| SECTION | DESCRIPTION | COMMENT |
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| **1** | **Dashboard and On-Going Monitoring** | |
| **1.01** | Dashboard reporting allowing quick review of both overall system performance as well as system performance for individual clients. | |
| **1.02** | Dashboard reporting allowing quick review system performance for individual clients to include frequency of rides used, cancelled and no-showed as well as on-time performance. | |
| **1.03** | Update the database when the ride arrives at both the pickup & dropout locations. | |
| **1.04** | Enable the Call Center to quickly respond to "Where's My Ride" calls | |
| **2** | **Ride Vendor Management** | |
| **2.01** | Ability to input and manage information on ride provider fleets including seating capacity by vehicle type. | |
| **2.02** | Ability to input and manage information on ride provider billing rates, whether by flat charges, mileage-based charges, hourly charges or a combination thereof, with allowances for deductions of fares. | |
| **2.03** | Ability to input and manage information on driver, maintenance technician and vehicle certifications including background checks, ASAE certifications, annual safety and emissions inspections and other certifications. | |
| **2.04** | Software fully meets the Transportation Provider Management requirements beginning on (specify the page or section). | |
| **3** | **Client File, Booking and Scheduling** | |
| **3.01** | Customer management capability including funding program eligibility, selection of funding programs for individual trips, favorite destinations file, notations regarding preferred entrances at each favorite destination, and notations regarding mobility devices and personal assistance requirements. | |
| **3.02** | Ability to display prior trips by this passenger and to select one of these trips as a template for a new trip as well as quickly access data for frequent pickup/drop-off locations. | |
| **3.03** | Schedule rides to a customizable on-time window of X (#) minutes early to Y (#) minutes late. | |
| **3.04** | Configure maximum travel times by trip purpose or funding source. | |

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| **3.05** | Ability to set eligibility for rides according to funding source appropriateness, available funds for fares, and quantity of trips per unit of time.  Display ineligibility due to suspension or need for recertification | |
| **3.06** | Estimation of travel time based upon use of both internet-based calculations and historical travel times for previous occurrences of that trip and Prohibition from booking a trip if that trip would overlap another trip booked by the client or allow less than one hour between trips (policy decision). | |
| **3.07** | Indicate on a trip by trip basis if a personal care attendant, service animal or companion will accompany the rider. | |
| **3.08** | Ability to store and display data that indicates a client should not be placed on a particular transportation provider's service, or that a particular transportation provider does not wish to transport this client. | |
| **3.09** | Assign customer trips to sedans, minivans and lift wheelchair vans based upon disability and granted reasonable accommodations. | |
| **3.09** | Ability to associate a ride with a valid transportation debit account and display the funds in that account. | |
| **3.10** | Automated and manual scheduling and trip-assignment of rides in advance and in real-time, both individually booked and for regularly recurring standing order rides.  Call Center staff require the ability to adjust schedules, especially for regularly recurring standing order rides. | See Blog 5 |
| **3.12** | Present one or more solutions for scheduling the requested ride in order of best to worst. | |
| **3.12** | Highlight and resolve duplicate customer trip and client file entries. | |
| **3.13** | Report demand-response trips that are regularly recurring for possible scheduling as standing order rides. | |
| **3.13** | Ability to highlight for a Scheduler's review multiple trips booked to arrive at or depart from the same address within 30 minutes. | |

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| **3.14** | Enable the Call Center to cancel subscription rides and to temporarily ban a user and the client Project Officer to permanently ban a user from booking future trips. The system will allow the client Project Officer to modify the service, including blocking holidays, changing service hours and days of service, changing the size of service zones, adding/removing/modifying stop locations, and adding in new vehicles. | |
| **3.15** | Designate trips that cannot be successfully scheduled interactively onto a vehicle tour, the ability to designate those trips for taxi dispatch, future scheduling and/or real-time dispatching. | See Blog 5 |
| **3.16** | Ability to book recurring (subscription) trips based on common days of week and time of day for pickup or delivery times and origin and destination, including identification of dates when trip pattern is not applicable. | See Blog 5 |
| **3.17** | Provide the Client Project Officer remote access to the scheduling system to enable monitoring of contract adherence and to download data and develop analytical reports. | |
| **3.18** | Software fully meets the Customer Management System Interface requirements with other functionalities in this procurement. | |
| **3.19** | Software fully meets the Reservations/Order Taking requirements beginning on (specify the page or section). | |
| **3.20** | Software fully meets the Ride Arrival Communications with Riders requirements beginning on (specify the page or section). | |
| **3.21** | Software fully meets the Scheduling requirements beginning on (specify the page or section). | |
| **4** | **Dispatch** | |
| **4.01** | Dispatching tools (hardware, software and communications) shall provide data communication between the Call Center reservation/scheduling functions with both the taxi-dispatch vendor's dispatch software and the dedicated transportation vendor's dispatch software. Global Positioning System (GPS) longitude and latitude data for vehicles dedicated to the program shall also be transmitted to both the dedicated vehicle vendor's dispatch center and to the Call Center. | |

