Rail Transit System Station Procedures

Abstract: This Recommended Practice describes recommended elements of the duties and responsibilities of rail transit system station personnel, including monitoring performance, safety, security, customer relations, service assistance, station inspection for safety and cleanliness, revenue procedures, station features, and station opening and closing procedures.

Keywords: safety, security, station, station agent, station operations, station personnel, training

Summary: Rail transit system stations and the personnel who work in them set the stage for customers’ transit experiences. The service and treatment customers receive in stations are influential in developing customer loyalty. Station personnel should strive to relate to customers in a helpful and pleasant manner. It is also important for station personnel to be alert and vigilant for suspicious or unusual activity and behavior and to report unusual behavior through prescribed methods. Customer relations for station personnel involves a broad range of activities including, but not limited to, interactions between station personnel and customers; provision of travel information; provision of service to disabled customers; public address announcements; and responses to emergency situations. Station personnel also play roles in addressing the correction of poor housekeeping conditions, hazards or other repugnant conditions (e.g., graffiti). Station personnel are often involved in practices to ensure revenue procedures are adhered to and that problems arising from these transactions are properly resolved.

Scope and purpose: This Recommended Practice outlines the basic features of a rail transit system’s station personnel program. The purpose of a station personnel program is to optimize the customers’ safety, security and satisfaction. This document is therefore intended to provide a basis to ensure consistent station personnel performance.
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Introduction

This introduction is not part of APTA RT-OP-RP-009 First Revision MMM DD, 2014, Recommended Practice for Rail Transit System Station Procedures.

Many rail transit systems have personnel assigned to their stations. In some instances, the station personnel are directly involved in the collection of revenue. Rail transit system stations and the personnel who work in them set the stage for customers’ transit experiences. The service and treatment that customers receive in the stations are influential factors in developing customer loyalty.

Station personnel should strive to relate to customers in a helpful and pleasant manner. It is also important for station personnel to be alert and vigilant for suspicious or unusual activity and behavior and to report unusual behavior through prescribed methods.

Customer relations for station personnel involve a broad range of activities such as, but not limited to: interactions between station personnel and customers; provision of travel information; provision of service to disabled customers; public address announcements; and responses to emergency situations.

Station personnel shall also play roles in addressing the correction of poor housekeeping conditions, hazards, or other repugnant conditions (e.g. graffiti). Station personnel are often involved in practices to ensure revenue procedures are adhered to and that problems arising from these transactions are properly resolved.

This recommended practice represents a common viewpoint of those parties concerned with its provisions, namely transit operating/planning agencies, rail transit systems, manufacturers, consultants, engineers and general interest groups. The application of any recommended practices contained herein is voluntary. In some cases, federal and/or state regulations govern portions of a rail transit system’s operations. In those cases, the government regulations take precedence over this recommended practice. APTA recognizes that for certain applications, the recommended practices, as implemented by individual rail transit systems, may be either more or less restrictive than those given in this document.

APTA recommends the use of this recommended practice by:

- Individuals or organizations that operate rail transit systems;
- Individuals or organizations that contract with others for the operation of rail transit systems; and
- Individuals or organizations that influence how rail transit systems are operated (including but not limited to consultants, designers and contractors).

Note on alternate practices

Individual rail transit systems may modify the practices in this recommended practice to accommodate their specific equipment and mode of operation. APTA recognizes that some rail transit systems may have unique operating environments that make strict compliance with every provision of this recommended practice impossible. As a result, certain rail transit systems may need to implement the recommended practices and practices herein in ways that are more or less restrictive than this document prescribes. A rail transit system may develop alternates to APTA recommended practices so long as the alternates are based on a safe operating history and are described and documented in the system’s safety program plan (or another document that is referenced in the system safety program plan).
Documentation of alternate practices shall:

- Identify the specific APTA rail transit safety recommended practice requirements that cannot be met.
- State why each of these requirements cannot be met.
- Describe the alternate methods used.
- Describe and substantiate how the alternate methods do not compromise safety and provide a level of safety equivalent to the practices in the APTA safety recommended practice (operating histories or hazard analysis findings may be used to substantiate this claim).
Rail Transit System Station Procedures

1. Monitoring station personnel performance

The job performance of station personnel should be monitored in order to ensure performance in accordance with training and expectations. It is especially important that rail transit systems (RTSs) develop and utilize methods and techniques of monitoring station personnel, as station personnel primarily work without direct supervision and play salient roles in the provision of customer service.

