

FORM N (R1): Scheduling System Functional Requirements and Specifications

SUPPLY AND INSTALLATION OF SOFTWARE TO REPLACE HANDI-TRANSIT SCHEDULING AND Registrant MANAGEMENT SYSTEM

Instructions for completing Form N (R1): Scheduling System Functional Requirements and Specifications

1. Complete Form N (R1):.
2. Follow the instructions shown below that apply.

Instructions:

1. For each requirement, place and X in one (1) of the boxes that best describe your solution;
 - a. **Fully Available:** solution for the requirement is currently available in the existing product “out of the box”.
 - b. **Partly Available:** Solution for the requirement is partly available in the existing product, but will be modified to fully meet the requirements.
 - c. **3rd Party Supplied:** Requirement is expected to be met by using a 3rd party Successful Proponent’s existing product, either integrated or non-
 - d. **Will Build:** Will build a component to meet the requirement.
 - e. **Not Possible:** Requirement cannot be met by the Successful Proponent .
2. For each requirement, in the “describe Approach....” Box, describe in one or two sentences the approach that will be taken to provide a

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
SC	SYSTEM CONFIGURATION							
	Equipment Types							
SC01	Registrants can travel with equipment types such as wheelchairs, walkers, Oxygen Tanks, etc. Must have the ability to define a variety of equipment types including service animals	B16						
SC02	Equipment types must affect how Registrants are allocated to seats in vehicles	B16						
SC03	Loading and unloading times must be defined by equipment type.	B16						
SC04	Loading and unloading times should be defined for first passenger and subsequent passengers loading or unloading at same location	B16						
	Mobility Types							
SC05	Mobility types are used to define how a Registrant can maneuver getting in and out of vehicles. Must have the ability to define a variety of mobility types	B16						
SC06	Mobility types must affect how Registrants are allocated to seats in vehicles	B16						
	Vehicle Types							

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
SC07	Must be able to define a varied fleet of vehicle types and capacities	B16						
SC08	Vehicles must be configurable to allow maximum flexibility for combinations of Registrants and attendants	B16						
SC09	Vehicles must be configurable to allocate seats based on Registrant mobility codes	B16						
SC10	Vehicles must be configurable to allocate seats based on equipment types Registrants have designated to be taking on a trip	B16						
	Trip Reasons							
SC11	Trip reasons are used to identify the priority of a trip booking. Must be able to define Trip Reasons along with their priority. Transit currently uses a 3 priority system (1-2-3). Priority 1 trips are guaranteed	B16						
SC12	Trip reasons shall be used to determine when a Registrant can be picked-up and dropped-off based on their requested times. For example, a Registrant can be 10 minutes later that requested for a shopping trip but not for a medical appointment	B16						
GIS	GIS							
	Maps							
GIS01	The system must use a high-quality graphical interface with the ability to clearly view and distinguish roads, landmarks, and bodies of water	B16						
GIS02	Fast and intuitive geocoding shall allow staff the ability to search by street, intersection and monument	B16						
GIS03	The map should be able to define average speeds by time of day and day of week	B16						
GIS04	The map should be able to define road closures	B16						
GIS05	Staff shall be able to pan and zoom contents of map. The responsiveness of the map shall be smooth, instantaneous, and consistent with minimal lag or delay	B16						
GIS06	Map data shall be made available to incorporate new subdivisions, roads and monuments	B16						
	Addresses							
GIS07	Addresses used throughout the System shall correspond with location on the map	B16						
GIS08	New addresses shall be introduced through updates to GIS data.	B16						
	Monuments							
GIS09	Monuments or landmarks shall be definable. Abbreviations should exist to simplify entering a monument for a trip	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
GIS10	When an address is entered in the System which corresponds to a monument the monument name should be resolved	B16						
GIS11	Multiple monuments could have the same address so one shall be identified as the default when identified by address	B16						
GIS12	Monument definition should contain default trip reason	B16						
GIS13	Monument definition should contain additional amount of time for loading and unloading	B16						
	AVL							
GIS14	On-board devices must have AVL capabilities	B16						
FM	Fare Management							
	Fare Classes							
FM01	Fare classes shall be used to define what fares a Registrant and their attendants are eligible for	B16						
FM02	Senior fares shall be automatic once a Registrant reaches 65 years of age	B16						
