



STANDARD OPERATING PROCEDURE (SOP)

Effective Date:3/1/2022

Pages:9

Subject: CATCash/Diminishing Balance Fares- Operator

REV	DATE	DESCRIPTION	INIT

Originated By:

Genese Vertus, ITS Manager

Date

Reviewed By:

Omar De Leon
PTNE Transit Manager

Date

Approved By:

Michelle Arnold
Public Transit Director

Date

1. **SCOPE:** Eligible passengers have an established fare to ride CATConnect based on their eligibility and income. To enhance access to pay for their fare, CATConnect has implemented a diminishing balance/prepaid program called CATCash. This will allow passengers to add funds to an account which will be deducted for each time a trip is completed.
2. **PURPOSE:** To establish a procedure for Operators/Drivers to accept round trip fares and utilizing the diminishing balance/prepaid fare.
3. **ABBREVIATIONS / DEFINITIONS**

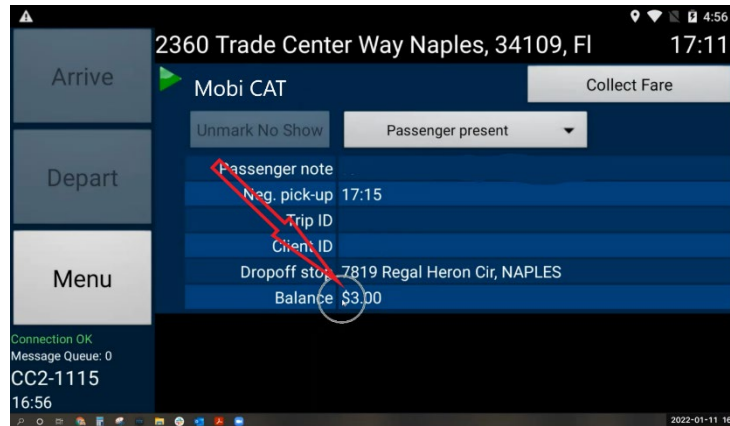
ABBREVIATION	DEFINITION
CAT	Collier Area Transit
CATConnect	Collier Area Transit's paratransit service.
ADA	Americans with Disability Act
TD	Transportation Disadvantage

4. **REFERENCES:** N/A
5. **FORMS:** N/A
6. **REQUIRED SAFETY EQUIPMENT / SPECIAL TOOLS:** None
7. **PROCEDURE:** The following sections will provide the process Operators/Drivers have to take when registers fares using the Diminishing Balance, also known as CATCash on the tablets in the vehicles; as well as how to process Round-trip fares that are paid at the first leg of the trip.

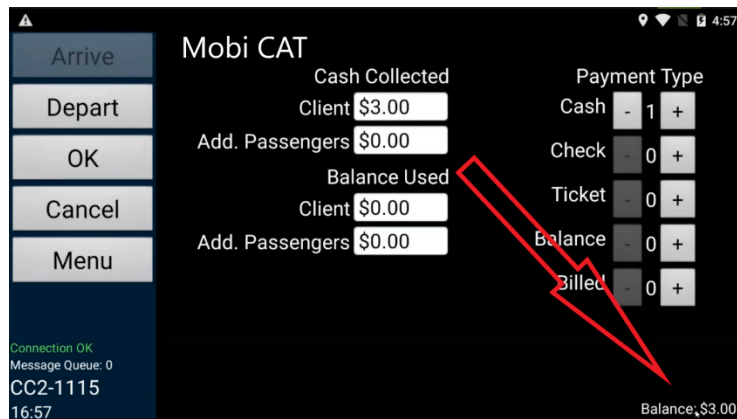
A. Using Diminishing Balance on the Tablet

Passengers now have the option of paying using an account balance that they have set up with Administration. When Operators/Drivers arrive at the pick-up destination they will be able to view on the Tablet screen whether the passenger has a diminishing balance. See screen below.

