



Customer Services, Operations, and Safety Committee

Board Information Item III-C

December 17, 2009

SmarTrip[®] Benefits Update

Washington Metropolitan Area Transit Authority
Board Action/Information Summary

<input type="radio"/> Action <input checked="" type="radio"/> Information	MEAD Number:	Resolution: <input type="radio"/> Yes <input checked="" type="radio"/> No
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TITLE:

Update on SmarTrip® Project and SmartBenefits®

PURPOSE:

To provide information to the Customer Service, Operations and Safety Committee regarding the SmartBenefits® and SmarTrip® Customer features. Presentation is attached.

DESCRIPTION:

Presentation is attached.

FUNDING IMPACT:

No impact on funding

RECOMMENDATION:

Presentation is for informational purposes.



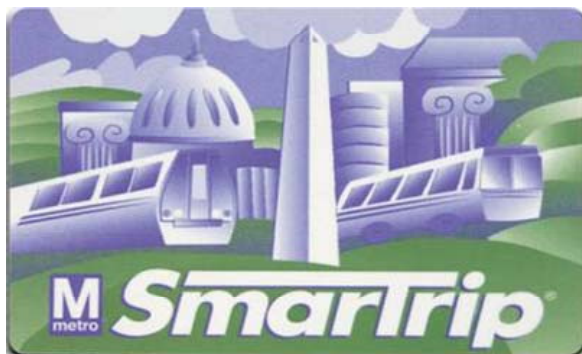
SmarTrip[®] Project and SmartBenefits[®] Update

Customer Service, Operations, and Safety Committee

December 17, 2009

Provide status update on:

- SmarTrip® project
- SmartBenefits® and the Internal Revenue Service
- Implementation of customer features
- Automatic Fare Collection (AFC) Strategy



