

APPENDIX A — PROJECT ITEMS PRIORITIZATION MATRIX

Fare Collection System Upgrade

This Matrix defines the official inclusion status of all potential features for this procurement.

Only items classified “M — Must-Have” are in scope for this phase and must be delivered and priced.

Scope Control & Enforcement

- **M — Must-Have** items are **in scope, must be priced, and must be delivered in full.**
- **S / C / W** items are **out of scope** for this phase, **shall not be priced**, and **shall not be included** in proposed alternatives, substitutions, or change-order basis.
- Vendors shall not bundle, discount-offset, or condition pricing on any S/C/W items; pricing must reflect only M-classified scope without cross-subsidization.

Precedence Rule

In the event of any conflict between this Matrix and any narrative section of the Scope of Work,

this Appendix governs with respect to feature inclusion, feature scope, and pricing obligations,

unless later superseded by formally executed amendment.

Scope Legend (Interpretive Rule)

Code	Meaning	Procurement Status
M — Must-Have	Required this phase	In scope, priced, delivered
S — Should-Have	Desirable but deferred	Not in scope, not priced
C — Could-Have	Optional / low priority	Not in scope, not priced
W — Won't-Have (this phase)	Explicitly excluded	Not in scope, not priced

Partial or incomplete fulfillment of a multi-function “M” item does **not** constitute compliance.

Change Control

This Matrix may be changed only by a formal written Addendum issued prior to solicitation close.

After closing, all classifications are frozen and not subject to reclassification, negotiation, or deletion except through a later contract amendment initiated by the Agency.

PROJECT ITEMS PRIORITIZATION MATRIX — CONTRACT GOVERNANCE NOTICE

Code		Meaning		Scope Effect
M — Must-Have		Required for launch		In Scope / Must be priced / Must be delivered
S — Should-Have		Valuable but deferrable		Out of Scope / Not priced in this phase
C — Could-Have		Nice to have		Out of Scope / Not priced in this phase
W — Won't-Have (this phase)		Explicitly excluded		Out of Scope / Not priced / Not proposed
ID	Category	Feature Description	Detail	Vote (M/S/C/W)
1	I. Core System Capabilities	Automated Processes	Elimination of manual workarounds and processes for sales, inventory, audits, and reporting.	S
2	I. Core System Capabilities	Account-Based System	Centralized management of customer accounts.	S
3	I. Core System Capabilities	Account-Based System: Managed accounts	Similar to parental control, allowing someone other than the account owner to manage an account.	S
4	I. Core System Capabilities	Account-Based System: Load cash onto digital accounts	Ability to offer alternative ways to load cash onto digital accounts.	S
5	I. Core System Capabilities	Account-Based System: Negative balance for one trip	Ability for riders to carry a small negative balance on their account for one final trip.	W
6	I. Core System Capabilities	Account-Based System: Caregiver/family payment delegation	Capability for caregiver/family payment delegation features.	S
7	I. Core System Capabilities	Account-Based System: User account portal	A portal for riders to manage their accounts.	S
8	I. Core System Capabilities	Account-Based System: Log wheelchair/physical assistance needs	Ability to log wheelchair usage or physical assistance needs in customer profiles.	S
9	I. Core System Capabilities	Unified Sales & Data Dashboard	A single platform integrating POS, Farebox, Mobile Ticketing, and Paratransit data.	M
10	I. Core System Capabilities	Dashboard for Reporting	A specific dashboard view for reporting.	M
11	I. Core System Capabilities	Multi-Language Support	Translation into Spanish, Tagalog, Korean, Hmong, Samoan, and Yupik.	S
12	I. Core System Capabilities	Scalability	Ability to support future expansions like microtransit and TNC partnerships.	M
13	I. Core System Capabilities	ADA Compliance	Simple, ADA-compliant interfaces for drivers and clients.	M
14	I. Core System Capabilities	Interoperability (Transfers)	Interchangeable fare media between fixed-route and paratransit services.	S
15	I. Core System Capabilities	Fare Capping System	Implementation of a fare capping system to ensure riders don't overpay.	M
16	II. Point-of-Sale (POS) System	Point of Sale (POS) Scope of Work	Customer Service Scope of Work	S
17	II. Point-of-Sale (POS) System	Comprehensive Sales: Sell individual passes	Ability to sell individual passes.	M
18	II. Point-of-Sale (POS) System	Comprehensive Sales: Sell bulk passes	Ability to sell bulk passes.	M
19	II. Point-of-Sale (POS) System	Comprehensive Sales: Sell smart cards	Ability to sell smart cards.	M