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| **4.02** | Provide real-time, online interactive scheduling to accommodate and communicate rider cancellations; ride reassignments between vehicles or from taxi dispatch (prior to the ride cancellation window) to dedicated vehicles; and same-day ride assignments real-time. | |
| **4.03** | Electronic HIPAA-compliant secure transmission of trip manifests to the transportation vendors and transmission of operational data from the transportation vendors back to the Call Center software for processing. | |
| **4.04** | Software fully meets the Dispatching requirements beginning on (specify the page or section). | |
| **4.05** | Software fully meets the Interface to Mobile Devices in Vehicles Dedicated to requirements beginning on (specify the page or section). | |
| **5** | **Web-Based Tools** | |
| **5.01** | Transactional Data Specification for Demand-Responsive Transportation will enable transit providers, sponsoring agencies, and information/referral services to electronically share ride request data for efficient processing and service provision. Sample language for a scope of services is contained in Appendix G of TCRP Report 210 – see : http://www.trb.org/Main/Blurbs/179848.aspx.  A *validator software tool* that verifies data messages generated by a software system is found at the following URL: http://tcrp.demandtrans.com. | |
| **5.02** | Provision of a Section 508-compliant accessible website that allows users including those with screen-reading software to confirm the pickup time and addresses on a scheduled ride, cancel a trip, review user account information and change the user password. | |

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| 5.03 | Maintenance of a website feature to handle incoming emails with a customized pull-down menu to categorize the email by issue-type. Issue types could include: Safety; Vehicle Maintenance; Customer Service; On-Time Performance; Commendations; System Policies; and Job Inquiries. Each issue type should be associated with a targeted maximum response time. Each inquiry would note the caller or rider's name and contact information. This website would enable the call center to attach the comment to a vehicle or driver number, note the date that the issue occurred, as well as submission date, enable pertinent information to be added, and have a resolution box to discuss the investigation results and response back to the individual. | |
| 5.04 | Development of an app and web portal that allows riders to see the location of the assigned cab or dedicated vehicle and get updates on what time it is expected to arrive. | |
| 5.05 | Provide notification to riders when their ride is almost at their stop for boarding. The amount of time in advance the notification is sent should be able to be modified by the Call Center customized for each customer. Riders will be able to choose to get a call, email, or text message notification. | |
| 5.06 | Communicate alerts to riders traveling to or from a service site if that location is closed or must close early due to unforeseen circumstances. | |
| **6** | **Telephonics** | |
| 6.01 | Provide a phone system suitable to the use intended and sufficient to meet the requirements stated in this Scope of Work. | |
| 6.02 | Record all calls from the first ring until the caller ends the call and associate and retrieve incoming call recordings associated with trip reservations, alterations and cancellations, as well as outgoing call recordings. Recordings shall be indexed with ride reservations. | |
| 6.03 | Measure and report, on a monthly basis, phone system performance statistics to include the numbers of calls received, answered and abandoned; percent of calls answered and abandoned; and average call hold and processing time. | |
| 6.04 | Display a visual alert if a call is on hold longer than 4 minutes. | |

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| **6.05** | Use a conference call resource for real-time language translation. | |
| **6.06** | Software fully meets the Telephonic Capability requirements in this procurement (specify the page or section). | |
| **7.00** | **Reporting** | |
| **7.01** | Report operational and financial information required by the National Transit Database as well as by the client | |
| **7.02** | Monitoring of performance both system-wide and on an individual consumer basis to include data on On-Time Performance (as measured by tracking the vehicle arrival time at the designated pickup location for each trip); excessive ride times based on customizable standards as measured by the time the vehicle leaves the initial pickup location and the time the vehicle arrives at the destination location); excessive dwell times at locations by dedicated vehicles; and Passenger No-Shows. | |
| **7.03** | Software fully meets Cost-Allocation requirements beginning on (specify the page or section). | See blogs 3 & 4 |
| **7.04** | Software fully meets documentation requirements for the (state and broker if applicable) Non-Emergency Medicaid Transportation program (specify the page or section). | |
| **7.05** | Software fully meets the Reporting requirements beginning on (specify the page or section). | |