Sometimes these monitoring requirements may be accomplished by remote means, such as using telephones for notification purposes for reporting to work. These monitoring requirements can be optimally achieved by an RTS employing a designated supervisory/managerial staff to monitor the station personnel’s job performance in stations.

Each RTS should determine the composition of its monitoring staff depending on the complexity and characteristics of its system. The qualities of the station personnel monitoring staff are also dependent on the particular manner and frequency that each system determines is appropriate to monitor its station personnel—e.g., how many times a day or week a station or employee is monitored and for what purposes.

This section discusses critical topics of station personnel job performance, which should be monitored.

1.1 Reporting for duty

The RTS should require station personnel to report to their work location(s) as scheduled, including logging out and logging back in for lunch breaks, etc., during the scheduled shift. The RTS should develop and implement a methodology that monitors station employees in this regard. This is especially important, as station personnel often open rail stations at the beginning of the operating day to allow initial customer access.

Also, the RTS should have an absence notification procedure for station personnel to report when they will be unable to report to work as scheduled; this system should provide the agency sufficient time to supply an employee for the station.

1.1.1 Monitoring reporting for duty

RTSs should consider developing a means of monitoring station personnel reporting for duty. The means of monitoring could include telephone, electronic (revenue equipment), manual logs, supervisory presence or radios to record station personnel reporting for duty.

1.1.2 Station personnel relieving each other

The RTS should establish a process whereby on-duty station personnel share or communicate pertinent information to the station personnel relieving their duty on the next shift.

At times, station personnel relieve other on-duty station personnel who are already working in stations. The RTS should implement a procedure that defines what the on-duty station employee is to do when the relieving station person is late or fails to report. This procedure should address when and how the on-duty station person is to notify a designated authority that his or her relief is late. This procedure should also have a contingency defining what the on-duty station personnel are to do to ensure that the station is properly staffed.
1.2 Employee schedule compliance
The RTS should have a means of monitoring that station employees adhere to prescribed schedules after reporting to work.

1.3 Fitness and preparedness for duty
It is essential that station personnel are prepared for and perform their assignments in accordance with the RTS’s procedures and policies. RTS procedures and policies should encompass procedures for fitness for duty and other requirements, such as PPE, clothing, identification badges, tools, and documents or manuals.

1.4 Policies on various station personnel activities
Due to the uniqueness of station personnel working conditions, the RTS should have policies and procedures for station personnel. These policies and procedures may include, but not be limited to, the use of personal vehicles, electronic devices and appliances.

1.5 Report and forms
The RTS should have designated reports and forms that station personnel are required to use for various defined purposes. Subsequently, station personnel should be trained on when to use these reports and forms and how to complete them. It is also important that the RTS have a formal system to distribute and collect this material, e.g., fax machines, couriers, or electronic transmittal. Forms may include, but not be limited to: station logs, pass down information logs, defect logs, station bulletins, injury claim forms, or lost and found.

The RTS should establish a method for its supervisory staff to review that the reports were submitted when warranted and that they were properly completed.

1.6 Monitoring normal duties of station personnel
The RTS should establish a program so that station personnel are monitored for the performance of their normal and routine job duties. Periodic reviews and audit should be performed to ensure all rules and policies of the RTS are adhered to and understood.

2. Safety
Station personnel should be mindful of any unsafe conditions, circumstances and events at or near a station. The RTS should require station personnel to immediately report such conditions to the proper authorities.

In case of doubt in any situation, the safest course of action must always be taken.