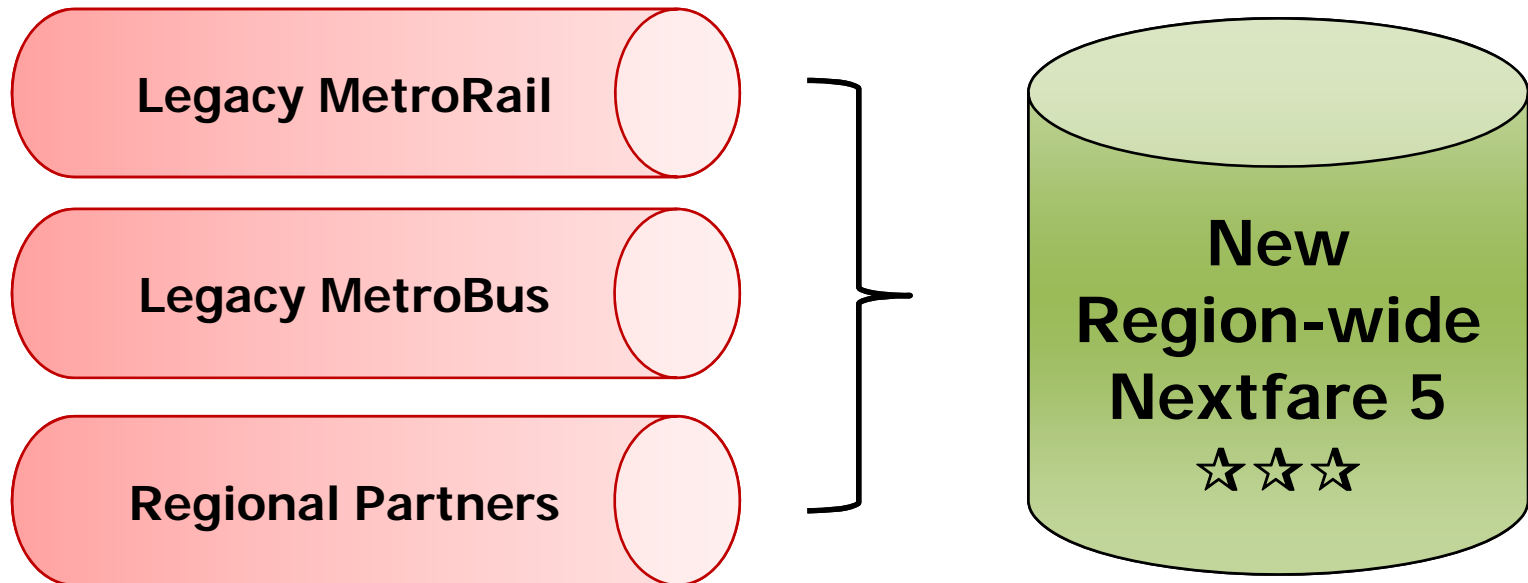


Components

- SmarTrip®/Nextfare system upgrade
- SmartBenefits®
 - Parking / transit benefit separation
- Customer features
 - Compact Point of Sale Devices (CPOS)
 - Passes
 - Self-Service Web site
 - Autoload

Complex system upgrade

- Migrate multiple regional systems into one system while ensuring backward compatibility during the migration.



Project testing and piloting before system-wide deployment

- Lab and field test software and hardware
- Debug issues
- Evaluate results:
 - Progress to system-wide upgrade/migration
 - Debug, retest, and re-evaluate results
- Conduct concurrent test/pilot/debug activities, where possible



SmartBenefits®

- SmartBenefits® is the web-based commuter benefits program that uses the SmarTrip® platform for employers to assign monthly transit and parking benefits.

Internal Revenue Service

- IRS issued a Ruling 2006-57 regarding the separation of transit and parking benefits on smart cards.

Customers

- Employers who assign commuter benefits
- Employees who receive commuter benefits





SMARTBENEFITS[®] IN 2010



No changes to SmartBenefits[®] program until January 2011

- IRS is expected to grant an extension of the effective date of IRS Revenue Ruling 2006-57 to January 1, 2011.
- SmartBenefits[®] program will operate in 2010 as it does today.



CUSTOMER COMMUNICATIONS

September – November 2009

- Held Employer seminars to discuss the implementation of separate transit and parking benefits

Employer Communication

- Issued news release
- Sent e-mail to employers and program administrators
- Posted notice on SmartBenefits[®] web pages
- Placed message on SmartBenefits[®] customer phone line
- Newspaper advertisement

Transit and parking benefits separation

- Not effective until January 1, 2011
 - Continue to seek and evaluate customer feedback
 - Finalize technical approach
 - Revise project schedule





SMARTRIP® NEW CUSTOMER FEATURES

Compact Point of Sale Devices (CPOS)

- Add value to SmarTrip® cards at 223 retail locations
- Completed October 2009

Passes

- Transit passes on SmarTrip® card
- Phased rollout – Late Spring 2010





SMARTTRIP® NEW CUSTOMER FEATURES

Self-service Web site

- View transactions, card balance, manage autoload feature, and add value to SmarTrip® cards
- Phased rollout – Late Spring 2010

Autoload

- Automatically add value or renew passes at faregates, fareboxes, or parking lots using transit benefits, credit card, or bank account
- Phased rollout – Summer 2010



PASS COMPONENTS

Existing paper passes

Agency	Number of Passes
Metro	7
Regional Partner Transit Agencies	15

Passes on SmarTrip®

- Test pass functionality (January – March 2010)
- Seek Board approval for a regional bus pass on SmarTrip® with revenue sharing (March 2010)
- Joint Regional Subcommittees to identify bus passes to make available on SmarTrip® and acceptance based on agency fare policies



WHERE WE ARE NOW

Upgrade of bus and rail systems required before deploying most customer features

- Bus fare system piloted and upgraded
- Rail system pilot underway
 - Resolving outstanding rail software issues before deploying system-wide
 - Anticipate full rail upgrade March 2010



AUTOMATIC FARE COLLECTION STRATEGY

AFC strategy

- All business units impacting or impacted by the AFC system are collaboratively drafting an agency-wide AFC strategy
- Focus is on customer
- AFC Vision
 - Maximize customer convenience by providing an accessible, reliable, and easy-to-use automatic fare collection system.