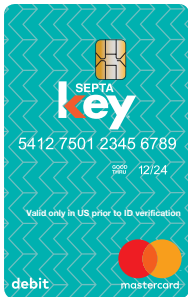


➤ UPass Program Guidelines

SEPTA key advantage



The Key Advantage UPass Program gives College/University students an affordable way to get to school, work, or around Philadelphia and its surrounding counties. Like any university resource, participating colleges and universities must offer the UPass to all eligible students regardless of whether students fully utilize the pass. Once a school enters an agreement with SEPTA, and eligible students enroll in Key Advantage UPass, a monthly all-access anywhere pass is loaded onto students' Key cards at the beginning of each active month of the program.

The all-access pass is valid at all times and on all services provided by SEPTA. The pass can only be used by the eligible student and cannot be shared or transferred to another person. There is a 240-ride limit per month.

The cost to the college or university for the program is based on the number of eligible students multiplied against the unit cost defined in the agreement. Schools can fully subsidize the cost of the program or, at their discretion, can assess a student fee allowing the program to be revenue neutral to the school.

School Eligibility:

Key Advantage UPass is available to all colleges and universities within SEPTA's service region. Schools can apply for the program [here](#).

Student Eligibility:

Participating colleges and universities must cover and include all eligible students within the defined student population and may not limit their student enrollment to students who opt-in or are known to be current SEPTA riders. Schools may choose the student population that they wish to cover based on the following categorical criteria:

- Enrollment status: Schools may make Key Advantage UPass available to students based on their enrollment status (full-time, part-time).
- Degree/Credential type: Schools may choose to make Key Advantage UPass available to students based on their degree type (undergraduate, graduate/professional, PhD, or some other certificate or credential).
- Class/Cohort: Schools may choose to take a phased approach, offering the program to first-year students and expanding to a new first-year student cohort each subsequent year.
- Campus location: colleges and universities with multiple campuses may make the Key Advantage UPass available to select campus locations located within the SEPTA service region.



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➤ UPass Program Guidelines



Eligibility Exemptions:

Within the defined student population, students may be excluded from the eligible student count for the following reasons:

- Students at campus locations that are outside of the SEPTA service area
- Students who are full-time remote
- Students participating in a semester-long exchange or study abroad where they will not be on campus for the semester

Colleges and universities must ensure that students meeting exemption requirements, do not have the opportunity to register for the program.

Student Eligibility Verification:

When schools apply to participate in Key Advantage UPass, they must supply SEPTA with enrollment counts. The following enrollment count information will be required:

- Student Population
 - Total enrolled students
 - Eligible segments of students (enrollment status, degree type, etc.)
 - Number of students included in the eligible population
 - Non-eligible segments of students
 - Number of excluded students

These student counts will need to be updated prior to each subsequent six-month contract, which may result in an adjustment to the school fees paid for the next contract term.

Rules for Use:

All-access passes received under Key Advantage UPass are nontransferable, nonrefundable, and can only be used by the eligible and participating student. Colleges and universities will need to update student policies to include Key Advantage UPass participation rules. Eligible students cannot share their all-access pass, even with other eligible students.

Colleges and universities can fully subsidize the cost of the program, or at their discretion can cost share with their students via a student fee. SEPTA recommends that the school implement a transportation fee as an offset to program costs.

SEPTA will track usage data of Key cards and flag accounts demonstrating any unusual activity.

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➤ UPass Program Guidelines



Pricing:

The UPass must be made available to all students within the eligible student population based on the eligibility criteria above. The price will be presented on a “per student” basis across the full eligible population.

Pricing for Key Advantage UPass will vary over time based on the observed usage data for each school. Through this approach, schools will ultimately pay for their usage levels, with the total cost reflected in that usage spread across the entire student population. SEPTA uses the lowest possible rate available when calculating usage fees. Contracts will be updated and renewed on six-month intervals.

➤ Usage-Based Pricing

The usage rates from the introductory period (see below) will be used to set a custom renewal price for each college or university for the subsequent six-month contract period. For the first contract renewal, the new price will be calculated based on the first 90 days of data. Following the first contract renewal, usage for the upcoming period will be based on 120 days of data for each college or university (the last two months of the previous period, and first two months of the current period). The following methodology will be applied to determine the usage-based price:

- Total transit and rail trips will be multiplied by SEPTA’s at cost per ride amount established from the prior year for each mode, inclusive of program overhead to cover administrative costs.
- A college or university’s average fare will be calculated based on utilization and contracted payment amount to compare to the baseline.
- If there is a fare increase for the fiscal year, the same percentage increase of the fare price will be applied to the previous year’s average fare. (For example: If the fare increases three percent (3%), the estimated average fare for the upcoming year will reflect a three percent (3%) increase.)
- The percentage change in the average fare comparison will determine the renewal pricing per pass per student. Factored into the calculation will be the number of eligible students in the contract period and the number of observation months. This methodology will derive a price per month for each college or university.
- This price per student will be applied to the duration of the renewal period, subject to the maximum and minimum pricing rules below, and will apply to the updated student population number for each college or university for the renewal period.

SEPTA will evaluate ridership and re-establish pricing for each participating college/university in this manner for each six-month renewal period. The six-month contract price will apply to the months within that period.

