



California
Road Charge

APPENDIX L: **Participant Agreement**

CALIFORNIA ROAD CHARGE FOUR PHASE DEMONSTRATION

Participant Agreement

- 1. Participation:** I am participating in the California Road Charge Phased Demonstration, a research project operated by the California Department of Transportation (“Caltrans”) and its designees to explore the technical feasibility of assessing a road charge on various transportation business service models and technology platforms. Caltrans and its designees are herein referred to as the “Demonstration Team”.

I agree to participate in one of the four phases of the demonstration. I acknowledge that more information on each of the four demonstration phases can be found at: http://caroadcharge.com/pdf/participants_flyer_fall2020_v3.pdf.

Based on my selected phase, I will be assigned a Business Partner to manage my participant account, collect needed travel data, and assess simulated road charges. Depending on the demonstration phase in which I participate, I may be assigned one or more Mileage Reporting Options (“MRO”) to support the collection of needed travel data.

I will participate for the duration of my selected demonstration phase, unless terminated earlier by the Demonstration Team. The Demonstration Team reserves the right to terminate my participation in the demonstration if I:

- Do not agree to the Participant Agreement
- Do not agree to additional Terms and Conditions presented by my assigned Business Partner required to participate in the selected phase;
- Do not complete the enrollment process and activate my assigned MRO within one (1) month of the start of the selected demonstration phase;
- Tamper with a MRO; or
- Intentionally report false mileage data or other required information.

- 2. Enrollment:** I will receive and follow the instructions provided by the Demonstration Team for completing the enrollment and onboarding process with my assigned Business Partner.

- 3. Reporting and Account Management:** I am responsible for establishing my demonstration account, enrolling with a business partner (as directed by the Demonstration Team), downloading any necessary applications (apps) or installing necessary hardware, and activating any required participant accounts within one week of receiving my assigned demonstration phase and sign up instructions.

I am responsible for notifying the Demonstration Team of any issues that may affect my participation in the demonstration.

- 4. Statements and Simulated Payments:** I will receive periodic statements of my simulated road charge owed. I am not responsible for making actual road charge payments. I will follow instructions from my assigned Business Partner to simulate payment of my road charge. I am responsible for paying for any services needed to participate in and complete the demonstration, as directed by the Demonstration Team and/or my preferred partner. I acknowledge that I will not be reimbursed for these services by the Demonstration Team. These services may include:

- For Phase 1 Fuel Pump participants, completing at least one (1) Fuel Purchase each month of the demonstration, up to five (5) total using the prescribed technology and payment mechanisms and paying for any outstanding fees or balances
- For Phase 1 Electric Vehicle Charge Point participants, completing at least one (1) Electric Vehicle Charging Session each month of the demonstration, up to five (5) total, using the prescribed technology and payment mechanisms and paying for any outstanding fees or balances
- For Phase 2, Usage Based Insurance participants, completing at least one (1) regularly scheduled odometer picture upload each month of the demonstration, up to five (5) total using the prescribed technology mechanism.
- For Phase 3 participants, completing at least five (5) rideshare trips including paying any assessed Ride hailing Fees using the using the prescribed technology and payment mechanisms and paying for any outstanding fees or balances

- For all Phases, pay any assessed Preferred Partner Service Fees as identified by the demonstration team
5. **Opinion Research:** Over the course of the demonstration, I may be asked by Demonstration Team members to participate in surveys, focus groups, or opinion polls. I will participate in these events and notify the Demonstration Team members of any issues or conditions that may limit my participation. Participation may include, but it is not limited to, providing opinions on road charge demonstration services, providing opinions on road charge, assessing the performance of my demonstration business partner and customer service entity, and providing unbiased feedback to Demonstration Team members or their designees as to my participation in the California Road Charge Phased Demonstration.
 6. **Account Closure:** Upon completion of the demonstration, I will deactivate my participant account, and also return all demonstration hardware, close all demonstration accounts, and pay all amounts owing for unpaid services, in accordance with the terms of this Agreement. I will complete these activities no more than two weeks after the end of my Demonstration Phase.
 7. **Privacy and Protection of My Information:** My personally identifiable information is protected by the Demonstration Participant [Privacy Policy](#).
 8. **Copy of this Agreement:** I may obtain a copy of this Participant Agreement at any time by submitting a request to the Demonstration Support Team.

