



California
Road Charge

Public Private Roads Project

APPENDIX

F

Customer Support Plan and Closeout

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Pilot Participant Customer Support Plan With End of Pilot Results

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1. Introduction

The California Road Charge Public/Private Roads Project Pilot (Pilot) was a six-month pilot running from April through September 2023, focused on the successful and accurate delineation between public and private lands, and rural, urban, and tribal geographic boundaries. A total of 288 participants took part in the Pilot.

The main pilot consisted of 253 participants from rural, tribal and urban communities in California. As part of the main pilot, a mini-pilot with 35 participants that were active accountholders with California’s Transportation Corridor Agencies (TCA) was conducted to explore how California’s tolling agencies might help administer a statewide road charge system.

This Customer Support Plan With End of Pilot Results provides an overview of how customer support functions were managed during the Pilot to support participants (referred to ‘participants’ or ‘customers’ throughout this document), as well as analyses discussing customer-service results.

2. Customer Service Framework

Participants accessed customer support throughout the Pilot for various reasons, including enrollment and onboarding assistance, reporting and calculation questions, monthly statement and incentive inquiries, technical support, and other issues and inquiries. Two progressive tiers of customer support were established to enable effective routing of participant inquiries:

- **Tier 1 Customer Support:** Administered by the pilot project team, Tier 1 Customer Support managed incoming participant inquiries and requests for customer support, resolved inquiries and requests where possible, and/or escalated inquiries and requests to Tier 2 Customer support as appropriate. Tier 1 support escalated issues that required further investigation or information from Caltrans or third-party providers (such as Danlaw, the plug-in reporting device provider).
- **Tier 2 Customer Support:** Tier 2 Customer Support consisted of third-party providers and Caltrans staff that were engaged with participant inquiries or issues that could not be resolved directly by the pilot project team. Tier 1 Customer Support coordinated with Tier 2 Customer Support entities through inquiry/issue resolution.

3. Tier 1 Customer Support – Main Pilot

Tier 1 Customer Support provided frontline customer support to pilot participants and served as the first point of contact for participants throughout the pilot, with the exception of TCA mini-pilot participants, which will be described in section 4. Tier 1 Customer Support was provided by the pilot project team (mainly the prime consultant, WSP) through a toll-free customer support hotline, an email address/inbox, and a participant portal.

Tier 1 Customer Support conducted an initial screening of customer support requests to determine the appropriate course of action. Tier 1 Customer Support sought first to resolve issues that could be addressed with available knowledge. These issues typically included explaining incentive payments and how to read simulated statements, web portal troubleshooting, questions related to

plug-in devices, and general customer support activities, such as physical address changes or email address changes.

3.1 COMMUNICATING WITH TIER 1 CUSTOMER SUPPORT

Participants contacted Tier 1 Customer Support through a toll-free customer support hotline, a dedicated email address and a participant portal.

3.1.1 Toll-Free Customer Support Hotline

The toll-free customer support hotline operated for the duration of the pilot. Calls to the toll-free customer support hotline were automatically routed to Tier 1 Customer Support members. The hotline operated from 9:00 AM to 5:00 PM Pacific Time, Monday through Friday, for the duration of the pilot, including the pilot closeout and incentive payment period following pilot operations close (with exclusions for [California state government recognized holidays](#)¹).

At least two members of the pilot project team were considered “on the floor” during hotline operating hours. Calls received outside of hotline operating hours were routed to the voicemail system, and the voicemail outgoing recorded message varied if the caller reached voicemail during or after operating hours. The pilot project team responded to voicemails within one business day.

3.1.2 Email Address /Inbox

The California Road Charge email address of info@caroadcharge.com was used for pilot participant customer support. Tier 1 Customer Support monitored the inbox daily for incoming participant support requests, as well as replies to open inquiries. Incoming support requests/emails were typically responded to within hours, or within one business day at the latest.

3.1.3 Participant Portal

Participants accessed a participant portal through the myMiles web platform. The portal allowed participants to view information on participation, account, vehicle, travel, monthly statement, and incentives. The portal also featured a support request form for participants to submit questions or requests for support, and these request form submissions were forwarded as emails to info@caroadcharge.com. Incoming support requests were responded to within hours, or one business day at the latest.

3.2 ESCALATION TO TIER 2

If Tier 1 Customer Support could not address particular issues, those issues were escalated to Tier 2 Customer Support.

¹ California State Government-recognized holidays: <https://www.calhr.ca.gov/employees/pages/state-holidays.aspx>

Depending on the specific nature of each issue, escalation to Tier 2 was directed either to Caltrans, a third-party provider supporting the pilot, or other stakeholders. Support requests escalated to Tier 2 were handled on a case-by-case basis. Escalations were sent via email or telephone based on the nature of the support request. Escalations included the necessary information, such as the participant's unique identifier, contact information, and support request status and notes, for Tier 2 Customer Support entities to appropriately address and resolve the request. Tier 1 Customer Support coordinated with the entity(ies) the issue was escalated to in order to track through resolution.

