# Table of Contents

1. **Preamble** .......................................................................................................................... 3
   1.1 Mission Statement ............................................................................................................ 3
   1.2 Objectives ........................................................................................................................ 3
   1.3 Structure .......................................................................................................................... 3
   1.4 Duties ............................................................................................................................... 3

2. **Confidentiality** .................................................................................................................. 4

3. **Role of the U-Pass Advisory Committee** ......................................................................... 4

4. **U-Pass BC Program Conditions** .................................................................................... 5
   4.1 U-Pass BC Side Agreement ............................................................................................. 5
   4.2 Eligible and Exempt Students ......................................................................................... 6

5. **Procedures for Customer Service** ................................................................................... 6

6. **Contacts** .......................................................................................................................... 9
   6.1 Alma Mater Society of UBC Vancouver ........................................................................... 9
   6.2 UBC Enrollment Services ................................................................................................. 9
   6.3 UBC Transportation Planning ......................................................................................... 10
1 Preamble

1.1 Mission statement

The mission of the AMS U-Pass Office is to provide a centralized location designated to provide information and assistance to the students of the University of British Columbia Vancouver campus (UBC) with U-Pass problems and concerns.

1.2 Objectives

The objectives of the AMS U-Pass Office are as follows:

• To provide a centralized location designated to respond to student questions and concerns;
• To provide information and assistance in a prompt and efficient manner;
• Respond to U-Pass BC related inquiries and customer service requests;
• To respond to requests in a timely fashion, but with thorough response;
• To address student issues concerning the Compass program and the U-Pass BC program as a whole;
• Help advise students on issues concerning fare-enforcement;
• Work with the university to adjudicate exemptions and service requests;
• Work with the AMS and UBC to communicate to all students on program details.

1.3 Structure

The AMS U-Pass Office shall be composed of:

• The AMS U-Pass Office Coordinator; and
• If deemed necessary by the U-Pass Office Coordinator and the Office of the Vice-President External Affairs:
  • U-Pass Office Assistance Coordinator; and
  • One or more Volunteers

1.4 Duties

The AMS U-Pass Office Coordinator shall:

• Oversee the daily operations of the AMS U-Pass Office;
• Oversee and manage all staff and volunteers of the AMS U-Pass Office;
• Maintain regular contact with the UBC U-Pass Coordination Office;
• Provide orientation, training, and professional development for all staff and volunteers of the AMS U-Pass Office;
• Write a transition report and provide training for his/her successor;
• Ensure that this Operations Manual is current and that all staff and volunteers are aware of the objectives and policies established in this Operations Manual;
• Prepare and administer a budget as approved by AMS Council;
• Be available and approachable to students by being present within the office, and providing prompt and friendly customer service;
• Report regularly to the VPX, and attend meeting with the VPX and/or the UBC U-Pass coordinator’s office.
• Report to the AMS Council as required;
• Foster relationships with relevant campus, community, and external individuals and organizations;
• Preserve recent records of operations and activities of the AMS U-Pass Office, including but not limited to: accurate statistics, staff and volunteer feedback, and client feedback;
• Maintain and uphold a standard of professionalism at all times;
• Ensure appropriate confidentiality in all aspects of service provisions;
• Attend services meetings once per week
  • Perform any other duties necessary for the operations and maintenance of the AMS U-Pass Office as required from time to time.

2 Confidentiality

The AMS U-Pass Office will have access to a large pool of student data; hence the office must maintain a due diligence of conserving the confidentiality of student information, and outlining details of the BC U-Pass Contract. The AMS U-Pass Office should seek written permission from a client before acting on the client’s behalf and before releasing personal and privileged information to a third party. Personal and private information includes, but is not limited to, documents such as client files and official reports not available to the public.

Under the *Freedom of Information and Protection of Privacy Act*, individuals have the right to review their personal files within a reasonable period of their request. Information from a confidential file will not be provided to a third party without written permission from the individual concerned. Furthermore, the names of third parties contained in a personal file must be blacked out before releasing a personal file in order to protect the third parties.