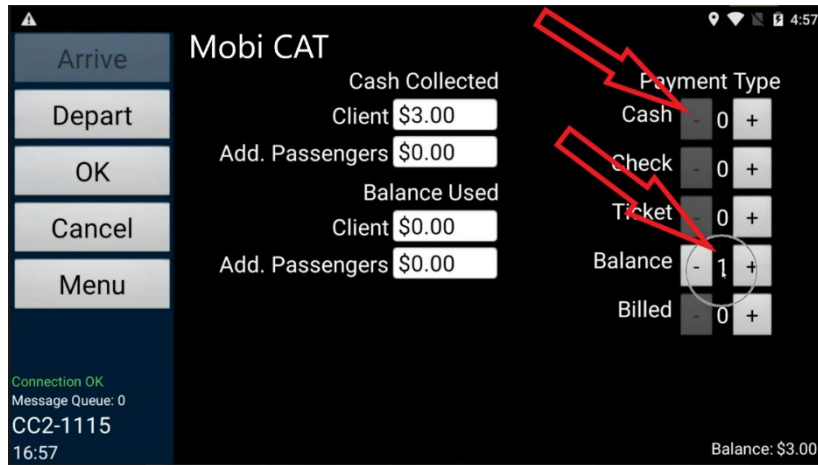
- The passenger will inform the Operator/Driver if they would like to use their balance to pay their fare.
- Once the passenger is on the bus click on the "Collect Fare" button on the upper right-hand corner of your Tablet screen.



- On the “Collect Fare” Screen the Driver will be able to view what the expected fare amount is. Please note that the system will default the “Payment Type” to “Cash” and the number under payment type is not representative of the fare amount. The number represents the number of fare types to be collected.
- If the passenger decides not to pay with cash and pay by balance, the driver must verify that the passenger has a balance available for use. This is viewable at the lower right-hand corner of the screen.

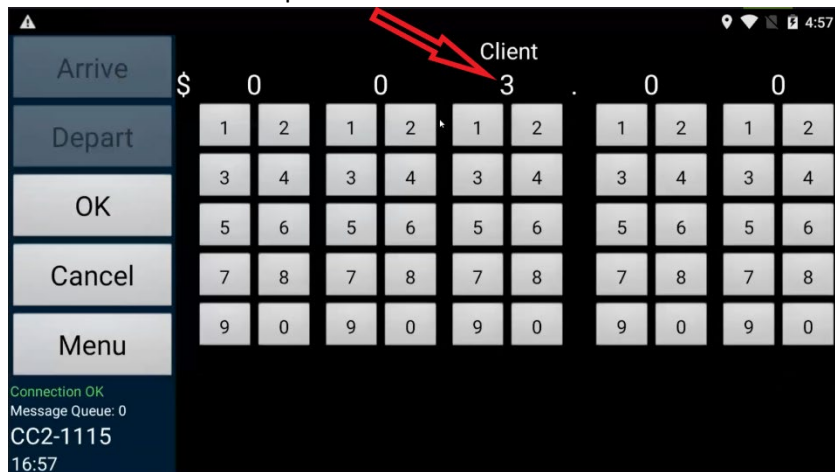


- If there is an available balance, the driver must change the default payment type from “Cash” by clicking the “Minus” sign next to “Cash” to clicking the “Plus” sign next to “Balance”. Remember the number under payment type correlates to the number of fare types to be collected from the passenger. In this case, the Cash payment type should be reduced to “0” and the Balance payment type should be increased to “1”. See below screen shot.
- The next step is to change the “Cash Collected” amount. The Driver must click on the dollar amount shown next to Client under “Cash Collected”. In the case, click on the \$3.00 to get to the “Cash Collected” screen.