3.3 ISSUE TRACKING AND REPORTING

Tier 1 Customer Support managed customer support tracking and reporting. Upon receiving a request for customer service through the hotline, participant portal or email, Tier 1 Customer Support documented the interaction as a record in the customer support tracking system. The system assigned a unique case identifier to each request, documented the nature of the request made, and documented the resolution and/or ongoing support and communications to resolve the issue. The system was also used to support customer support status reporting to Caltrans through the Monthly Pilot Progress Reports.

3.4 SERVICE LEVEL REQUIREMENTS

Tier 1 Customer Support sought to maintain the following service levels:

- 95% of incoming hotline calls received during operating hours answered before routed to voicemail;
- Voicemails responded to within one business day;
- Emails responded to within one business day;
- Participant Portal support request form submission responded to within one business day; and
- Resolution (or escalation to Tier 2) of customer support issues and inquiries within three business days.

4. Tier 1 Customer Support – TCA Mini-Pilot

Those participating in the TCA mini pilot also were able to access the Tier 1 customer support hotline and email address as defined in the previous section. There are two main differences with how customer support is handled for TCA mini-pilot participants:

- **Participant Portal:** TCA mini-pilot participants did not use the myMiles website for their participant portal. TCA mini-pilot participants used a TCA-specific portal to view information on incentives (this portal was built by the prime contractor's development team). TCA mini-pilot participants also used a portal built by TCA to view trip information, monthly statements and to perform the review-and-pay activity.

- **Direct contact with TCA:** Given that TCA mini-pilot participants have an existing account and relationship with TCA, they were more likely reach out to TCA as their first point of contact for pilot participation inquiries or issues, rather than to the pilot project team Tier 1 Customer Support.

5. Customer Inquiries

Throughout the six-month Pilot, the customer support team fielded 342 total participant inquiries:

- 328 Tier 1 inquiries: these comprised the overwhelming majority of participant inquiries, accounting for between 90% and 100% of inquiries during each month of the Pilot.
- 14 Tier 2 inquiries: these constituted a very small number of participant inquiries, accounting for between 0% and 8% of inquiries during each month of the Pilot. Finally, these Tier 2 inquiries happened during the first three months of the Pilot as some participants encountered issues with plug-in devices.

These inquiries were grouped into eight main categories:

- **Enrollment:** questions on account setup, locating Vehicle Identification Number (VIN), plug-in device shipment/activation questions, and business partner enrollment steps.
- **Account:** questions about account information and access, issues accessing or using participant portal (e.g., forgot password), etc.
- **Device:** questions about device installation/activation, how device reports trip data to pilot system, device not reporting, etc.
- **Trips:** questions about travel data, mileage calculations, mileage or fuel discrepancies, road type differentiation, etc.
- **Statements:** questions about simulated monthly road charge statements.
- **Incentives:** questions about incentive-eligible activities, how to earn incentives, and incentive payments.
- **Survey:** questions related to initial or post-pilot survey, including issues accessing or completing survey.
- **General:** general participant inquiries and questions related to pilot and California Road Charge Program as a whole.

Table 1 categorizes each participant inquiry by inquiry type, by month.

Table 1: Participant Inquiry Types by Month

Inquiry Type	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	TOTAL
Account	10	22	10	16	3	24	18	7	110
Device	15	8	16	5	3	5	10	6	68
Enrollment	15	14	0	--	--	--	--	--	29
General	1	3	1	--	--	--	--	--	5
Incentives	2	18	14	21	20	19	16	28	138
Statements	--	5	10	3	--	--	8	5	31
Survey	2	4	0	--	--	--	5	4	15
Trips	4	7	2	2	15	--	--	--	30
TOTAL	49	81	53	47	41	48	57	50	426

One or more inquiry categories may be included in one Customer Inquiry.

5.1 MAIN PILOT PARTICIPANT INQUIRIES

Participants in the main pilot submitted the most inquiries about their account, devices and trips.

5.1.1 Tier 1 Inquiries

Throughout the Pilot, the customer support team handled 281 Tier 1 inquiries from main pilot participants, as shown in Table 2. This averages out to approximately 46 inquiries per month for the six-month Pilot.

Table 2: Main Pilot Tier 1 Participant Inquiries

Inquiry Type	Number of Inquiries
Account	71
Device	47
Enrollment	24
General	5
Incentives	90
Statements	9
Survey	6
Trips	29
TOTAL	281

5.1.2 Tier 2 Participant Inquiries

Throughout the Pilot, the customer support team handled 14 Tier 2 inquiries from main pilot participants, as shown in Table 3.

Table 3: Main Pilot Tier 2 Participant Inquiries

Inquiry Type	Number of Inquiries
Account	0
Device	5
Enrollment	2
General	1
Incentives	4
Statements	0
Survey	0
Trips	2
TOTAL	14*

* One Tier 2 inquiry occurred in March 2023

5.2 TCA MINI-PILOT PARTICIPANT INQUIRIES

TCA mini-pilot participants submitted the most inquiries about their account, incentives and statements.