FM03	A Youth fare shall be assignable to Registrants as age alone is not sufficient to identify youth eligibility	B16						
FM04	A Post-Secondary fare class shall be assignable to Registrants	B16						
FM05	Companion fares shall be configurable by fare class. Currently all non-mandatory attendants pay full fare regardless of age. Mandatory attendants do not pay a fare.	B16						
FM06	Must have an exempt fare class	B16						
	Passes / Rides							
FM07	Monthly passes must be available for each Fare Class	B16						
FM08	Rolling passes must be definable for various durations. A rolling pass becomes effective the first date of use and effective for the next defined consecutive days	B16						
FM09	Pass rates shall be definable by fare class and duration with an effective date	B16						
FM10	Single Ride fares must be definable by Fare Class	B16						
	Fare Payment from Account							

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
FM11	Registrants must be able to sign up for a Fare Collection from Account service by phone or on-line	B16						
FM12	Money deposited into their Handi-Transit account at their choice of financial institute must be able to be loaded into their account. Transit uses RBC Express to download deposits from financial institutions daily. Deposits are loaded and reconciled. Suspicious or un-reconciled deposits are investigated and can be posted at a later time	B16						
FM13	Money must be able to be deposited into their account at either a customer service center or by using credit card over the phone with a CSR	B16						
FM14	Pass purchases shall be able to be paid for from a Registrant's account	B16						
FM15	As a Registrant takes rides, if they do not have a valid pass, the appropriate fare must be deducted from their account	B16						
FM16	A Registrant's companion fares should be deducted from the Registrants account but shall be able to overridden if paid by cash or token	B16						
FM17	Registrant should have option to pay cash for fare. If fare already deducted from account then account is to be credited	B16						
FM18	A Registrants account shall be able to enter into a negative balance but after reaching a defined limit be identified for possible suspension	B16						
CR	Registrant Records							
	Registrant Eligibility							
CR01	A Registrant Assessment component must allow for definitions of a checklist to be used during the assessment process. Assessment checklist shall be viewable by employees based on access privileges	B16						
CR02	Shall be able to identify the occupational therapist that completed an assessment	B16						
CR03	Registrant records shall include a list of comments with date stamps to record notes regarding phone conversations or details on decisions made	B16						
CR04	Registrant records shall have the ability to attach original documents such as doctors' certificates, equipment photos, ect. with restricted access	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
CR05	Must be able to record a Registrant's eligibility from original application to resolution of Registrant's eligibility	B16						
CR06	Registrant eligibility history shall be available showing what changed at what time	B16						
CR07	Must be able to schedule a Registrant for an assessment appointment	B16						
CR08	Possible outcomes of eligibility assessments must include unlimited service, short term service, winter only service, and dialysis only	B16						
CR09	Assessment outcomes must have an expiry date where eligibility is no longer effective or needs to be re-assessed	B16						
CR10	Registrants deemed ineligible shall have reason why recorded as such	B16						
CR11	Registrants eligible for free regular transit shall be recorded as such	B16						
CR12	Eligibility information must include if the Registrant requires a mandatory attendant	B16						
	Registrant Information							
CR13	Comprehensive Registrant information shall be able to be recorded with effective dates for information subject to change	B16						
CR14	A Registrant status must be recordable by effective from-to dates. The Registrant status must be able to control their ability to book trips and limit the effectiveness of subscriptions	B16						
CR15	Registrant medical records shall be able to be scanned and saved for later retrieval	B16						
CR16	Registrant contact information must allow for definitions of how to contact a Registrant for different purposes	B16						
CR17	Registrant contact information for pending arrival notifications shall be in the form of phone # for IVR or SMS or an e-mail address	B16						
CR18	Registrants must be able to complete and submit their application online	B16						
	Registrant Travel Information							
CR18	Information related to a Registrant's ability to travel and requirements for travel must be recordable	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
CR19	A Registrant shall be able to be recorded whether they must be accompanied by a mandatory attendant or that they usually travel with an companion	B16						
CR20	Equipment types that a Registrant is authorized or must use shall be recordable with a default for trip bookings	B16						