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➤ UPass Program Guidelines



➤ Introductory Price

The implementation of unique usage-based pricing for each college/university requires ridership data derived from an introductory participation period. Schools will be able to choose between two potential pricing models for the introductory six-month contract period:

- (1) a guaranteed introductory price, or
- (2) a usage-based price, implemented through a pre-payment amount and a subsequent reconciliation of charges with observed usage.

Invoice of at least \$15 per student per month with a second invoice not to exceed \$30 per student per month that reflects the actual usage rates of the student population.

➤ Option 1: Guaranteed Introductory Price

For the six-month introductory period, the price for Key Advantage UPass is \$25 per month for each month school is in session during the six-month introductory period (\$100 for a four-month semester, or \$150 for the full six months). This amount will be applied to the determined eligible student population to calculate the total cost of participation to each college or university. Following the six-month introductory period, the price will be updated for the renewal period to reflect observed usage following the method described above.

This price is calculated based on expected revenue recovery levels for SEPTA based on anticipated ridership. The introductory price will be updated periodically based on ridership trends and program data from existing participants.

➤ Option 2: Usage-Based Price: Pre-Paid Amount with Reconciliation

Colleges and universities have the option to choose to pay for their observed usage levels introductory period, as calculated under the formula described above. Institutions utilizing this option will make a pre-payment in a monthly amount of at least \$15 per student in advance of the activation of Key cards with the all-access pass. At the end of the six-month contract term, a reconciliation invoice will be sent that defines the actual usage cost relative to the pre-payment amount. Usage costs below the pre-payment amount will be credited to the school's account for the subsequent period. Usage costs above the pre-payment amount will be due to SEPTA in the reconciliation invoice, up to a total cap (inclusive of the pre-payment) of \$30 per student per month. This new price per eligible student becomes the rate for the next six-month term.

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➤ UPass Program Guidelines



Program Enrollment:

➤ Program Information and Application

Colleges or universities needing additional information or are interested in applying for Key Advantage UPass should visit: <https://www.jawntpass.com/keyadvantage>.

➤ Enrollment Process

Enrollment for Key Advantage UPass is ongoing.

Once a college or university is approved for Key Advantage UPass, SEPTA and the school will review student enrollment counts and determine the final number of eligible students. The school will need to set up any backend processes needed to participate, which can include running the program through an approved technology vendor that is included in the price of Key Advantage UPass. The college or university will provide SEPTA with bank account and routing numbers to facilitate the monthly payment drawn when the spreadsheet upload occurs.

SEPTA and the college/university will enter an Agreement which defines operational aspects of the program. The Agreement will include an Addendum A, which defines the current term and pricing. Once the Agreement is entered, only the Addendum will need to be updated every 6 months.

➤ SEPTA Key Cards

Students can use their existing Key card or purchase a new one, for Key Advantage UPass. Colleges and universities can choose to purchase Key cards in bulk for their students for \$4.95 per card by placing an order on the SEPTA Key portal. Cards must be ordered in multiples of 100 and would need to be distributed by the school in advance of the program start date.

Colleges and universities can also direct students to obtain their own Key card (\$4.95) at any SEPTA Fare Kiosk, SEPTA Sales Office or participating retail locations. If a student obtains their own Key card, the \$4.95 will be added to their Travel Wallet when they register their card at SEPTAKey.org (restrictions apply).

Lost or stolen Key cards can be reported either by calling the Key Customer Call Center at 855-567-3782 or by going online to SEPTAKey.org. Students will need to obtain a replacement card and register it to their existing account. They will then perform a card-to-card transfer to move the all-access pass and any Travel Wallet funds to their new card. Students will need to promptly supply the new Card Reference ID to their school's designated Transportation Coordinator (either internal to the school or through a third-party coordinator).



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➤ UPass Program Guidelines



➤ Contract Review

The introductory contract will be for the length of six months. SEPTA will review ridership data to calculate the renewal offer per the “Usage Based Pricing” model outlined above.

The subsequent six-month contracts will continue until there is a change to SEPTA Tariff #1, Tariff #132, or Tariff #154, which affects among other things, the price SEPTA charges for various fares and pass products. Contracts will be reviewed periodically for updated enrollment counts with SEPTA providing updated pricing, calculated based on ridership data analyzed during the preceding period. Renewal pricing levels will be provided for subsequent periods approximately three months before the end of the then contract period.

Colleges and universities are under no obligation to renew their participation in Key Advantage UPass beyond the contract period.

➤ Early Termination

Colleges and universities cannot terminate a contract early without paying the full amount of the contract prior to termination.

➤ Payment

Payments to SEPTA will be made monthly at the time the order is placed. If a college or university chooses the pre-paid option for the introductory period, a second invoice will be due following the introductory six-month period.

➤ Spreadsheet Upload

Each month, the college/university, or third-party transportation coordinator will upload the eligibility spreadsheet, in a format defined by SEPTA, to the SEPTA Key Portal. This file transmits the eligible student’s name and Card Reference ID and will trigger the loading of the upcoming all-access pass. The school will include all new eligible students and remove ineligible students from the list each month.

SEPTA will provide colleges and universities with a sample excel file for the upload. The file will need to include, at a minimum, the student name and Card Reference ID.

The upload file will, at a minimum, need to be loaded no later than the day before the first of each month during the current term.

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