once per week for at least four (4) weeks in a row. Most newspapers charge a fee for this publication, which is not covered by your court fee (or a fee waiver). Some newspapers may charge an additional fee if there is more than one person changing their name as part of your case. After the 4 weeks of publication are finished, the newspaper will provide you with a form saying you completed the publication, called a Proof of Publication. The newspaper may require you to pick up the completed Proof of Publication form from their office, they may mail it to you, or they may file the Proof of Publication with the court. If the newspaper does not file the form directly with the court, you should bring the original Proof of Publication form, along with one copy, with you to court and file it with the clerk at your hearing.

At the hearing, the judge may ask you questions about your request. If the judge grants your request to change your name, the judge will sign a Decree Changing Name. You may ask the clerk for a certified copy of the Decree (you may need to pay for certification if you do not have a fee waiver).

How do I serve the other parent?

/serve other parent *Once your completed forms are filed with the court and stamped with a case number and a hearing date, someone over the age of 18, other than you, must personally hand a copy of the papers to the other parent and sign a Proof of Service form, NC-121. You should bring the original Proof of Service form, along with one copy, with you to court and file it with the clerk at your hearing. You can find the Proof of Service form at <http://www.courts.ca.gov/documents/nc121.pdf>*

Why do I have to serve the other parent?

/legal parent *Legal parents are entitled to notice and must be served if you are requesting a name change for their minor child. A legal parent is a person who is listed on the child's birth certificate or who has been declared a parent by the court. A person may still be a legal parent, even if that person does not have physical or legal custody of the child.*

What if I don't know where other parent is for service?

/cant find other parent *You will have to ask the court for special permission to get the name change without letting the other parent know. To do this, the judge will ask you to look for the other parent, and you have to look as hard as possible, asking friends and family and looking up public records. Ask your court clerk or self-help center what the judge in your local court will want you to do to try to find the other parent.*

You will have to file papers explaining everything you tried to find your child's other parent, when you did it, and what the result was. The judge will take this very seriously (to make sure you tried everything possible) before changing your child's name without the other parent's knowledge.

If you or your child(ren) are a victim of domestic violence or sexual assault or are in the State Witness Program, you should talk to someone at your local Self-Help Center or an attorney about service requirements for your case.

What if the other parent objects to the Name Change?

/other parent objects *If the other parent does not agree to your proposed name change for the child, they can object by filing a written objection and/or coming to the OSC hearing listed on the Order to Show Cause. If the court does not think it is in the child's best interest to change their name, the court may deny your request to change their name.*

MINOR CHILD NAME CHANGES BY GUARDIAN

I am the child(ren)'s guardian – can I change their name?

Guardian *As the child(ren)'s legal guardian, you can ask the court to legally change their name. There are special forms that guardians can complete for this type of case, available here: <http://www.courts.ca.gov/22585.htm> You will need to be able to show the court that the child is likely to remain in your care until they become an adult, and not likely to be returned to the care of their parent(s). Your court may also require that you file your documents as a part of the existing guardianship case; you may want to check with your local court prior to filing.*

Who do I serve if I am the child(ren)'s guardian?

Guardian service *If you are the legal guardian of a child or children and are trying to legally change the child(ren)'s name, you will need to serve any living parent of the child(ren) at least 30 days before the OSC date. If either or both of the parents have died or cannot be located, you will also need to serve the child(ren)'s living grandparents.*

MINOR CHILD GENDER CHANGES

How do I change my child's gender?

/change child's gender A person under the age of 18 (a minor) can ask the court for an order recognizing a change of gender. The minor can request the change. An adult should also sign the request form, called a Petition. An informational instruction sheet, NC-500-INFO, is available at <http://www.courts.ca.gov/documents/nc500info.pdf>

To get the forms needed to have the court recognize a change of a child's gender, start here: <http://www.courts.ca.gov/41222.htm> To change a child's name and gender, start here: <http://www.courts.ca.gov/41224.htm>

Who is the Petitioner if I am filing a case to change my child's gender?

/petitioner minor gender change If you are filing a request to recognize a change of gender (with or without a name change) and you are under 18 or filing on behalf of someone who is under 18, the Petitioner on form NC-500 and all related forms should be the minor child AND an appropriate adult. For example, in the box near the top of NC-500 that says, "Petition of (name of each Petitioner):" you should list [Minor's current name] and [Adult's name].

Under item 1 on NC-500, you would list the minor's current name where requested, and check off the appropriate relationship of the adult who is filing with or for the child (like a parent or guardian), and list their name.

On page 2 of NC-500, the minor child would sign the declaration in the box near the top, and the adult would sign the form below as a petitioning parent/guardian.

AFTER COMPLETING CASE

How do I change my name after the judge grants my order?