CR21	Registrant must be able to be assigned mobility codes	B16						
CR22	Frequent travel information shall be able to be maintained or generated from Registrant history	B16						
CR23	Frequent address information shall be able to override the pending arrival notification definitions for the Registrant	B16						
CR24	Registrant exceptions shall be recordable to designate that the Registrant cannot travel with a specified contractor or contract or in a specific vehicle type	B16						
	Registrant Management							
CR25	Must have the ability to send pre-formatted letters to Registrants. Letter histories shall be kept	B16						
CR26	Special messages for Registrants that are shown to CSRs when booking trips shall be able to be recorded. These messages shall be able to be flagged as communicated	B16						
SD	Service Definitions							
	Drivers							
SD01	Drivers must be identified with a unique driver ID and have login credentials for the on-board device	B16						
SD02	Shall be able to scan documents (driver's abstract, criminal record check, copy of first aid certificate) into driver information for later retrieval	B16						
SD03	Driver information must include name, identification ID, driver's license #, training qualifications, certifications, hire date, contact information	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
SD04	Driver's must renew their certifications on a three year cycle, pending recertification's shall be flagged	B16						
SD05	Driver's license renewal information must be able to be recorded. Pending license renewals shall be identified.	B16						
	Vehicles							
SD06	Vehicles must be identified with a unique vehicle ID	B16						
SD07	Vehicle must be assigned a Vehicle Type which is used to define the capabilities of the vehicle	B16						
SD08	Vehicle registration and insurance information shall be able to be recorded	B16						
SD09	Vehicle inspection information shall be able to be recorded	B16						
	Contracts							
SD10	Must have the ability to define contractors with contact information	B16						
SD11	Must have the ability to define contracts for contractors with effective dates	B16						
SD12	Contracts definition must include rates. Transit currently has fixed hourly rate and per trip rate contracts	B16						
SD13	Contracts must contain budgeted amount of hours of service and cost per year.	B16						
SD14	Contracts shall be able to be monitored for status of actual verses budget	B16						
	Resources							

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
SD15	Resources are used to define a continuous piece of work to be carried out by a vehicle on a given day. Resources must be defined by contract	B16						
SD16	Hourly rate resource definitions must include the days of week they operate on, start and end times, minimum and maximum hours, and vehicle type	B16						
SD17	Hourly rate resource definitions must indicate how flexible their start/end times and minimum/ maximum hours are to allow for improved efficiency through continuous scheduling and dispatch activities	B16						
SD18	Per trip rate resource definitions shall include the days of week they operate on, start and end times, maximum total trips, maximum trips per hour, and vehicle type	B16						
SD19	Break periods shall be configurable and flexible so that if defined they provide required breaks for drivers with minimal effect on schedules	B16						
SD20	Resource definitions must use effective dates so they can be changed or cancelled for a date range	B16						
CB	Registrant Bookings							
	Subscriptions							
CB01	For Registrants which take the same trip on a defined repeating pattern there shall be a way for staff to define these trips so Registrant does not need to request them	B16						
CB02	Subscriptions shall contain origin, destination, requested times, trip reason, equipment type, mobility code, days of week, round trip or one-way, attendants and special comments	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
CB03	Subscription shall be able to be defied as requiring confirmation or assigned actual times. Confirmation would be required for each day subscription is in effect	B16						
CB04	Subscription definitions must be defined by effective dates	B16						
CB05	Exceptions shall be able to be recorded to cancel a subscription for a period of time. Cancellation shall be for entire trip or just pick-up or return portion	B16						
CB06	Must be able to flag and cancel Registrant subscriptions where Registrants have no-showed within defined parameters	B16						
CB07	Must be able to modify or update an existing subscription (i.e. update address) without having to re-enter all information	B16						
	Reservations							
CB08	Reservations must be controlled by the Registrant's eligibility. Registrants may be restricted to a specific trip reason or limited to a winter only or dialysis only	B16						
CB09	Registrants shall have the option to submit their own trip bookings by accessing a web site	B16						