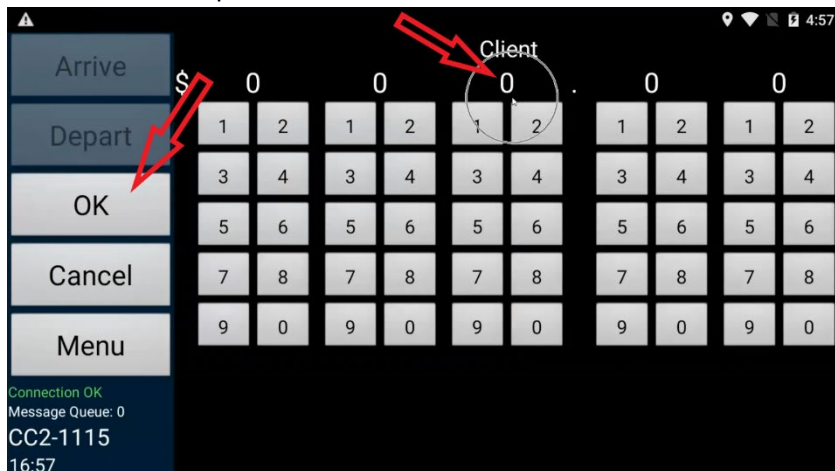


- On the “Cash Collected” screen as shown below, the Driver must change the monetary amount from \$3.00 to \$0.00 by clicking on “0” under the dollar column.
- After changing the amount, the Driver must click “OK” to back to the “Collect Fare” screen.

Examples of Cash Collected Screen



Examples of Cash Collected Screen Zeroed out



- When back on the “Collect Fare” screen then next step is to change the “Balance Used” amount by clicking the on the dollar amount shown next to Client under “Balance Used”. In the case, amount was changed from “\$0.00” to “\$3.00”. The Driver will see a similar screen as the ones shown above to change the “balance Used” amount.
- After making the changes for the Balance Used, the driver must click “OK” to get back to the “Collect Fare” screen shown below which shows the new Balance Used amount of \$3.00.

- The Balance amount in the lower right-hand corner of the screen will unchanged until the trip is completed, and the fare is deducted.
- It is very important that both of the payment type and the “Balance Used” functions are performed to effectively execute the diminishing balance process.
- The system does provide for multiple payment types to be used. If the passenger wants to pay with both cash and balance, the Driver will be able to split payments straight from the Tablet by adjusting the cash and balance amounts accordingly provided it is to equal the cost of the trip. See example below.

Example of Split Fare

- Once the Driver has confirmed all the required entries have been made, the Driver must click on “Depart” or click “OK” then click “Depart” to get back to the main screen.

Mobi CAT

Cash Collected		Payment Type	
Client	\$1.00	Cash	- 1 +
Add. Passengers	\$0.00	Check	- 0 +
Balance Used		Ticket	- 0 +
Client	\$2.00	Balance	- 1 +
Add. Passengers	\$0.00	Billed	- 0 +

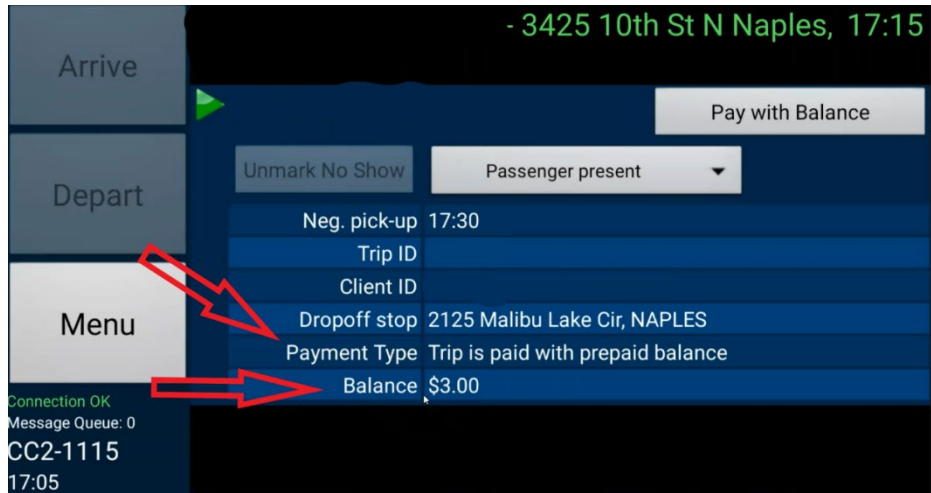
Connection OK
Message Queue: 0
CC2-1115
16:58
Balance: \$3.00

- Once back to the main screen, the Driver must click Depart to start the trip. The fare is deducted when the trip is completed, and the passenger arrives at his/her destination.