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20 II.	Point-of-Sale (POS) System	Comprehensive Sales: Sell paper passes	Sell paper passes at the AnchorRides office.	C
21 II.	Point-of-Sale (POS) System	Payment Processing: Collect cash payments	Collect cash payments for sales transactions.	M
22 II.	Point-of-Sale (POS) System	Payment Processing: Collect check payments	Collect check payments for sales transactions.	M
23 II.	Point-of-Sale (POS) System	Payment Processing: Collect credit card payments	Collect credit card payments for sales transactions.	M
24 II.	Point-of-Sale (POS) System	Payment Processing: Track split payments	Correctly track split payments for sales transactions.	C
25 II.	Point-of-Sale (POS) System	Payment Processing: Online purchases	Ability to buy passes online other than what's currently offered on mTicket.	S
26 II.	Point-of-Sale (POS) System	Reporting & Auditing: End-of-day cashier reports	Prepare comprehensive end-of-day cashier reports that include item sales by day, sales summary by payment method, and verification reports.	M
27 II.	Point-of-Sale (POS) System	Reporting & Auditing: Document sales transactions	Use spreadsheets and automated fare management system to document sales transactions for bus passes.	W
28 II.	Point-of-Sale (POS) System	Reporting & Auditing: Document bundle pass sales	Prepare and document bundle pass sales by bundle number.	S
29 II.	Point-of-Sale (POS) System	Reporting & Auditing: Verify till amounts	Verify amounts in opening and closing till.	M
30 II.	Point-of-Sale (POS) System	Reporting & Auditing: Void sales transactions notification	Notify the Customer Service Manager to void sales transactions.	M
31 II.	Point-of-Sale (POS) System	Customer Management: Check banned rider list	Check the name on customer's identification with the banned rider's list to prevent selling bus passes to banned riders.	S
32 II.	Point-of-Sale (POS) System	Customer Management: Create client accounts	Create new client accounts.	M
33 II.	Point-of-Sale (POS) System	Customer Management: Deactivate inactive/unused/expired	Need for a process to delete old smartcard accounts. Option to re-activate inactive passes.	M
34 II.	Point-of-Sale (POS) System	Customer Management: Take customer pictures	Take customer pictures for new smart cards. Client image taken using computer camera OR imported from e-mail. Updatable SC Images.	M
35 II.	Point-of-Sale (POS) System	Customer Management: Record Conservatorships	Accurately record incoming transactions and check nested under Conservatorships. Conservatorship Group, Conservator Name, Conservator Contact #, Extension	M
36 II.	Point-of-Sale (POS) System	Customer Management: Third-party payment assignment	Third-party payment assignment (e.g., Medicaid) for Paratransit.	C
37 II.	Point-of-Sale (POS) System	Customer Management: Caregiver-linked accounts	Caregiver-linked accounts for Paratransit.	C
38 II.	Point-of-Sale (POS) System	Customer Management: Senior/Veteran Discount Qualification Portal	If over 60, should automatically designate Senior Status. Portal for users aged 65+ to qualify for veteran or senior discounts.	S

