

**Joint Board Meeting
April 8, 2019**

Briefing: Approved Business Rules Update

Purpose: To advise the ORCA Joint Board of the status business rule updates and new business rule developments that occurred in first quarter 2019.

Decisions Required: None

Summary: There were no business rule updates that require Joint Board action. This update includes nine (9) next gen ORCA business rules and identifies three (3) Legacy ORCA business rules that will not be needed in the new system.

next gen ORCA business rules

The language for the below nine business rules was modernized/updated from their original sources. There were no substantive changes to the content of the rule. The Business Managers/Site Managers were the “approving body” for these approved rules.

NBR No.	NBR Title
001	Transfer rules for E-purse
002	Transfer rules for Cash Riders
010	Human Services Agency Qualifying Criteria
011	Human Services Agency Program
013	RRFP Data Field for Approving Physician
016	Transit Employee Dependent Passes
022	Passback protection
026	Unused day passes
029	Sales availability rules for passes

Eliminated Legacy ORCA business rules

Three (3) Legacy ORCA business rules were identified as not be required in the new system either due to being obsolete in existing system or due to efficiencies in new system.

2nd Quarter Plan

Twenty-two (22) business rules are currently in work.

Approval Criteria: As agreed by the ORCA Joint Board, the following table describes the breakdown of the types of rules that will be approved by each body:

JB	Joint Board action will continue to be required for business rules pertaining to regional policies or to the ORCA regional budget.	<ul style="list-style-type: none"> • Card fees • Negative value • ORCA card data request policies
OSC	The OSC may approve those business rules that are related to the scope of the program.	<ul style="list-style-type: none"> • Pass revenue allocation • Account balance transfers
Business Managers	Business Managers may approve those updated or modernized legacy ORCA rules that have no substantive change.	<ul style="list-style-type: none"> • Age verification process • Transit Employee Dependent Passes • Check acceptance