CB10	Registrants shall have the option to submit trip requests using IVR technology	B16						
CB11	When recoding a reservation the CSR shall be alerted of any special messages pertaining to Registrant. If defined as such this message must be able to be flagged as communicated so it will not appear in the future	B16						
CB12	CSR shall have the ability to view the upcoming trips for a Registrant so as to avoid duplication of requests	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
CB13	CSR must be able to see current fare products and account balance so they can be easily communicated to the Registrant	B16						
CB14	CSR must be able to see fares accrued through future bookings so they can inform Registrant they will need additional funds in their account	B16						
CB15	CSR shall be able to select addresses from a list of frequently used addresses for the Registrant	B16						
CB16	CSR shall have ability to quickly look at trip and fare history for Registrant to answer questions from the Registrant	B16						
CB17	CSR must have ability to create duplicate trip booking for multiple days without re-entering all details	B16						
CB18	CSR shall be able to copy an existing trip for additional days	B16						
CB19	While most trips are either round trips or one-way trips, multi-way trips (trips with more than one destination) shall be defined without re-entering addresses	B16						
CB20	Addresses selection for reservation bookings shall be from a list the Registrant uses frequently, a monument or an actual address	B16						
CB21	Requested time for a reservation booking shall be either preferred arrival time or preferred pickup time.	B16						
CB22	Registrant equipment type and mobility shall be retrieved from Registrant information but changeable by CSR based on signing authority. Only equipment types approved for Registrant shall be allowed	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
CB23	Must be able to specify mobility equipment (i.e. cane or walker) for companion to reserve appropriate space in vehicle	B16						
CB24	Trip bookings requested after the batch scheduling has been requested shall be flagged as late bookings. The classification shall indicate how late the trip was requested.	B16						
	Group Bookings							
CB25	Similar reservations for multiple Registrants shall be able to be recorded so the scheduling components know the Registrants should be placed on same vehicle	B16						
SCH	Scheduling							
	On-Demand Scheduling							
SCH01	Transit does not currently deploy on-demand scheduling but the System shall be able to schedule trips as requested by Registrants and immediately provide a pick-up window for the Registrant	B16						
SCH02	On-Demand Scheduling shall be used after the batch scheduling is complete to alter schedules to accommodate late requests.	B16						
	Batch Scheduling							
SCH03	At a pre-determined time, currently 11:00 am, all the trips for the following day must be scheduled to the resources defined for that day	B16						
SCH04	Batch scheduling must handle up to 3000 trips per day and complete in a reasonable amount of time	B16						
SCH05	Scheduling algorithm must take into account the trip priority system and that priority 1 trips are guaranteed	B16						
SCH06	When scheduling, acceptable time windows must be calculated using requested times, optimal travel times, acceptable travel times and maximum time allowed in transport	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
SCH07	Acceptable time windows shall vary by trip reason. For example, for shopping trips the acceptable time window should be set such that the Registrant could be earlier or later than requested time. For medical trips the acceptable time window shall be set so the Registrant is not late for their appointment	B16						
SCH08	Scheduling algorithm shall take into account the following parameters when scheduling a trip: origin and destination addresses, requested pick-up or drop-off time, acceptable time windows, travel times with loading and unloading times, group ride requests, vehicle type, resource breaks, vehicle capacity, trip priority, equipment type, Registrant mobility and exceptions, requirement for a mandatory attendant, and companions requests	B16						
SCH09	Upon completion of schedule the start and end times of resources shall be updated to correspond with the first and last trip	B16						
Manual Scheduling								
SCH10	Effective batch scheduling should make manual scheduling unnecessary but for the exceptions there must be a mechanism for staff to make manual changes to resource assignments	B16						
Continuous Scheduling								
SCH11	Once batch scheduling is complete or at any time if using on-demand scheduling there must be a mechanism where the schedule is monitored for changes and improvements made automatically	B16						
SCH12	Trips where actual times have not been communicated to Registrants should have greater flexibility for change to improve efficiency of service	B16						