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39	II. Point-of-Sale (POS) System	Customer Management: Smart Card Account Searchability	Smart Card Accounts should be searchable by: Client Name (full or partial), SCID, SC Expiry Date (Full or Partial), Phone Number, Birth Date (full or partial).	M
40	II. Point-of-Sale (POS) System	Customer Management: Delete Smart Card Remarks	Must be able to delete remarks for Smart Card accounts.	M
41	II. Point-of-Sale (POS) System	Flexibility: Add/expand sale items	Add/expand available sale items, including the correct report code.	S
42	II. Point-of-Sale (POS) System	Flexibility: Tab/type navigation	Allow tab/type instead of mouse-click within reports and PoS.	S
43	III. Smart Card Functionality	Issuance & Management: Print smart cards	Create new client accounts and print smart cards. Must be able to re-print Smart Cards.	M
44	III. Smart Card Functionality	Issuance & Management: Deactivate lost/stolen smart cards	Deactivate lost or stolen smart cards and passes. Internal SCID# used to deactivate lost and stolen card.	M
45	III. Smart Card Functionality	Issuance & Management: Confirm remote smart card capability	Confirm remote smart card capability.	S
46	III. Smart Card Functionality	Tracking & Monitoring: Monitor pass type/date/expiration	Monitor pass type, loading date, and current pass expiration for smart cards. Pass Type(s) Loaded, Date Loaded, Expiry of current passes available. This data	M
47	III. Smart Card Functionality	Tracking & Monitoring: Generate unique IDs	Generate unique smart card identification numbers. Smartcard ID# This # does not change when reprinting.	M
48	III. Smart Card Functionality	Tracking & Monitoring: Internal SCID# Tracking	Internal SCID# 901 sequence. This data needs to be tracked cumulatively, not deleted when new ID is provided. The Internal SCID# changes when a new card is	M
49	III. Smart Card Functionality	Tracking & Monitoring: Issue Date Tracking	Issue Date needs to be tracked per ID printed, with each new ID issued being its own line item.	s
50	III. Smart Card Functionality	Fare Media Interoperability	Smartcards and fare media should be valid across all PTD transit modes.	M
51	III. Smart Card Functionality	Transition away from paper passes	Support smartcards (tap and go), mobile payments, and QR code scan-pay systems only.	M
52	III. Smart Card Functionality	Loading: Load multiple passes to same SCID	Must be able to load multiple passes to the same SCID during a single transaction. EX: (2)30Day passes, (3)7Day passes, etc..	M
53	III. Smart Card Functionality	Loading: Load multiple SCIDs in a single transaction	Must be able to load multiple SCID's in a single transaction. EX: Jane Doe and John Doe both wish to load (2)30Day passes to their separate smart card, but share a	M
54	III. Smart Card Functionality	Internal: Active/Inactive/Banned Option	Active/Inactive/Banned option to re-activate inactive passes.	s
55	III. Smart Card Functionality	Internal: SCID Expiry Date	SCID Expiry Date in Month/Year format.	S
56	III. Smart Card Functionality	Internal: Incoming/Outgoing Check Data Line	Date Received, Check #, Check \$, 90 Day Expiry (checkbox), Loaded (checkbox), Returned (checkbox), Date Processed, Notes. Nested Under Conservatorships.	M
57	IV. Inventory Tracking and Re	Automated Tracking: Bundle passes auto-generation	Bundle passes (AFM2 should automatically generate bundle number).	M