Change documents Once you have a certified copy of your Decree Changing Name, you may take it to your local DMV office and your local Social Security office and ask that they change your legal name. They may charge a fee to issue you new documents.

You can find your local DMV office by using this link:

https://www.dmv.ca.gov/portal/dmv/detail/fo/offices/toc_fo You can find your local Social Security office by using this link: <https://secure.ssa.gov/ICON/msg012View.do>

How do I change my birth certificate to reflect my new name?

Birth certificate after order For a person born in California, once a name is legally changed through a court order, you can request that a birth certificate be changed to reflect the new name of the child and/or parent(s). For more information about how to change a birth certificate after a court ordered name change, you can read this pamphlet:

<https://www.cdph.ca.gov/Programs/CHSI/CDPH%20Document%20Library/Court%20order%20name%20change.pdf#search=court%20order%20name%20change>

How do I apply for a passport?

Passport Information about how to apply for or renew a U.S. Passport is available here:

<https://travel.state.gov/content/travel/en/passports/apply-renew-passport/how-to-apply.html>

How do I get a copy of my old order?

Get copies If you have already gotten a court order in your Name Change case and need a copy of your Decree, you will need to go back to the County courthouse where the case was originally filed. Using your court case number, you may request a copy of the Decree. If you do not have your case number, you may do an online search for the case number using your former name. Some courts may charge for this service. You may also be able to find your court case number by going to a courthouse in the county where you originally filed and checking with the clerk.

How do I get a copy of my old order by mail?

Copies by mail You can write to the clerk of the court at the courthouse where you originally filed to request copies. In your letter, include your contact information, the case number, the name of the form(s) you are requesting and date it was filed, a self-addressed stamped envelope, and the correct fee. If you have questions about the fee or types of payment accepted, you may want to call the court before mailing your request.

The cost for a certified (official) copy of a Decree Changing Name is \$0.50 per page plus a \$25 certification fee. If you can't afford the court filing fee, you can ask the Court to allow you to file

a case at no cost or reduced cost. See <http://www.courts.ca.gov/selfhelp-feewaiver.htm> for more information and to get the court forms to ask for a fee waiver.

Is there a charge for copies?

Cost of copies Most courts charge a fee for copies, but if you have or get a fee waiver, you do not have to pay those fees. You can request copies at the clerk's office where your case was originally filed.

If you can't afford the court fee, you can ask the Court to allow you to file a case at no cost or reduced cost. See <http://www.courts.ca.gov/selfhelp-feewaiver.htm> for more information and to get the court forms to ask for a fee waiver.

If you need help filling out the forms to ask for a fee waiver, you can review instructions at <http://www.courts.ca.gov/documents/fw001instruct.pdf> You can also watch a video presentation at <http://www.cc-courts.org/video.aspx?File=FW-001> (you will need to have Flash enabled). If you would like to get help in person, you can visit your court's Self-Help Center.

Is there a charge for certification?

Certification cost The cost for a certified (official) copy of a Decree Changing Name is \$0.50 per page plus a \$25 certification fee. If you can't afford the court filing fee, you can ask the Court to allow you to file a case at no cost or reduced cost. See <http://www.courts.ca.gov/selfhelp-feewaiver.htm> for more information and to get the court forms to ask for a fee waiver.

How do I get a copy of my name change (part of the naturalization process)?

Naturalization If you changed your legal name as part of the naturalization process, your records are maintained by the US Citizenship and Immigration Services. To request a copy of your name change document, please contact USCIS directly at <https://www.uscis.gov/about-us/contact-us>

Is it safe to go to a courthouse?

Court safety Courthouses are public buildings where anyone may enter. You must make the decision whether you feel it is safe to go to your local courthouse.

SAFETY

I'm in danger now.

***911** If you are in immediate danger, call 911.*

Is it safe to go to a courthouse?

***Court safety** Courthouses are public buildings where anyone may enter. You must make the decision whether you feel it is safe to go to your local courthouse.*

I don't feel safe (non-emergency)?

***safety** Are you safe? Do you need information about getting a restraining order or other legal help?*

I am thinking about harming myself.

***suicide** You are not alone. You can contact the National Suicide Prevention Lifeline anytime at 1-800-273-8255 or <https://suicidepreventionlifeline.org> If you're not sure you can keep yourself safe, please call 911, go to an emergency room, or contact your doctor. Please take care.*

I am thinking about hurting someone else.

***danger** If you believe you are a danger to yourself or to others, please call 911. We cannot assist you through LiveChat.*

I want to change my name so I can commit a fraud.

***fraud** It is a crime to use the Name Change process to commit fraud. We cannot assist you.
[end chat]*

PRIVACY

Can you please explain your privacy policy?