SCH13	Trips beyond the timeframe currently shown on driver manifests should have greater flexibility for change to improve the efficiency of the schedule	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
SCH14	Continuous scheduling shall have ability to notify dispatchers when changes to resource start/end times could be made to improve efficiency. This could be to lengthen or shorten a resource	B16						
CC	Confirmations and Cancellations							
CC01	Once the schedule has been created for a day Transit opens the schedule to allow for confirmation of trip times. As Registrants confirm their times it must be recorded as such so Transit is aware that the Registrant knows their times.	B16						
CC02	Confirmations must be available to Registrants via Website and IVR. Once trips confirmed they shall be flagged as such. Non-confirmed trips should allow for greater flexibility during continuous scheduling than confirmed trips	B16						
CC03	The means used by Registrants to confirm their actual trip times shall be recorded.	B16						
CC04	Confirmations must be able to be pushed to Registrants through email, SMS, or IVR based on Registrant configuration	B16						
CC05	Registrants shall be able to cancel trips via Website and IVR	B16						
CC06	If a no-show is recorded for the first part of a round trip the return portion of the trip shall be automatically cancelled	B16						
CC07	Trips cancelled within a pre-defined interval from scheduled time of travel shall be considered No-Shows	B16						
Operations Management								
On-Board Operation								
OM01	Vehicles must be equipped with a device that can receive a driver manifest electronically	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
OM02	Driver must be able to login to the device. Login information shall then be used to assign a driver and a vehicle to a resource	B16						
OM03	Once logged in and resource identified the manifest shall be electronically sent to the device	B16						
OM04	Manifest shall contain addresses, Registrant #, name, mandatory attendant flag, # companions trip was booked for, and expected fare details	B16						
OM05	Manifest must contain any special instructions for the trip request.	B16						
OM06	Device must allow entry of actions carried out by driver. Actions shall include picked up Registrant, dropped off Registrant, Registrant no-show and be time stamped	B16						
OM07	Device must allow entry of attendant/companion details and fares associated with them	B16						
OM08	As drivers record that a Registrant has been picked up the Registrants account shall be charged for the ride if necessary. Charge is to include companion charge where necessary	B16						
OM09	Device must be able to receive updates to manifest from a central dispatching function	B16						
OM10	Dispatching functions shall be configurable so that only a defined amount or timeframe of future trips are shown to the driver	B16						
OM11	Device must have AVL capabilities. Location data shall be communicated with central system so location can be displayed on a map	B16						
OM12	Device shall have a turn by turn direction capability	B16						
	Dispatching							

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
OM12	A dispatching function must be provided so Transit staff can monitor the status of the operations in real-time	B16						
OM13	Dispatch function must use mapping to show the status of all vehicles in service	B16						
OM14	Vehicles shall be highlighted when they are behind schedule	B16						
OM15	Vehicles shall be highlighted when they have a predetermined amount of down time	B16						
OM16	Vehicles shall be highlighted when they have not moved in a configurable amount of time	B16						
OM17	Dispatchers must have the ability to search for trip possibilities for on-demand trip requests or to accommodate a change to a future trip	B16						
OM18	Changes to vehicle manifests shall be sent to the vehicle on-board device in real time.	B16						
OM19	Must allow for dispatchers to change/extend hours of runs	B16						
	Inspection							
OM20	A mobile device shall be available for an Inspector to select a resource and see the location of the vehicle and the status of the vehicle with respect to its manifest	B16						
OM21	Shall have a checklist for vehicle checks, driver spot checks, and location reviews with a comment field for the inspector to record observations	B16						
	Registrant Notifications							
OM22	Based on the Registrants definitions a notification shall be sent to the Registrant for the pending arrival of the vehicle	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
OM23	Notifications, as defined for the Registrant, shall be in the form of an automated phone call, text message, or email message	B16						
OM24	Notifications shall be sent at a set time, defined by Registrant, before the expected arrival of the vehicle	B16						
OM25	Registrant must be able to use IVR or website to retrieve anticipated arrival time of their next trip	B16						
OM26	Registrants shall be notified via email or SMS when a trip has been changed, confirmed, or cancelled as a means of confirming the operation carried out by the Registrant	B16						