3 Role of the U-Pass Advisory Committee

The U-Pass Advisory Committee has been established in cooperation with other publicly funded post-secondary institutions who are participating in the U-Pass Program within Metro Vancouver and their respective student societies; with the intention to establish and oversee the following:

• The membership and structure of the Advisory Committee, and each subcommittee, as applicable;
• The frequency of meetings of the Advisory Committee, and each subcommittee, as applicable, which, for the Advisory Committee shall not be less than three meetings each calendar year;
• The role of each subcommittee; and
• The role of the Advisory Committee which will include:
  • Acting as liaison between TransLink and the post-secondary institutions and student associations participating in the U-Pass BC Program,
  • Monitoring the impact and effectiveness of the U-Pass BC Program in Metro Vancouver,
  • Review of U-Pass BC Program terms and development of recommendations for improvement, as approved through the decision protocols established by and through the Advisory Committee, on behalf of all post-secondary institutions and student associations participating in the U-Pass BC Program,
  • Consideration of potential contract amendments, as approved through the decision protocols established by and through the Advisory Committee,
• On behalf of all post-secondary institutions and student associations participating in the U-Pass BC Program, and
• Participation in planning efforts for electronic fare card implementation.

The U-Pass BC Office Coordinator will liaise with the Vice-President, External Affairs and provide quarterly service reports that outline the number of service requests, category of request, and demographic spread. The Coordinator will also attend meetings of the U-Pass Advisory Committee at the request of the Vice-President, External; the Vice-President, External will continue to be the primary AMS voting designate on the Committee. For contract renegotiations, the Vice-President, External Affairs will follow the procedures and regulations as established by Council, however, the Coordinator will be an advisor to the process.

4 U-Pass BC Program Conditions

The office will be provided with the most recent version of the U-Pass BC Agreement with TransLink. The contract outlines the legal terms that the U-Pass BC program operates under, and is the governing law that both the AMS and UBC follow when determining how to assist students with U-Pass BC related issues. The coordinators shall consult the contract for all issues related to U-Pass BC customer service.

4.1 U-Pass BC Side Agreement

From time to time, the AMS may have an agreement with UBC regarding contractual implications between the two bodies. This agreement will outline the criteria for adjudication for subsidies, and the rights and responsibilities of each party in the agreement. This agreement will also govern the operations of the AMS U-Pass BC office, and will also need to be consulted when assisting students.

4.2 Eligible and Exempt Students

Eligibility – It is a condition of the U-Pass BC Program that participation in the program is mandatory for all Eligible Students except for the limited exemptions described below:

• Eligible Students – In any U-Pass BC Term, the following students of the Post-Secondary Institution are Eligible Students for the applicable U-Pass BC Term:
  • All students:
    • Whose enrolment at the Post-Secondary Institution’s campuses in Metro Vancouver allows them to meet the following conditions during each month of the U-Pass BC Term:
      ▪ A full-time student enrolled in a Qualifying Educational Program or a part-time student enrolled in a Specified Educational Program, and
      ▪ With a course load totaling three or more credits or whose tuition fees, for the Academic Term coinciding with the applicable U-Pass BC Term, exceed the Total Fare Value, and
    ▪ Who are assessed Student Fees in respect of the Student Association; and
  ▪ All students whose enrolment at the Post-Secondary Institution’s campuses in Metro Vancouver allows them to be enrolled, for each month of the U-Pass BC Term, in any of the programs specifically identified under the heading “Opt-In Eligibility” in Schedule A for that particular U-Pass BC Term; and
  ▪ All students who are taking twelve (12) or more instructional hours per week in the following programs:
• Adult Basic Education ("ABE") programs,
• English as a Second Language ("ESL") programs, or
• English Language Services for Adults ("ELSA"), so long as the ABE, ESL or ELSA program in which the student is enrolled is approved and funded by the British Columbia Ministry of Advanced Education Innovation and Technology, the student is a member of the Student Association and the student is assessed Student Fees.

