

**San Luis Obispo County MSAA Project –
Joint Transportation Provider & User Subcommittees Meeting
Tuesday, May 2, 2017 – RTA 1st Floor Conference Room
1:30 – 2:30 pm PDT
Call: 1-866-730-7512; Password: 236145#**

Committee Chair: Geoff Straw, SLO Regional Transit Authority (RTA)

AGENDA & Notes

1. Welcome and Introductions

Geoff Straw

- a. Geoff welcomed all in attendance to RTA.
- b. Attendees.
 - i. Geoff Straw and Omar McPherson, RTA; Mark Shaffer, Ride-On; Fred Monroe, consultant; Nicole Bennett, CenCal Health; Todd Allen, RouteMatch Software; Murat Omay, FTA; Patti Starr, CHC.

2. MSAA Project Update

Mark Shaffer

- a. Draft System Requirements – Received FTA comments.
 - i. Mark stated the FTA provided their draft System Requirements comments last week. Mark stated the comments will be reviewed and a revised draft System Requirements document will be prepared.
- b. High-Level System Design (the TMCC “how”) Deliverable – in progress.
 - i. Mark stated this deliverable is next to be prepared. The subcommittees are in process of working on elements to assist the preparation of the deliverable.
- c. CalACT Conference Presentation – comments.
 - i. Mark, Omar, and Todd presented at the CalACT Conference last week. Mark and Omar provided an overview of the discussion and attendee conversations held after the session.
- d. Technology Subcommittee Update (from this morning’s meeting) - *new*
 - i. Mark provided a review of Technology Subcommittee discussion from this morning, including a review of Kevin Chambers’, Ride Connection, comments about the open source “Clearinghouse” for providers that has been developed..
 - ii. The committee discussed the opportunity for customer access to services in real-time. Geoff stated that it is important the system know all Providers’ service availability in real-time.
 - iii. Geoff recommended implementing a mutual aid or inter-local agreement between the providers, starting with RTA and Ride-On, to ensure commitment in the project.

- iv. Fred was interested in learning from Todd what technology options may be available on the market today that addresses the TTT. Todd stated that he, Omar, and Mark heard from vendors at CalACT last week that similar technology to what the committee is discussing is being developed (no detailed locations were shared). Todd mentioned that RouteMatch is currently developing a similar Mobility platform and is partnering with Valley Metro in Phoenix, AZ, on the FTA's Mobility on Demand Sandbox ITS project to develop an integrated mobility and payment platform for their entire region. Valley Metro is planning to host the application and include all multimodal mobility options working in their region (i.e. transit, Lyft, bikeshare, others). Todd stated that his colleague, Teague Kirkpatrick, can provide the committee with greater details.

3. Customer Trip Request Process – Review and Discuss **Mark Shaffer**

- a. See Attachment A.
 - i. Geoff recommended including a fixed route trip planning option.

4. Customer Profile Information – Review and Discuss **Mark Shaffer**

- a. See Attachment B.
 - i. The subcommittee discussed the customer profile information from the draft System Requirements. The subcommittee recommended the following changes.
 1. Change “Telephone number” to “Primary Telephone Number.”
 2. Add new data elements: “Emergency Contact Name” and “Emergency Alternate Telephone Number.”
 3. Add: “Special Requests” and open field for customer data entry.
 4. For “Mobility Assistance Needs,” create a pull-down menu feature to allow selection of the following data elements: “wheelchair,” “walker,” “amigo,” “do not leave alone,” “attendant,” and any other items.
 5. For “Eligibility Status” create a pull-down menu feature to allow selection of the following data elements: “ADA,” “Veteran,” “MediCal,” and any other items.

5. Questions and Comments **Committee Members**

6. Next Steps **Mark Shaffer**

- a. System Requirements Deliverable - finalize per comments from FTA.
 - i. Mark stated the team will review comments from the FTA, create a revised draft System Requirements deliverable, and send to the FTA and subcommittees. Mark stated the subcommittees work on the portals, new TTT concept, and other items in the “processes”

document will be included in the revised draft System Requirements with changes highlighted in yellow.

- b. Continued work on High-Level System Design elements. Mark stated this work will occur in May and June.
- c. Next subcommittee meeting. Mark stated these meeting dates are TBD. Mark stated the next full Advisory Committee meeting will most likely occur in late June.