	Late Bookings (post-scheduling)							
OM27	Registrants shall be able to request trips after the scheduling has been performed with additional functionality to search for a time that could be accommodated	B16						
OM28	Late booking and additional functionality shall be provided via web, IVR and through a CSR	B16						
OM29	Registrant enters a trip request and if it can be accommodated the times shall be immediately confirmed. If not the System could suggest a time that could be accommodated	B16						
OM30	Transit must be able to disable late booking feature on days where weather or other influences may make schedule difficult to maintain	B16						
	No-Shows							
OM31	The ability must exist for Transit to identify Registrants who have accrued a pre-defined number of no-shows over a period of time	B16						
OM32	Actions taken from excessive no-shows must include the generation of letters to the Registrant, fines on their account and suspension of service	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
WEB	Website							
WEB01	A Website shall be provided that is integrated in to the existing Transit website and make use of Transit supplied graphics to make it look similar	B16						
WEB02	Website shall make use of secure login credentials for Registrants to gain access	B16						
WEB03	Website shall allow for recording of reservation trip bookings	B16						
WEB04	Website shall display Registrant trip history	B16						
WEB05	Website shall display upcoming trips (reservation and subscription) and allow cancellation of those trips	B16						
WEB06	Website shall allow for recoding that the scheduled future trip times have been confirmed	B16						
WEB07	Website shall display history of Registrants fare account.	B16						
IVR	IVR							
IVR01	Transit deploys the Voice Genie IVR suite from Genesys. IVR functionality shall make use of existing infrastructure	B16						
IVR02	IVR must prompt for Registrant # and pin # for secure access	B16						
IVR03	IVR shall speak future trips and allow for confirmation of scheduled times or cancellation of trips	B16						
IVR04	IVR shall have ability to communicate current account balance	B16						
IVR05	IVR shall have ability to create reservation bookings by selecting from a list frequently requested trips	B16						
DR	Daily Reconciliation							
DR01	Shall have a reconciliation of all passengers/companions/attendants carried with fare details by contractor and run	B16						
DR02	Shall record and calculate total contractor hours, including all changes, to create invoices	B16						
DR03	Shall create invoices based on contractor run hours and fares collected and calculate PST, GST, on total amounts	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
DR04	Shall be able to record service recovery fees by contractor	B16						
DR05	Shall be able to record driver service fees	B16						
DR06	Contractor Invoices must take into account service recovery and driver service fees. Driver fees are charged to contractors	B16						
IM	Incident Management							
	Incidents							
IM01	Incidents must be able to be recorded to track complaints, commendations and inquiries	B16						
IM02	Incidents must be able to be linked to Registrants, contractors, drivers and specific trips. These links are to provide incident histories	B16						
IM03	Incidents shall be categorized for reporting purposes	B16						
	Incident Workflow							
IM04	Incidents must be assignable to an organizational unit (role) for investigation or other action. Roles and Actions shall be configurable	B16						
IM05	Users shall be able to view an inbox for a role. The roles a user can access shall be configurable	B16						
IM06	A user shall be able to add a report to an incident and either assign it to another role or change the status of the incident	B16						
	Incident Reporting							
IM07	Printed versions of incidents must be provided for routing to contractors	B16						
IM08	Incidents requiring a response from a contractor shall be able to be viewed by the contractors as a third-party service provider so the response can be received electronically and recorded	B16						
IM09	Incidents waiting for response from contractor shall be flagged with a response date	B16						
IM10	Summary reports of incident counts by type and category over a date range shall be provided	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
RDM	REPORTS AND DATA MANAGEMENT							
RDM01	The system shall allow the ability to generate reports, manage data, and retrieve archived data	B16						
RDM02	Accurate reporting shall be made available of performance metrics, Registrant/trip history, vehicle performance, schedule adherence, passenger hours, revenue kilometers, vehicle operator performance, contractor hours etc.	B16						
RDM03	Ridership , kilometers, revenue, and revenue kilometers statistics shall be made available for each contractor	B16						