5 Customer Service Procedures

Students who are eligible to be excluded for the U-Pass BC Term:

• Do not reside in Metro Vancouver, and
• Are not enrolled in any classes offered by the Post-Secondary Institution which are conducted within Metro Vancouver;
• All students who are restricted from participation in the U-Pass BC Program pursuant to Program Integrity; and
• All students who are enrolled in any of the programs specifically identified under the heading “Opt-Out Eligibility” in Schedule A.

Mandatory Exemptions – Eligible Students who meet any one of the following criteria will be exempted from participation in the U-Pass BC Program by the Post-Secondary Institution and become an Exempt Student:

• Students who withdraw from the Post-Secondary Institution during the U-Pass BC Term, but such students only become Exempt Students as of the first day of the month following the month of withdrawal from the Post-Secondary Institution; and
• Students who are participating in a student exchange at another post-secondary institution outside Metro Vancouver in lieu of attending classes offered by the Post-Secondary Institution within Metro Vancouver;

Optional Exemptions – Eligible Student who meets any one of the following criteria may, upon request and in accordance with guidelines established by the Post-Secondary Institution in consultation with the Student Association, become an Exempt Student:

• Students who hold a valid U-Pass BC from another post-secondary institution within Metro Vancouver;
• Students who hold a Transit Pass that is valid for the duration of the U-Pass BC Term;
• Students who are permanently or temporarily disabled and whose physical or cognitive barriers cannot be accommodated by using the U-Pass BC Benefits; and
• Students who are exempted at the discretion of the Post-Secondary Institution due to special circumstances, provided that the total number of students exempted under this exemption shall not exceed one percent (1% or 470 students) of the number of Eligible Students.

Exemption Limit – The Post-Secondary Institution and the Student Association are restricted from granting exemptions to any Eligible Students who would otherwise qualify to become Exempt Students based on the criteria set out in sections Mandatory Exemptions or Optional Exemptions, if doing so would result in the total number of Exempt Students, exceeding the Exemption Limit.
In order to ensure that the Exemption Limit is not exceeded in a U-Pass BC Term, the Post-Secondary Institution and the Student Association each acknowledge and agree that, when considering which students qualify for an exemption the following priorities will be given to:

- Students who hold a valid U-Pass from another post-secondary institution;
- Students who hold a Transit Pass that is Valid for the duration of the U-Pass BC term;
- And students who are permanently or temporarily disabled, and whose physical or cognitive barriers cannot be accommodated by using the U-Pass BC benefits.

**Customer Service Procedures** – Customer service cases can be broken down to three separate streams. Stream one includes all opt-out/opt-in/exemption requests, stream two includes all general program questions and concerns, and stream three includes all extraordinary cases and concerns that are not addressed by the U-Pass BC agreement, or require additional attention.

Requests by any medium must be recorded using the online customer service module with:

- Student number;
- Full legal name;
- Year level and program;
- Contact information;
- Stream of request;
- Request content;

**Stream One** - Requests that require UBC Enrollment Services to adjudicate must be bundled into a daily report to be sent electronically to the UBC Enrollment Services via the U-Pass Exemption Office, and must include all information relevant to the request as provided by the student. Once a response has been received from UBC, the student must then be informed of the adjudication decision, and the customer service module must be updated.

**Stream Two** - Requests that do not require UBC Enrollment Services to adjudicate must be evaluated and logged into the customer service module no later than 72 hours after a request has been filed.

**Stream Three** - Requests that require UBC Transportation Planning to adjudicate must be bundled into a report and filed to the appropriate contact. Once a response has been received from UBC, the student then must be informed of the adjudication decision, and the customer service module must be updated.

