# Clipper® Executive Board

## Next Generation Clipper® Transition Plan and Overview

**Subject:**

Plan to transition current Clipper cardholders to the Next Generation account-based system, including an overview of the new features, functions, and capabilities of the account-based system and their availability.

**Background:**

**Account-Based Functionality at Start of Customer Transition**

At the October Clipper Executive Board meeting, Board members requested Clipper staff to prepare a summary of which account-based features will be available at the Start of Customer Transition. During the presentation of the slides in Attachment A to this memo, Clipper staff will discuss those features and functionality.

**Transition Overview**

During Customer Transition, all Clipper accounts, cards, value, passes, and products will migrate ("flip") from the card-based system to the Account-based C2 Back Office. At that point, Clipper staff expect all legacy equipment will be replaced with their Next Generation Account-based equivalents (excluding Customer Service Terminals), and new websites and portals for MTC, transit agency staff, and other third parties, including institutions and third-party benefit administrators, will be live (e.g.; Discount Program Management, Institutional and Transit Benefit Program Management, and Maintenance Management Portals). As a reminder, the original overriding next-generation Clipper goal was to provide as seamless of a transition as was possible for the current frequent Clipper user. The Transition Plan is intended to show how that goal was achieved, and to prepare the region to transition both **technically** and **operationally** for full-scale Account-based operations.

Once Customer Transition starts, Clipper staff will begin the process of migrating accounts from the C1 card-based back office to the new C2 Account-based back office and "flipping" cards (i.e.

the process by which a customer's current card-based media is converted to an account-based fare media, and corresponding card-based value, products, ride history, etc., are converted to account-based value, products, history, etc.).  There are two ways in which a customer's C1 media will be "flipped" to C2.

## 1. Customer-Initiated Transition

The first way is through entirely customer-initiated means.  At the Start of Customer Transition, all cards associated with a customer's C1 account will be flipped if a customer:

- Logs into the new C2 Account-based website;
- Logs into the new C2 Account-based mobile app; or
- Calls the new C2 customer service center.

Once a customer initiates these actions after the Start of Customer Transition, their Clipper card serial number (CSN) (as well as all other CSNs associated with their account) will be placed on a list.  A customer would then need to tap on a C2 device.

Once a card has been flipped, two years' worth of transaction data will automatically be migrated from the C1 back office to the C2 account.   There are some unique edge-case scenarios in which a customer's information or data may not initially be fully transitioned over and we are working with Cubic and our customer service center contractor, WSP, to minimize potential customer confusion or concerns.

## 2. Card-based to Account-based Back-end System Transition

The second way for customers to be transitioned is through the back-end system, whereby if a customer's profile, ride history, fare category, membership in institution, products, and other such characteristics matches a certain profile, then they are scheduled to be flipped. Initially, the Transition Plan calls for a small number of cards to be listed the first week, with the plan to quickly ramp up to 150,000 additional cards added to the list each day.  There are currently approximately 5M active cards in circulation, 1.5M unique cards used in a month, and 4M accounts. Most frequent Clipper card users will likely be flipped to C2 within the first 2-3 weeks. While we are expecting to complete all C1 card flipping in 1.5 to 2 months, however, we have allocated 3 months for this effort in our schedule.

**Clipper Card "Flip" Transition Prioritization**

As we continue to identify and target specific rider populations for flipping, we plan to obtain feedback and consensus for our approach with transit agency staff and will keep the Board updated and involved in any major decisions. Our current prioritization framework focuses on the following:

A. Customers in discounted fare categories

B. Customers who ride agencies with:

- different standard fares in C1 than C2

- different/new products in C2

- changed tap procedures (i.e. dual tap)

- different financial settlement in C2 (i.e. C1 operator groups)

C. Customers with common multi-operator products

D. Customers with frequent inter-operator transfers

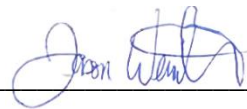E. Customers with new inter-operator transfer discounts

**Issues:**

None

**Recommendations:**

Information

**Attachments:**

- Attachment A: C2 Transition Overview and New Features and Functionality

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Jason Weinstein