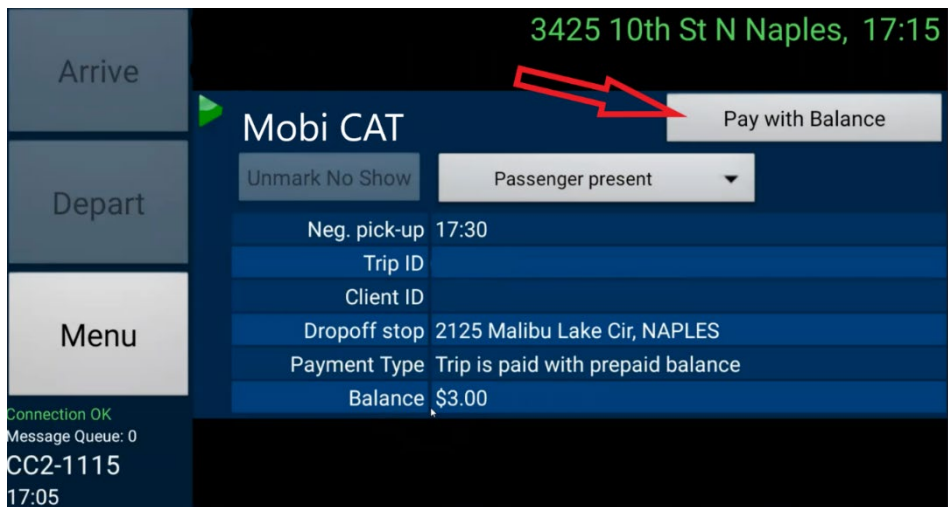
B. Processing Round Trip Fares

Passengers or their caregivers are permitted to pay for both legs of the trips at the time of the initial trip. When that occurs, the Driver must perform the following steps.

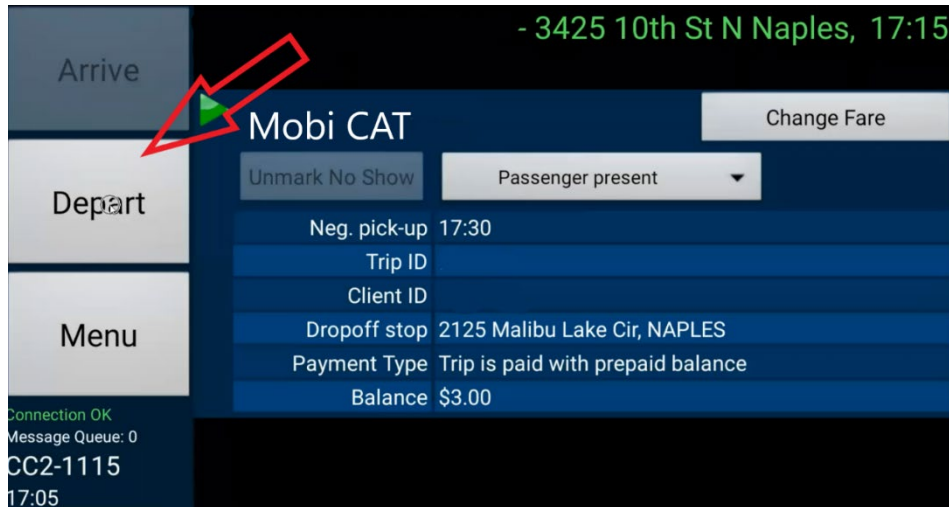
- If a passenger decides to pay round trip in cash at the time of the initial trip, the driver must contact Dispatch who will update the balance on the Passenger’s account to reflect the pre-payment. Once the Dispatcher has updated the balance, the Tablet will be updated to show that the second leg of the trip have been paid.
- When the Driver get word from Dispatch that the information has been updated, the Driver will process the trips as a normal one-way Cash transaction.
- When the Driver of the second leg of the trip arrives at the pick-up stop, the Driver will be able to confirm the balance for that trip is available and the notes for the “Payment Type” will indicated that the trip has been prepaid. See below.