7. Closing Remarks

Geoff Straw

Attachment A:

Customer Trip Request Process: per TTT Functional Requirements, Working Processes, and Options – Draft v04 03.10.2017

Data Input

- 1.1 **Trip Reservations and Scheduling.** The system shall provide the following Trip Reservations and Scheduling services.
 - 1.1.1 Identify new or existing customer eligibility for DRT Provider services.
 - 1.1.2 New or existing customer may conduct trip search without logging into the TMCC.
 - 1.1.3 New or existing customer trips may only be requested for eligible services.
 - 1.1.4 New or existing customer may request a trip directly through the DRT Provider.
 - 1.1.5 New or existing customer to enter name, address, telephone number, requested pick-up date (next day and up to 7 days in advance for Runabout), origin, pick-up time, drop off time, destination, attendant required, number of guests (if any), number of service animals (if any), and trip duration time limits.
 - 1.1.6 Utilize existing customer profile information for prior selected trips to “auto-fill” the trip request information.
 - 1.1.7 Allow the new customer (not registered) the options to select veteran status and “65 years and older.”
 - 1.1.8 Allow the existing customer to insert their five most frequently traveled origins and destinations into their profile. System will record the history of destinations for the customer.
 - 1.1.9 Allow the existing customer’s five most frequently traveled origins and destinations through the T3 to “auto-fill” into their profile.
 - 1.1.10 Allow new or existing customer to be recognized by GPS-location for trip origination.
 - 1.1.11 Recognize landmark destination names.
 - 1.1.12 New or existing customer capability to enter one or multiple leg trip request.
 - 1.1.13 New or existing customer may request day of service or same day trips (same day trips are not available for Runabout).
 - 1.1.14 New or existing customers are capable of requesting reserving trips at least 14 days in advance (7 days for Runabout, other DRT Providers may require less days).

- 1.1.15 Provide lift-equipped vehicle availability and type options when scheduling a trip.
 - 1.1.15.1 New or existing customers to identify a personal care attendant necessary for the trip, identify possible guests, identify potential service animals and calculate their cost prior to requesting a trip.
 - 1.1.15.2 New or existing customer capability to search one or more trip requests by date and time of service.
 - 1.1.15.3 Provide an alert feature for duplicate trip requests.
 - 1.1.15.4 Submit existing customer trip requests to DRT Providers. New customers must register prior to requesting their chosen trip.
- 1.1.16 Enable telephone link and electronic chat options with the TMCC's "on duty" live Customer Service Representative (CSR) during trip request process.

Data Output

- 1.1 The system shall provide the following **Trip Reservations and Scheduling** services.
 - 1.1.1 DRT Providers shall respond to an existing customer trip customer trip request in one hour or less based on availability during regular business hours. Response times may be longer if trips are requested two or more days in advance of the ride.
 - 1.1.2 Provide trip escort and attendant cost prior to scheduling trip.
 - 1.1.3 Provide the new or existing customer with a list of available trip options, such as applicable provider name, seat availability, vehicle type, lift-equipped availability, travel time, and fare.
 - 1.1.4 Illustrate all DRT Providers' availability to pick-up the new or existing customer.
 - 1.1.5 DRT Providers that are not available for the trip shall be listed as unavailable and a gray highlighted be placed over the text.
 - 1.1.6 Request trips only for existing customers through the T3.
 - 1.1.7 New customers must register prior to selecting their chosen trip.
 - 1.1.8 Existing customer chooses preferred trip, fare, and DRT Provider.
 - 1.1.9 Existing customer must reconfirm or cancel the selected trip prior to completing the online trip scheduling service.
 - 1.1.10 Provide an alert feature for duplicate trips when requested.
 - 1.1.11 Selected customer trip request is submitted to the chosen DRT Provider for trip confirmation.
 - 1.1.12 DRT Provider confirms the existing customer's requested trip and fare.

- 1.1.13 DRT Provider sends the confirmed trip, fare, and cancellation policy information to the existing customer by e-mail or text (preference listed in their profile).
- 1.1.14 Provide the confirmed trip and fare information to the existing customer and sponsoring agency.
- 1.1.15 Existing customer denied a trip request will receive a message directly from the DRT Provider.
- 1.1.16 System will offer existing customer other trip options after receiving denied trip from DRT Provider.
- 1.1.17 Enable telephone link and electronic chat options with the TMCC's "on duty" live Customer Service Representative (CSR) during trip reservations and confirmation process.
- 1.1.18 Store and illustrate all existing customer trip history to existing customer.

Attachment B:

Customer Profile Information: per System Requirements: per TTT Functional Requirements, Working Processes, and Options – Draft v04 03.10.2017

Data Fields

First/Last Name	Address	Telephone number	Mobile phone number	Date of birth
Alternate contact name	Alternate contact telephone number	Gender	Veteran status	Mobility assistance needs
Eligibility status	Trip confirmation communication preference (e-mail, text)	Payment method for each DRT Provider		