/privacy Please see the California Courts Privacy Statement at this link: <http://www.courts.ca.gov/11530.htm?rdeLocaleAttr=en> as well as our Terms of Use, which covers linking and third parties at this link: <http://www.courts.ca.gov/11529.htm> Our Live Chat services are provided by ZenDesk, which publishes privacy and cookie policies here: <https://www.zendesk.com/company/customers-partners/privacy-policy/>

I want all of the information about my chat sent to me.

/send my chats We retain chats for two weeks. Let me check on whether we still have your chat history.

I want you to delete all of the information I provided in my chat.

/delete my chats Sure, let me check the system for any chat history. We only retain chats for two weeks so your information may already have been deleted.

Live Chat Toolkit

Section 4

Sample Data Templates

Sample Data Summary

Courts	# of chats
Los Angeles	1
San Diego	1
Alameda	1
Orange	1
San Bernardino	0
Riverside	0
Contra Costa	0
Santa Clara	1
Ventura	0
San Francisco	0
Out of State	0
Fresno	0
Santa Barbara	0
San Mateo	0
Sacramento	0
San Joaquin	0
Monterey	0
Merced	0
Didn't state	0
El Dorado	0
Marin	0
Santa Cruz	0
Sierra	0
Stanislaus	0
Tulare	0
Amador	0
Butte	0
Kern	0
Madera	0
San Luis Obispo	0
Solano	0
Sonoma	0
Sutter	0
Napa	0
Alpine	0
Calaveras	0
Colusa	0
Del Norte	0
Glenn	0
Humboldt	0
Imperial	0
Inyo	0
Kings	0
Lake	0
Lassen	0
Mariposa	0
Mendocino	0
Modoc	0
Mono	0
Nevada	0
Placer	0
Plumas	0
San Benito	0
Shasta	0
Siskiyou	0
Tehama	0
Trinity	0
Tuolumne	0
Yolo	0
Yuba	0
Total Chats	5

Name change is for:	# of chats
Self	2
Child	1
Spouse	1
Family Unit	0
Parent	1
Sibling	0
Other	0
TOTALS	5

I need to...*	# of chats
Understand the entire process	1
Change my name related to marriage	0
Change my married name (not divorcing)	0
Change my name related to divorce	0
Get local filing or hearing information	1
Get help filling out forms or form review	1
Change a child's name	0
Change name to conform to gender	1
Change SS card or passport	0
Change driver's license or Real ID issue	0
Change or correct birth certificate	0
Get a copy of my decree	1
Understand fees and fee waivers	0
Understand publication	0
Understand service of process	0
Get a copy of or fix my name change via citizenship	0
Change a name related to adoption	0
Other	0
TOTALS	5

Live Chat Sample Template for Data Collection

Date of Chat	Chatter ID#	Chatter First Name	Device	County	Primary Issue	Relationship of Person Who's Changing Name	Length of Chat (minutes)	Number of Msgs Exchanged	Rating	Ok to follow up	Comments	Agent ID	Shift Time	Shift Day	Transferred To:
06/03/19	060319SM2	Dan	Desktop	Orange	Get help filling out forms or form review	Parent	32	30	Good	Yes		Sofia	Evening	Mon	
06/03/19	060319SM1	Emily	Mobile	Santa Clara	Change name to conform to gender	Self	18	19	None	No		Sofia	Evening	Mon	
06/04/19	060419SM1	Cecilia	Mobile	Alameda	Get local filing or hearing information	Child	5	5	None	-		Sofia	Afternoon	Tues	
06/05/19	060519SM2	Alex	Desktop	Los Angeles	Understand the entire process	Spouse	10	12	Good	Yes		Sofia	Morning	Wed	
06/05/19	060519SM1	Barbara	Mobile	San Diego	Get a copy of my decree	Self	16	14	None	-		Sofia	Morning	Wed	

Live Chat Toolkit

Section 5

Links to Additional Resources

Live Chat Additional Resources

If you are considering developing a Live Chat program, there are a variety of additional resources available to support your efforts:

- ❖ LiveHelp Project Manager's Toolkit (Probono.net)
<https://www.probono.net/library/attachment.206438>
- ❖ Guidelines for the Operation of Self-Help Centers in California Trial Courts
https://www.courts.ca.gov/partners/documents/self_help_center_guidelines.pdf
- ❖ California Courts Self-Help Center
<https://www.courts.ca.gov/selfhelp.htm>
- ❖ California Courts Equal Access: Service Delivery Models
<https://www.courts.ca.gov/partners/58.htm>
- ❖ Courts Effectively Deliver Remote Self-Help Services
<https://www.ncsc.org/sitecore/content/microsites/trends/home/Monthly-Trends-Articles/2017/Courts-Effectively-Deliver-Remote-Self-Help-Services.aspx>