From: [California Road Charge Demonstration](#)
To: info@caroadcharge.com
Subject: Don't forget to enroll in the CA Road Charge Demonstration!
Date: Wednesday, January 20, 2021 12:04:51 PM

EXTERNAL EMAIL. Links/attachments may not be safe.

Hi!

Just a reminder that you've been invited to participate in the [pay-at-the-pump \(PATP\)](#) portion of the California Road Charge Demonstration Phase 1!

To start your enrollment process, the first step is to log into the secure Demonstration Participant Portal to learn more about participating in the demonstration and completing your enrollment.

On January 14th, we sent you a separate email from info@caroadcharge.com with your Participant Portal login credentials. *If you are unable to find the email (don't forget to check your spam folders!), let us know and we can send out another one.*

Once you log into the Participant Portal and acknowledge the Participant Agreement, you can read more about participation steps and requirements for the pay-at-the-pump phase and complete your enrollment!

If you have any questions, please reach out to us at info@caroadcharge.com

Sincerely,

The Road Charge Demonstration Team



California Road Charge



Fair. Transparent. Sustainable.

A road charge is a new way of paying for our state's transportation needs. It works by charging drivers based on how much they travel. There are lot of ways of doing this and the California Road Charge Demonstration will help the State see how well each of these options could work.

Four options to be tested with a road charge:

Phase 1: Pay-at-the-Pump/Charge Point

The pay-at-the-pump /charge point (PATP/CP) approach involves testing technologies that would allow drivers to pay their road charges at fueling and electric vehicle charging stations. Of all the options being tested, it is the one that is most like how everyone already pays their fuel taxes.



Phase 2: Usage Based Insurance

The usage-based insurance (UBI) approach involves testing road charge payment in conjunction with insurance policies based on how much you drive. Such policies are an increasingly popular option for people who might not drive that much and would benefit from a "pay-as-you-drive" approach to vehicle insurance. Much of the data used for these policies can also be used for road charge assessment.



Phase 3: Transportation Network Companies

The transportation network companies (TNC) approach involves testing road charge payment in conjunction with ride hailing services that are growing in popularity as an alternative to driving your own vehicle. TNC services typically use a smartphone app that allows users to request a ride from available drivers who are in the area. Payment for these services is handled through the app. Much of the data used by TNCs can also be used for road charge assessment.



Phase 4: Autonomous Vehicles

The autonomous vehicle (AV) project phase will not have any participants. An AV partner will provide the research team with data from one of their AVs operating in California to see how information from an AV could be used to assess a road charge.



	PHASE 1: PATP/CP	PHASE 2: UBI	PHASE 3: TNC	PHASE 4:AV
Demonstration Length	January-June 6 months	February-June 5 months	March-June 4 months	April-June 3 months
Reporting Method	Plug-in device and mobile app	Odometer photo upload to website	Mobile app	In-vehicle technology
Reporting Frequency	Weekly	Monthly	Every Ride	No participants



Interested in participating?

The first step is to fill out the information requested on the California Road Charge website: <http://www.caroadcharge.com/engage/contact-us/>. The Project Team will select participants from the pool of interested parties towards the end of this year. If selected to participate, you'll receive information on how to enroll and get started.

Note: During the six-month demonstration, you will be required to take a few surveys and you may also be asked to participate in a focus group.



Starting in January 2021, California will test how Road Charge can work with four technologies: usage-based insurance, ridesharing, electric vehicle charging stations/pay-at-the-pump systems, and autonomous vehicles. Participation in the upcoming demonstration project can help California develop a fairer, more transparent and more sustainable way to fund California's transportation network. [Learn more about each demonstration phase >>](#)

Frequently Asked Questions About Participation

What are you trying to learn from this demonstration project?