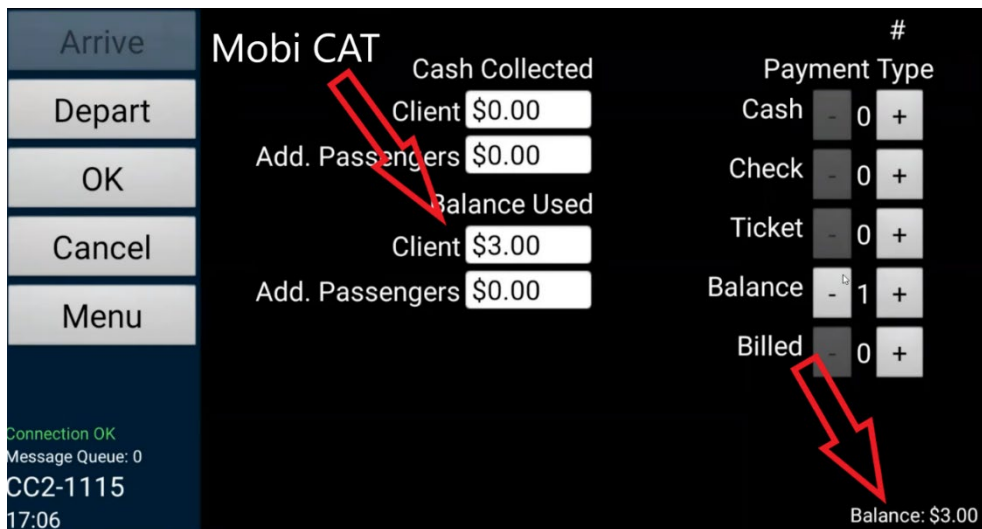
- Once the Passenger is on board, and the Driver has confirmed “Payment Type” and Balance, the Driver must click on “Pay with Balance” tab at the upper right-hand corner of the Tablet to accept the payment with balance.



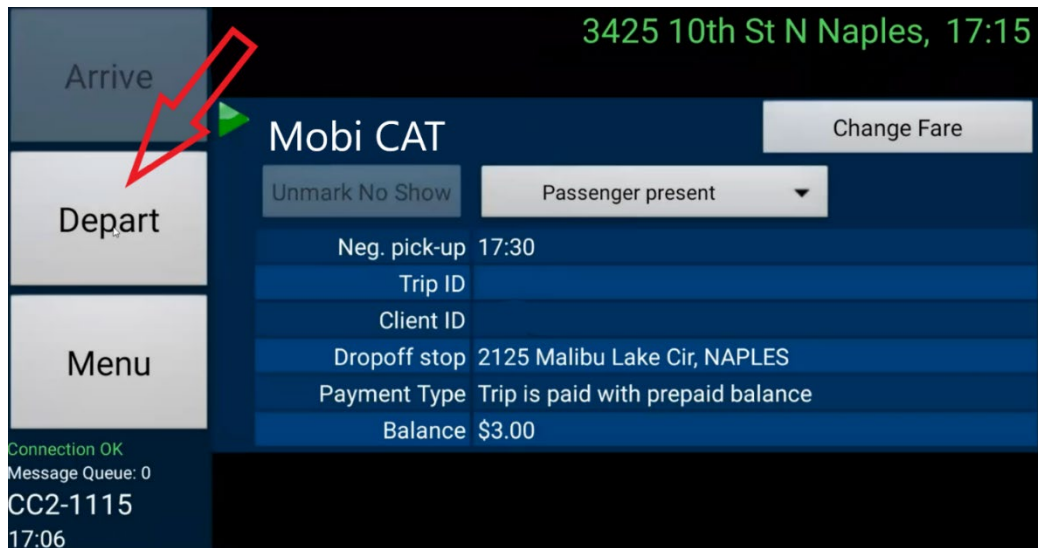
- The Driver will then be taken back to the main screen to click on “Depart” to start the trip.



- Before departing, the driver may verify that the passenger does have a balance, by clicking on the “Change Fare” tab on the upper-right hand corner. The screen below will be displayed, and the Driver can confirm that the amount shown in the “Balance Used” section equals the balance amount and is enough for the fare to be collected. If everything is correct, then the Driver should click “OK” to go back to the main screen.



- Once on the main screen, the Driver must click “Depart” to start the trip.



8. TRAINING:

All staff members involved in the process will be trained on the SOP and be given access to a video with instructions and demonstration.

- Sign off on training will be provide at the completion of training.