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58	IV. Inventory Tracking and Re	Automated Tracking: Track transferred passes	Track transferred passes (example transferring passes from Main vault to Cashiers inventory or till). Item Type, Transfer From Vault or TDCF location, Transfer To Vault of	M
59	IV. Inventory Tracking and Re	Automated Tracking: Import new passes	Import new passes (example passes from vendor to CS main vault). Ability to delete erroneously imported passes. Each Item Type should be able to use overlapping	M
60	IV. Inventory Tracking and Re	Automated Tracking: Track passes from all locations	Track passes from all location (CSR, Main vault, CS safe) through passes ranges.	M
61	IV. Inventory Tracking and Re	Automated Tracking: Search function for passes	Searchable by full or partial Serial #, with a Find Next function for Passes Available and Passes Available by Pass Type and Range reports.	M
62	IV. Inventory Tracking and Re	Automated Tracking: Void/delete mistaken inventories	Void/delete mistakenly entered inventories.	M
63	IV. Inventory Tracking and Re	Comprehensive Reporting: Master Inventory by location	Generate reports including Master Inventory by location. Location by TDCF## or Vault ID. Required by Accounting for Cash Journal.	M
64	IV. Inventory Tracking and Re	Comprehensive Reporting: Item listing by GL	Generate reports including Item listing by GL. Used to cross-check GL Reports, also used to determine accurate coding/abbreviations for PoS. Report should include	M
65	IV. Inventory Tracking and Re	Comprehensive Reporting: Transaction Detail	Generate reports including Transaction Detail. Report should include TransID#, Cashier Name, TDCF##, Date of Transaction. Lines should be separated by Product type,	M
66	IV. Inventory Tracking and Re	Comprehensive Reporting: Credit Card Details	Generate reports including Credit card Details. Report Shows: Should include Date, Time, Cashier, Sale ID (POS), Authorization (Converge), Amount, and Item sold.	M
67	IV. Inventory Tracking and Re	Comprehensive Reporting: Verification Report	Generate reports including Verification Report. Report Shows: Should include TDCF##, Cashier, TDCF opening and closing inventory per Pass Type, Cash Check and	M
68	IV. Inventory Tracking and Re	Comprehensive Reporting: Sale Detail by item/serial	Generate reports including Sale Detail by item and serial number. Report Shows: Each line item should include the original PoS transaction ID#, TDCF##, Name of cashier,	M
69	IV. Inventory Tracking and Re	Comprehensive Reporting: Item Sales by day	Generate reports including Item Sales by day. Report should show: Each line item should include Item Type, Quantity sold, Total value of item(s) sold in that line.	M
70	IV. Inventory Tracking and Re	Comprehensive Reporting: Void reports	Generate reports including Void reports. Report Shows: Each void line item should include the original PoS transaction ID#, TDCF##, Name of voider, Item type,	M
71	IV. Inventory Tracking and Re	Comprehensive Reporting: GL Summary by credit card total	Generate reports including GL Summary by credit card total. Report Shows: Each line item should include the date, GL account #, Quantity sold, and Total amount sold.	M
72	IV. Inventory Tracking and Re	Comprehensive Reporting: GL Sales by Date Cash/check total	Generate reports including GL Sales by Date Cash and check total. Report Shows: Each line item in this report should include the date, GL account #, Quantity sold, and	M
73	IV. Inventory Tracking and Re	Comprehensive Reporting: Sales Summary by Method	Generate reports including Sales Summary by Method. Report should show: Each line item should include Item Type, Price of Item Type, Quantity sold, Total value of	M
74	IV. Inventory Tracking and Re	Comprehensive Reporting: Passes Available (Internal Audit)	Internal audit report. Should be searchable by full or partial Serial #, with a Find Next function. Report: Should include Serial #, Item Type, and Location of pass.	M
75	IV. Inventory Tracking and Re	Comprehensive Reporting: Passes Available by Pass Type	Internal audit report. Also used to confirm location of passes, if needed. Should be searchable by full or partial Serial #, with a Find Next function. Report: Should include	M
76	IV. Inventory Tracking and Re	Invoice clients for bulk orders	Invoice clients for bulk orders.	M

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77	IV. Inventory Tracking and Re	Prepare orders through Order Management	Prepare orders through Order Management.	M
78	IV. Inventory Tracking and Re	Generate packing slip for bulk orders	Generate packing slip for bulk orders.	M
79	IV. Inventory Tracking and Re	Bundle Creation Functionality	Bundles are used to efficiently sell bulk passes, improving efficiency for large orders. Allows CS Rep to enter a single value. Fields include Item Type, Location (TDCF##, Vault	M
80	V. Farebox and Fare Collectio	Farebox: Do not accept large bills	Fareboxes should not accept large bills to avoid providing reimbursements when no change is given.	S
81	V. Farebox and Fare Collectio	Farebox: Capable of processing cash	Obtain a farebox capable of processing cash.	M
82	V. Farebox and Fare Collectio	Farebox: Account-based cash tracking	Account-based tracking of cash transactions, linking riders to payments and the specific fare media used.	M
83	V. Farebox and Fare Collectio	Farebox: Accept smartcards	Compact fare devices that validate cash, accept smartcards.	S
84	V. Farebox and Fare Collectio	Farebox: Accept contactless debit/credit	Compact fare devices that accept contactless debit/credit (Open Payment options: Credit card, Apple Pay, Google Pay, other mobile payment wallets, and debit cards).	S
85	V. Farebox and Fare Collectio	Farebox: Accept mobile app payments	Compact fare devices that accept mobile app payments.	S
86	V. Farebox and Fare Collectio	Farebox: Visual and audio confirmation	Visual and audio confirmation of successful fare payment onboard.	M
87	V. Farebox and Fare Collectio	Farebox: Offline fare queuing	Offline fare queuing with automatic upload when back online.	M
88	V. Farebox and Fare Collectio	Farebox: Eliminate manual button presses	A manual button override available for recording fares.	M
89	V. Farebox and Fare Collectio	Farebox: Read mobile tickets automatically	Mobile ticketing should register with the farebox, without requiring a manual keypress by the driver.	M
90	V. Farebox and Fare Collectio	Farebox: Support for UPass program	Fare collection for the UPass program without requiring a unique key for each program or manual validation.	M
91	V. Farebox and Fare Collectio	Farebox: Accept credit card payments	Ability to accept credit card payments at the farebox.	M
92	V. Farebox and Fare Collectio	Farebox: On paratransit vehicles	Farebox on paratransit vehicles for transactions and reporting.	w
93	V. Farebox and Fare Collectio	Self-Service Options: Ticket Vending Machines (3)	Provision of cashless Ticket Vending Machines (TVMs).	C
94	V. Farebox and Fare Collectio	Farebox: Accept ticket transfers from all accepted media	Ability to issue transfer tickets to riders.	S
95	VI. Mobile Ticketing Capabilit	Distribute complimentary tickets	Distribute complimentary tickets.	S