2.1 Responsibilities of station personnel
The RTS should train and expect station personnel to do the following, in responding to emergency situations:

- Report emergency situations as completely and accurately as possible. Update reports as soon as changes to the original situation become known.
- Remove passengers from the scene of an emergency as soon as it is safe.
- Be prepared to make emergency calls at all times. Take charge of the situation until relieved by proper authorities, per the RTS incident command system requirements.
2.2 Emergency situations

2.3 Fire in stations
Station personnel should be trained to report a fire, constantly maintain communication, and determine the safest course of action, including evacuation and fire extinguishing. Station personnel should provide proper authorities with the following:

- Type/extent of fire.
- Location.
- Course of action taken (e.g., extinguished the fire).
- Whether passengers were evacuated.

In the event that a fire is detected on a train, station personnel may be called upon to provide assistance to the operator. The RTS should establish its requirements of station personnel in coordinating station activities when there is a fire on a train.

2.4 Medical emergencies
RTSs should have policies and procedures prescribing employee response to medical emergencies based upon established requirements. Station personnel should call the proper authorities immediately whenever a medical emergency exists.

2.5 Passengers entering with prohibited items or violating codes of conduct
Station personnel should be responsible for being vigilant regarding passengers who attempt to enter the system with prohibited items or who violate passenger codes of conduct. Station personnel should be responsible for reporting such conduct to appropriate authorities.

2.6 Self and passenger evacuations
The RTS should train station personnel to safely evacuate a station, leading passengers to an area that is safely away from the cause of the evacuation. If station evacuation is necessary due to an emergency, then station personnel may be required to do the following:

- Use the public address system, bullhorn or electronic displays (if available) to make evacuation announcements directing passengers to the safest exits.
- Open all fare gate barriers and exit gates.
- Stop all escalators carrying passengers to the platforms.
- Check platforms, restrooms, elevators, stairwells and other areas for passengers who may need assistance.
- Make emergency evacuation equipment available to passengers who need special assistance.
- Keep the proper authorities advised of changing conditions, and use good judgment to maintain passenger safety.

2.7 Other safety-related training
The RTS should develop appropriate training for other safety and emergency response issues.

3. Security
Station personnel should be made responsible to maintain order in the station and to report any activity in the station that compromises its operation.
3.1 Reporting of suspicious items and/or behaviors
The RTS should train station personnel to be alert for any suspicious items or behaviors and to take appropriate action. Station personnel should be trained to treat all threats as serious and real, and to take necessary precautions.

3.2 Reporting criminal activity
The RTS should train station personnel to be alert for and to report to proper authorities any suspicious activity that may be a criminal offense. Station personnel should report to proper authorities any situation in which they think their personal safety or the safety of passengers, employees, or the general public is at risk.

3.3 Law enforcement reports
To assist law enforcement personnel to take enforcement action on non-felony crimes not witnessed by the law enforcement officer, station personnel may be required to sign law enforcement reports.

3.4 Other security related training
RTSs should develop appropriate training for any other emergency response and security issues.

4. Station personnel customer service
Customer service is a salient facet of station personnel job performance. The customer service that station personnel provide to transit patrons is a major factor in increasing customer satisfaction and loyalty. Therefore, station personnel customer service is a major mechanism for RTSs to increase ridership.

The RTS should develop a customer service program for its station personnel.

This section contains an itemization of customer service elements that RTSs should consider including in their station personnel customer service programs.

4.1 Customer service training
The RTS should conduct customer service training for station personnel. This training should be performed during employees’ initial qualification training phase and on a periodic follow-up basis. Unusual customer relations circumstances should be included in the training.

The RTS should develop procedures to guide station personnel on reporting and responding to these unusual circumstances in an expeditious, effective and professional manner. The most common of these unusual circumstances include the following:

- Responding to a medical emergency (see Section 2.4).
- Handling customer disputes.
- Responding to customer behaviors prohibited by the RTS, such as smoking, loud radio playing or eating and drinking.
- Separation of children from parents/guardians (see Section 5.1).
- Responding to requested media access and/or release of information.
- Prohibited items, such as flammable liquids, non-service animals or pets not in enclosed carrying cases, shopping carts, and bicycles (see Section 2.5).
- Unauthorized solicitation for commercial or other purposes.
4.2 Service for customers with disabilities and mobility limitations

RTSs are responsible for providing the highest quality of accessible transit services to customers with disabilities and mobility limitations that is reasonably possible. As station personnel are most often the primary employees who have direct contact with disabled and mobility-limited customers, it is especially important that they are trained and monitored in the provision of this type of service. Therefore, serving customers with disabilities and mobility limitations should be a central part of station personnel training and performance.