**Appeals** - In the event that a student may wish to appeal, they may contact the AMS U-Pass BC office within one week after receiving their adjudication decision. The coordinator(s) may then bump the request to the next AMS U-Pass BC Administration Committee (UPASSCOM) meeting for adjudication. Once a decision has been made, that decision must then be logged and communicated to the student.

**Exemption Procedures** – Exemption cases are handled directly by UBC Enrollment Services via the Student Service Centre online system through the Financial Summary tab. Students may also go to upass.ubc.ca for more information.
In the event of extraordinary circumstances of a exemption request being denied, the Coordinator may choose to appeal the case on behalf of a student to UBC Enrollment Services through the U-Pass Exemption Office. Under the contract, UBC has the ability to optionally opt-out 1% of all eligible students (approx. 470 students), however, this category is used sparingly. The student must provide sufficient and significant rational behind their request for an exemption.

**Student Subsidies** – The *Financial Hardship Fund* administered by the AMS Finance Commission (FINCOM) has a dedicated component for U-Pass subsidies, which can cover either a full or partial subsidy. Students must provide proof of financial need, as determined by the U-Pass BC Side Agreement (See appendix), and submit their application as instructed by the Office of the Vice-President, Finance. FINCOM will then forward these requests to the AMS U-Pass BC Administration Committee (UPASSCOM) to adjudicate these cases, and determine eligibility. For students who are unsuccessful in applying for a U-Pass exemption, they may file for a financial subsidy; if they meet the criteria set by the U-Pass BC Side Agreement or have extraordinary circumstances that can be determined by UPASSCOM.

**Record Keeping and File Management** – The U-Pass BC Office Coordinator is responsible for record keeping in an organized fashion and should follow up with clients when deemed necessary. Proper record keeping includes the following:

- Ensuring that the customer service management system is continually updated with the status of all customer services cases including all relevant details on an individual case known to the Coordinator
- Maintaining an accurate record of clients, including all information necessary to process cases, and ensure that information is properly secured physically or digitally
- Maintaining a record of statistical data such as the client’s faculty, year of study, and how the student heard about the U-Pass BC Office
- Maintaining a series of feedback forms for clients, where results are tabulated and stored with the Coordinator
- Ensuring that all phone and email records are properly filed under the appropriate case categories

### Contacts

U-Pass Administration is handled between three bodies at UBC: the AMS, UBC Enrollment Services, and UBC Transportation Planning. Contacts and responsibilities are as below:

#### 6.1 Alma Mater Society of UBC Vancouver

Tanner Bokor  
Vice-President, External Affairs  
P: 604.822.205  
E: vpexternal@ams.ubc.ca

Responsibilities:

- External relations with TransLink and the U-Pass Advisory Committee
- Responsible for U-Pass contract negotiations
• Responsible for public transit file within the society
• Liaises with UBC departments about transit related issues on campus

Joaquin Acevedo
Vice-President, Finance
P: 604.822.3973
E: vpfinance@ams.ubc.ca

Responsibilities:
• All finances within the society
• Chair of FINCOM, and responsible for AMS Financial Harship Subsidies
• Communicates with UBC Enrollment Services about fee assessments
• Responsible for fee opt-in requests

6.2 UBC Enrollment Services

Jenny-Lee Walker
U-Pass Coordinator, U-Pass Exemption Office
P: 604.827.3053
E: jennylee.walker@ubc.ca

Responsibilities:
• All U-Pass exemption/opt-out requests
• All U-Pass subsidy assessments
• Determining and assessing fees according to U-Pass eligibility
• All departmental/program issues with U-Pass

6.3 UBC Transportation Planning

Michael Peterson
TREK Program Manager
P: 604.827.5252
E: Michael.peterson@ubc.ca

Responsibilities:
• All U-Pass BC program issues from UBC
• U-Pass negotiations on the UBC side
• Distribution of U-Pass cards and relations with TransLink from the UBC side
• Compass card implementation and operations