5.2.1 Tier 1 and Tier 2 Inquiries

Throughout the Pilot, the customer support team handled 47 Tier 1 inquiries from TCA mini-pilot participants, as shown in Table 4. This averages to approximately eight inquiries per month for the six-month Pilot.

Table 4: TCA Mini-Pilot Tier 1 Participant Inquiries,

Inquiry Type	Number of Inquiries
Account	14
Device	5
Enrollment	5
General	0
Incentives	13
Statements	9
Survey	0
Trips	1
TOTAL	47

The Customer Support team handled one Tier 2 inquiry from one participant in the TCA mini-pilot; this inquiry was related to the Survey category.

5.3 ISSUE TRACKING AND REPORTING

The Customer Support team used several separate tools to track and report issues.

A web-based email platform, iMail, captured inquiries from participants. A separate web-based customer-service platform, Nextiva, was used to record inquiries. A different tool, NextivaONE, served as the platform to capture telephone calls from participants.

None of the tools were connected to each other, which meant that data was not automatically shared between them. As a result, recording inquiries relied on manual data entry. For example, when a member of the Customer Support team noticed an email inquiry, the team member created a case in the Nextiva web-based platform and manually entered information from the email (e.g., subject of participant's request and a summary of the request). The case could then be associated with a participant to record the participant's name, email address and other information, but this did not happen automatically when the case was created.

Team members could export data from the Nextiva platform to an Excel file, but because the Nextiva system did not have the capability to automatically classify inquiries (i.e., Account, Incentives, etc.), team members were required to manually classify the inquiries in the Excel file.

These challenges added to the time that Customer Support team members spent addressing inquiries.

5.4 SERVICE LEVEL AT END OF PILOT OVERVIEW

For the first four months of the Pilot, the Customer Support team averaged a 77% success rate of resolving Tier 1 inquiries within three business days, as shown in Table 5. For the last two months of the Pilot, the Customer Support team averaged a 38.5% success rate of resolving Tier 1 inquiries within three business days.

This decline was attributed to increasing complexity of participant inquiries, primarily related to incentive payments and the use of Visa cards. Given the way that the Visa gift cards worked, there was a certain level of difficulty built into the method required to redeem the gift cards, which led to quite a few frustrated participants.

Paying out incentives on a monthly basis instead of at the end increased the number of hours required to support the incentive program. These extra hours were spent facilitating the incentive payouts, answering questions on how to redeem the incentives, and tracking and managing the association of the activities to the incentives.

Turnaround time for support from Giftogram also presented challenges for the Customer Support team, as did a lack of timely communication from some participants.

Table 5: Tier 1 Inquiry Resolution

Month	Total Tier 1 Customer Inquiries	Inquiries Resolved within 3 Business Days	Percentage of Issues Resolved within 3 Business Days	Inquiries Resolved 4+ Days or Pending Resolution	Percentage of Issues Resolved 4+ Days or Pending Resolution
April 2023	49	33	67	12	24
May 2023	81	69	85	5	6
June 2023	53	38	71	11	20
July 2023	47	40	85	7	14
August 2023	51	15	29	36	70
September 2023	47	23	48	24	51
TOTAL	328	218	66	95	28

For the first three months of the Pilot, the Customer Support team averaged a 25% success rate of resolving Tier 2 inquiries within three business days, as shown in Table 6. This was attributable to the complexity of working with third parties, especially relating to issues with devices and incentive payments.

Table 6: Tier 2 Inquiry Resolution

Month	Inquiries Escalated (to Business Partner or Caltrans)	Inquiries Resolved within 3 Business Days	Percentage Resolved Within 3 Business Days	Inquiries Resolved 4+ Days	Percentage Resolved 4+ Business Days
April 2023	4	0	0	4	100
May 2023	8	2	25	6	75
June 2023	2	0	0	2	100
July 2023	0	0	0	0	0
August 2023	0	0	0	0	0
September 2023	0	0	0	0	0
TOTAL	14*	2	14	12	85

* One Tier 2 inquiry occurred in March 2023

6. Post-Pilot Inquiries

The Customer Support Team fielded a significant number of inquiries after the six-month Pilot closed. During October and November 2024, 107 inquiries were submitted to the Customer Support Team. It is highly recommended that a customer support team be kept active after the conclusion of any future road charge pilots to address participants’ questions.

6.1 POST-PILOT INQUIRIES, MAIN PILOT

Participants in the main Pilot submitted 96 inquiries, as shown in Table 7.

Table 7: Summary of Post-Pilot Inquiries, Main Pilot

Inquiry Type	Number of Inquiries
Account	23
Device	16
Enrollment	0
General	0
Incentives	37
Statements	13
Survey	7
Trips	0
TOTAL	96

6.2 POST-PILOT, TCA MINI-PILOT

Participants in the TCA Mini-Pilot submitted 11 inquiries, as shown in Table 8.

Table 8: Summary of Post-Pilot Inquiries, TCA Mini-Pilot

Inquiry Type	Number of Inquiries
Account	2
Device	
Enrollment	
General	
Incentives	7
Statements	
Survey	2
Trips	
TOTAL	11