RDM04	The System shall be capable of compiling billing information to the respective contractors based on assignments to the respective vehicles	B16						
RDM05	The system shall be able to search across all of the customer profiles and fields with advanced search options. Search options shall include the ability to limit searches among a select group of customers based on selected parameters. The search algorithm shall take into account incomplete words and wildcards.	B16						
RDM06	Registrant trip reports shall be retrievable by selecting a date range. The report shall include trip types and trip status information.	B16						
RDM07	All search results, compiled list, and reports shall be sortable by any of the Registrant profile fields. This shall include, but not limited to, alphabetically, numerically, chronologically and categorically based on the selected field's parameters.	B16						
RDM08	Reports shall be customizable using an intuitive graphical user interface and have output in text, Excel and PDF formats	B16						
RDM09	Shall have a report on total # of equipment types of Registrants	B16						
RD10	Reports on total # of applications, assessments, re-registration by week, month and annually	B16						
	Ridership Statistics Reports							
RDM09	All of the ridership data needs to be able to be tabulated by day, month, and year. Also by age group, mobility type, vehicles type and by contractor provided	B16						
RDM10	Ridership tabulated by number of on-way tips per passenger type, taken by registered ambulatory and non-ambulatory riders, attendants, and companions,	B16						
RDM11	Ridership needs to be broken down by age group, (i.e. adults, senior, student child,	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
RDM12	Number of active Registrants	B16						
RDM13	Ridership needs to be tabulated and be able to be grouped into dedicated and non-dedicated service (flat rates)	B16						
RDM14	Ridership needs to be tabulated based on trip reason - medical, shopping, works, school, dialysis etc.	B16						
RDM15	<p>Need to be able to report on trip reason:</p> <ul style="list-style-type: none"> total number of trips requested total number of trips accommodated total number of trips un-accommodated total number of no-shows total number of trips total number of trips cancelled at door total number of missed trips total number of vehicles no-shows total number of trips late over 20 minutes total number of trips moved for lateness total number of missed trips total number of snow days trips origin and destination data number of trips to and from major destinations (i.e. terminals, hospitals etc..) 	B16						
	Operating Statistics Reports							
RDM16	Cost Reports - need to be able to obtain detail cost reports for each contractor	B16						
RDM17	Reports are required; daily, weekly, monthly, and yearly	B16						
RDM18	Reports require separation by service type: bus, van, car, flat rate	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
RDM19	<p>Each report must identify each run and contain; Total revenue km Total deadhead km Total km (revenue and deadhead combined) Revenue km and deadhead km expressed in percentage (%) of total Scheduled km's Passenger per vehicle manifest Km per vehicle manifest Flagged passenger list</p>	B16						
RDM20	<p>Flat Rate Reports must include detail data on each trip including; Registrant Id Date of travel Pick-up and drop off location Number of trips Contractor Daily, weekly, monthly and annual summaries</p>	B16						
RDM21	<p>Revenue Hours Summary will require a report that will calculate revenue and no-revenue service hours by contractor and service type Summary should be provided for each contractor/service provider and by service type (i.e.. Vans, buses). Daily, weekly, monthly and annual summaries</p>	B16						
RDM22	<p>Cost and Passenger per Hour Summary needs to calculate the cost/passenger and cost/passenger per hour by ; contractor, vehicle type. Daily , weekly, monthly and annual summaries</p>	B16						
RDM23	<p>Run Productivity Report must summarize each run daily, weekly, monthly productivity by ; run #, unit # , contractor name, first and last pick-up and drop off time revenue and total hours revenue and total kms number of completed trips total passengers productivity passenger/hour (total passengers/revenue hours) productivity Avg Trip length (revenue km/total passengers)</p>	B16						

ITEM	The Bidder shall supply a System in accordance with the requirements hereinafter specified.	Item Reference	Currently Available	Partly Available	3rd Party Supplied	Will Build	Not Possible	Describe approach or available feature
RDM24	AD hoc Reports ability to generate ad hoc reports ability to have filter options based on billing codes, passenger type, vehicle type and service provider ability to query the database to export specific reports such as travel pattern report	B16						
RDM26	Dispatcher Trip Notes ability to print out dispatcher trip notes by service provider, and trip purpose	B16						
RDM27	Should have a report of all visa transactions processed for payment of fares	B16						