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96	VI. Mobile Ticketing Capabilit	Issue tickets for promotional events	Issue tickets for promotional events (marketing initiatives) using a designated code.	S
97	VI. Mobile Ticketing Capabilit	Dedicated ticket type for Ptab board members	Dedicated ticket type for Ptab board members, with ticket validity defined by the board's scheduled service dates.	C
98	VI. Mobile Ticketing Capabilit	Create and manage partner accounts/tickets	Create and manage partner accounts or tickets.	C
99	VI. Mobile Ticketing Capabilit	Track partner transactions for invoicing	Track their transactions for invoicing.	S
100	VI. Mobile Ticketing Capabilit	Allow partners to review transaction history	Allow partners to review their own transaction history.	M
101	VI. Mobile Ticketing Capabilit	Migrate passes between devices/accounts	Migrate passes from an existing device or account to a new one.	M
102	VI. Mobile Ticketing Capabilit	Deactivate accounts (admin only)	Deactivate accounts as necessary (restricted to administrative functions only).	M
103	VI. Mobile Ticketing Capabilit	QR code generation for ride promotions	Ability to generate QR codes for ride promotions/marketing.	M
104	VII. Reporting and Data Need	Fare type usage by stop (UPass)	Valuable to see fare type usage broken down by stop, particularly for UPass riders (where they get on and off the bus).	C
105	VII. Reporting and Data Need	Insights into demographic specific passes	If different fare products cater to specific demographics (e.g., senior, youth, student passes), the system should provide insights into their usage patterns.	C
106	VII. Reporting and Data Need	Ridership reports post-service changes/promotions	Ability to easily generate reports comparing ridership before and after service changes or fare promotions.	S
107	VII. Reporting and Data Need	Detailed reports on processing fees	For mobile ticketing or credit card transactions, detailed reports on processing fees are needed.	S
108	VII. Reporting and Data Need	Tracking unredeemed smart card value	For smart card systems, tracking the amount of unredeemed value on cards helps with financial planning and compliance.	C
109	VII. Reporting and Data Need	Daily Reports	Reports/data needed daily.	M
110	VII. Reporting and Data Need	Scalability of reporting	Ability to scale up reporting frequency and detail.	S
111	VII. Reporting and Data Need	AnchorRides revenue reconciliation report	AnchorRides revenue reconciliation report that ties to the dollar cost per trip/recorded in SAP.	w
112	VII. Reporting and Data Need	Categorized/Analyzed sales detail for revenue projections	Ability to categorize and analyze sales detail for revenue projections based on pass/fare box sales by pass type, frequency, customer, and payment method.	M
113	VII. Reporting and Data Need	Sales and revenue according to mode	Detail of sales and revenue according to mode (fixed route = People Mover, demand response = AnchorRides, micro transit).	M
114	VII. Reporting and Data Need	Daily/monthly fare revenue reports	Daily and monthly reports for fare revenue by type (cash, card, mobile).	M