This demonstration is designed to evaluate how a Road Charge system could be deployed across unique technology platforms. We're working to assess how easily these systems can help report mileage driven, how data could be used to collect a road charge, and how easy they are for people to use and understand.

What is the ideal participant profile?

All participants must be California residents age 18 or older. Beyond that, we want to make sure any Road Charge system could work for all Californians, so we want our participants to reflect the wide diversity of the state. If you participate in a phase that requires a vehicle, you must have your own vehicle, have a current valid driver's license and insurance, and be able to purchase fuel or charging sessions. You will also need to establish an account with one of our service providers, which may require having a valid credit or debit card and a smartphone with which to download the demonstration apps.

Do I need to own or lease a car to participate?

No! If you live or work in West Sacramento - the geographic region of our Transportation Network Company (ridesharing) phase - then your participation simply requires that you sign up for the City's ridesharing program and take at least five rides over the course of the demonstration.

However, if you participate in a phase where you use your vehicle (pay-at-the-pump/electric charging station and usage-based insurance) we ask that you use the same vehicle for the duration of the demonstration, have access to your vehicle's diagnostics port, and fuel or charge your vehicle at least once per month over the course of the demonstration.

What type of information will be collected?

It depends on the phase you sign up for. For the pay-at-the-pump/electric charging station phase, the demonstration research team will collect information on the number of miles traveled, how much fuel your vehicle consumes, and whether the vehicle is traveling inside or outside the State of California. Caltrans will not know who that vehicle belongs to or where the vehicle is specifically located at any given time. Further, all personally identifiable information used to enroll in the demonstration (name, address, phone number, email, etc.) will be removed from records and not provided to the State.

How will the demonstration data be safeguarded?

The technology partners and platforms used for the demonstration have all undergone strict testing and security certifications, similar to those required by credit card companies and the banking industry. These standards require the strictest of security protocols and data encryption measures to protect all data being collected during the demonstration.



Fair. Transparent. Sustainable.

Will I have the chance to try out a driverless car?

Not through this demonstration; the Automated Vehicle phase will not include any participants.

Can I sign up for more than one demonstration phase?

To maximize the number of participants, we are restricting participation to only one phase.

What's the time commitment for participating?

Our goal is to make your involvement in this demonstration as easy and convenient as possible. There will be a nominal time commitment to setup your account, monitor your simulated road charges, complete demonstration activities, complete participant surveys and discussions, and close out your account. We don't expect these efforts to take more than a few hours over the course of the demonstration. Also, much of the involvement in the demonstration will include things you may already be doing, such as driving, buying fuel, charging your electric vehicle, or using rideshare services.

Will I be compensated for my time or reimbursed for my mileage?

Participants will be eligible for incentives up to \$100 for their time and participation in their selected phase. This

may include setting up your account, taking a certain number of trips, completing fuel or electric charge purchases, completing surveys, taking and uploading pictures of your odometer, and closing out your account at the end of the demonstration. Specific details on the tasks for each phase, as well as the incentive payouts for certain activities, will be provided if you're selected to participate.

Will I actually have to pay the Road Charge fees assessed during the demonstration?

No. All road charges assessed during the demonstration are simulated; no road charge fees will be collected from participants. You will still need to pay for your regular gas purchases, electric vehicle charging sessions, and any ridesharing trips you take using the demonstration partners. Funds to help cover some of these purchases may be prepaid by the demonstration team as part of incentive payouts.

What if I am not selected for participation in the demonstration? Will there be another opportunity?

Even if you are not selected to participate, there are still other ways to share your views about a potential Road Charge program. Visit our website www.caroadcharge.com/engage/ to fill out our Road Charge survey, share your comments and concerns about the program, and sign up for our quarterly newsletter to learn about future demonstration opportunities.

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