



# Appendix B

## Taxi Upfront Fare Pilot Application Form For Third-Party Pilot Trips

November 1, 2023

The Taxi Upfront Fare Pilot Program allows taxi E-Hail application (Taxi E-Hail App) providers to offer taxi customers the ability to book a taxi trip and pay a flat rate upfront fare, instead of paying the Taximeter amount at the end of the trip.

The Pilot also allows Taxi E-Hail Apps to dispatch trips that originate with third-party entities (e.g. entities that do not receive permits issued by the SFMTA), which may offer upfront fares that are not based on Taximeter rates.

**Third-Party Pilot Trips<sup>1</sup>** have the following characteristics:

- originates with a customer ride request through a third-party entity (Third-Party Provider)
- transferred to a Taxi E-Hail App
- dispatched by a Taxi E-Hail App
- provided by a permitted San Francisco taxi driver in a permitted SF taxi vehicle
- upfront fare is **not** required to be based on the estimated Taximeter amount

The SFMTA will review completed applications and determine whether each applicant meets the SFMTA’s requirements to provide Third-Party Pilot Trips, as established in the November 1, 2023 [Taxi Upfront Fare Pilot Program updated memo](#). An applicant must be SFMTA-approved for Taxi Pilot Trips in order to be considered for approval for Third-Party Pilot Trips.

### Applicant Information

<b>Please Print Clearly</b>			
<b>Taxi E-Hail App Business Name:</b>		Business Phone:	
Contact Person:		Phone:	
Mailing Address:			
Street Address if different than above:			

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<sup>1</sup> Any capitalized terms that are not otherwise defined herein shall have the meaning ascribed in the August 5, 2022 Taxi Upfront Fare Pilot Program memo.

<b>Affiliated Dispatch Service Business Name:</b>		Business Phone:	
Contact Person:		Email:	
<b>Affiliated Dispatch Service Business Name:</b>		Business Phone:	
Contact Person:		Email:	

<b>Affiliated Color Scheme:</b>		Business Phone:	
Contact Person:		Email:	
<b>Affiliated Color Scheme:</b>		Business Phone:	
Contact Person:		Email:	
<b>Affiliated Color Scheme:</b>		Business Phone:	
Contact Person:		Email:	
<b>Affiliated Color Scheme:</b>		Business Phone:	
Contact Person:		Email:	
<b>Affiliated Color Scheme:</b>		Business Phone:	
Contact Person:		Email:	

<b>Third-Party Business Name:</b>		Business Phone:	
Contact Person:		Email:	
<b>Third-Party Business Name:</b>		Business Phone:	
Contact Person:		Email:	

## Submission Instructions

Applications are evaluated on a rolling basis. By submitting an application, applicants acknowledge that they have read and understand the [Pilot rules](#) and, if approved, agree to comply with such rules. A completed application must include all application materials specified below to demonstrate an applicant’s ability to comply with all corresponding Pilot rules.

Submit completed application form and required application materials by email to [SFTaxi@sfmta.com](mailto:SFTaxi@sfmta.com) with the subject: “Upfront Fare Pilot Program Application: Third-Party Pilot Trips.”

## Application Agreement

<b>By signing this application, the applicant verifies on behalf of itself, and any affiliated Third-Party provider, that all the information provided is true and accurate and agrees that if approved, the applicant will comply with the Pilot rules and requirements, as they may be updated from time to time.</b>	
Name of Applicant	
Signature of Authorized Representative	
Printed Name, Title and Date	

<b>By signing this application, the undersigned Dispatch Service agrees, if the application is approved, to comply with the Pilot rules and requirements, as they may be updated from time to time.</b>	
Name of Dispatch Service	
Signature of Authorized Representative	
Printed Name, Title and Date	

## Application Materials

Applicants seeking participation in the Upfront Fare Pilot Program to provide Third-Party Pilot Trips shall submit the following information:

- 1) Program Description: Written description of the applicant team (E-Hail App, Dispatch Services, Color Schemes and Third-Party partners), and its plan to offer Third-Party Pilot Trips. The program description must include the following:
  - a) Written evidence that each affiliated Dispatch Service, Color Scheme and Third-Party partner agrees to participate in the Pilot.
  - b) Describe how Third-Party Pilot Trips will work from a customer perspective.
  - c) Describe how Third-Party Pilot Trips will work from a taxi driver perspective and include description of any associated taxi driver training program.
  - d) Describe how drivers will be able to opt-out of servicing Third-Party Pilot Trips.
  - e) Submit sample images of how the upfront fare offer will be communicated to both customers and taxi drivers (e.g. what will the customers and taxi drivers see on the app).
  - f) Describe the plan to ensure that traditional taxi trips, including Paratransit taxi trips, will continue to meet the response time goals specified in Section 1102 of the Transportation Code, including any driver incentive and/or recruitment plans.
  - g) Describe plan to meet demand for Third-Party Pilot Trips, including any driver incentive and/or recruitment plans.

- 2) Submit the schedule of fees charged to drivers for Third-Party Pilot Trips or report the weighted average driver fee to SFMTA on a monthly basis no less than 7 calendar days after the end of each month.
- 3) Submit proof that the required Third-Party Pilot test data has been successfully submitted to SFMTA's taxi APIs and has been validated by SFMTA staff.

## Staff Evaluation

Staff will review each application for completeness and responsiveness in the evaluation process and will provide written determination as to whether an applicant has demonstrated an ability to meet the Pilot application requirements. SFMTA staff may request additional information or clarification of information already provided from applicants and may provide an applicant the opportunity to revise or modify its application.

Date Application Received: \_\_\_\_\_

Staff Reviewer: \_\_\_\_\_

Evaluation checklist:

- The Taxi E-Hail App has been approved by SFMTA to provide Taxi Pilot Trips
- Applicant has submitted all required information included in Items 1 and 2 above
- Applicant has submitted required test data to SFMTA's taxi APIs
- Staff has validated that the Third-Party Pilot test data has been received and complies with SFMTA's requirements
- Applicant has demonstrated an ability to comply with all Pilot rules established in the August 5, 2022 [Taxi Upfront Fare Pilot Program memo](#)