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115	VII. Reporting and Data Need	Trip-to-fare reconciliation (Paratransit)	Trip-to-fare reconciliation reports for Paratransit.	w
116	VII. Reporting and Data Need	Smartcard usage and load activity reports	Smartcard usage and load activity reports.	M
117	VII. Reporting and Data Need	Agency billing and invoicing reports	Agency billing and invoicing reports.	M
118	VII. Reporting and Data Need	Customizable report filters	Customizable filters for service type, funding source, and fare category.	S
119	VIII. Integration Requirement:	Avail ETMS Software Integration	Any new system would have to integrate with our Avail ETMS software.	M
120	VIII. Integration Requirement:	TripSpark Integration	Integration with TripSpark for trip-payment matching (with awareness of potential system management program changes).	S
121	VIII. Integration Requirement:	Financial System Integration	Financial system integration for fare auditing and reconciliation.	C
122	VIII. Integration Requirement:	Existing CSR POS System Compatibility	Compatibility with the existing CSR POS system.	w
123	VIII. Integration Requirement:	FTA-Compliant Reporting Compatibility	Compatibility with FTA-compliant reporting.	M
124	VIII. Integration Requirement:	Genfare Access to Systems	Genfare needs to be granted access to systems by the IT department.	W
125	VIII. Integration Requirement:	U-Pass System Backend External Control	Backend for U-Pass system to be sectioned off to allow external control of lists (e.g., Providence, UAA).	S
126	IX. Maintenance and IT Featu	Wireless Data Transfer (Probing)	Wireless/Wi-Fi data transferring for the probing system.	S
127	IX. Maintenance and IT Featu	Wireless Data Transfer (Vaults)	Vaults and probing should be done via Wi-Fi to avoid physical probing.	S
128	IX. Maintenance and IT Featu	RFID Bus Passes	Bus passes that use RFID instead of Mag strips, as RFID passes are not inserted into the Farebox.	S
129	IX. Maintenance and IT Featu	Reduced Maintenance	Reduced maintenance and improved reliability with newer technology and materials.	S
130	IX. Maintenance and IT Featu	View/Troubleshoot Faults & Diagnostics	Ability to view and troubleshoot faults and diagnostic codes.	S
131	IX. Maintenance and IT Featu	Single Point Login (Avail to Farebox)	When an operator logs into Avail, they are automatically logged into the Farebox, and this integration should continue.	M
132	IX. Maintenance and IT Featu	Garage Data System Upgrade	An upgrade to the garage data system.	M
133	X. User Experience (UX) & Tra	Simple/Streamlined Rider UI	Simple, streamlined user interface for riders to purchase tickets.	S

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134 X.	User Experience (UX) & Tra	Driver-Facing Interface for Farebox Operation	Clear and user-friendly interface for drivers operating the farebox.	M
135 X.	User Experience (UX) & Tra	Self-Service Kiosk Option	Ability for self-service kiosk option for ticket purchase.	S
136 X.	User Experience (UX) & Tra	Staff Training: Account Management	Staff training on account management.	M
137 X.	User Experience (UX) & Tra	Staff Training: Fare Validation	Staff training on fare validation.	M
138 X.	User Experience (UX) & Tra	Staff Training: Reporting Tools	Staff training on reporting tools.	M
139 X.	User Experience (UX) & Tra	Rider Education	Rider education for new fare media and payment options.	M
140 X.	User Experience (UX) & Tra	Technician Training	Technician training for all major and minor components and systems involved.	M
141 X.	User Experience (UX) & Tra	Access to FTA/Local Reports Training	Training should be provided on how to access all required FTA and local reports.	M
142 XI.	Future Considerations	Support Microtransit Expansion	The new system should be able to support microtransit expansion.	S
143 XI.	Future Considerations	Support TNC Partnerships	The new system should be able to support TNC partnerships.	S
144 XI.	Future Considerations	Favorable to Cashless System	In favor of transitioning to a cashless system from a maintenance standpoint.	W
145 XI.	Future Considerations	Bus Replacement Add-ons for Equivalence	If there's an add-on that would make the Odyssey buses equivalent, that's what Peter wants.	C
146 XI.	Future Considerations	Second Device for Every Bus	For the second phase, every bus will get a second device.	C
147 XI.	Future Considerations	Service Contract/Tech Support	To have a service contract/tech support.	M