The RTS should train station personnel to respond to, be sensitive to and serve customers with various types of disabilities. Some of the most important topics that may be included in this training and job performance include the following:

- Recognizing and communicating with disabled and mobility challenged customers.
- How to determine what types, if any, of assistance may be required.
- How to respond and provide assistance such as assisting customers with mobility devices on and off trains and securing them on rail cars.

5. Service assistance

The RTS should also train station personnel in procedures and methods to assist operators in the direct provision of service. This may include assisting with rail vehicle equipment problems, rerouting trains, train evacuations, searching trains for lost items and/or parties, etc. This may also require that station personnel be trained in radio communication procedures.

Station personnel are quite often the closest employees to defective trains on the right-of-way besides the operators. Therefore, when trains become defective and delays or hazardous conditions exist, an RTS may consider it expedient to train and require station personnel to assist train operators in troubleshooting their trains. Some of the tasks that an agency may require station personnel to perform to assist train operators include the following:

- Cutting out switches or components such as defective doors or brakes.
- Using a fire extinguisher to extinguish a train fire.
- “Flagging” for an operator at the front of a train when the operator has to operate the train from a position other than the front cab.

These activities may require training in track safety and the use of hand signals.

5.1 Lost child

When a child is lost or separated from his or her parents, station personnel should comply as follows:

- Immediately contact the proper authorities.
- Provide a detailed description of the child, clothing and any special conditions.
- State exactly where the child was found.
- Stay with the child until the proper authorities or a parent arrives.
- Keep the child in the booth/kiosk or other public area of the station.
5.2 Disoriented people

Upon observing any individual who appears to be intoxicated or unable to take care of himself or herself, station personnel should attempt to prevent the individual from entering the system. The incident should be reported to the proper authorities.

6. Revenue procedures and fare evasion

6.1 Revenue procedures

The RTS should train station personnel on revenue procedures to expedite travel and the satisfaction of passengers. RTSs may require station personnel to be knowledgeable about the following:

- General fare structure, passes, transfer and payment procedures.
- Fare media and testing procedures, such as reduced/discount and group fares.
- Free riding privileges.
- Refund and response procedures for failed transactions and defective equipment.

6.2 Fare evasion

Station personnel should be alert for passengers who are entering and exiting the system without paying. Personnel should be trained to advise passengers of the correct procedures, filling out the appropriate forms to collect payment and reporting the fare evasion if the passenger refuses to cooperate. There should be procedures to handle repeat offenders and improper use of regular or discount fare media.

7. Station inspections and housekeeping/facility cleanliness

Station personnel may be trained in procedures to monitor and resolve issues relative to station cleanliness and facility maintenance. Procedures should include a method to report results of station inspections to ensure cleanliness in restrooms, break rooms and elevators.

An RTS may require station personnel to perform minor housekeeping duties, such as picking up or removing debris and loose garbage (e.g., newspapers, cans, bottles, etc.) from floors, stairs and other station elements such as benches.

8. Station features

Station features that personnel may be trained to monitor and/or use include the following:

- Information booth where station personnel monitor the activities of the station.
- Closed-circuit television monitors.
- Storage cabinets containing supplies and equipment needed to operate a station.
- Special equipment stored in station kiosks/booth cabinets, such as first aid kits, bullhorns and handheld illumination items.
- Emergency features including system shutoff, escalator switches, fire extinguishers, circuit breakers and traction power removal devices.
- The operation, monitoring and starting and stopping of station elevator and escalators.
- Information kiosks/brochure holders (to ensure that there are an adequate supply of information brochures, schedules and other publications available).
• Station and parking lot lighting (all lighting failures should be reported to proper authorities).

8.1 Parking lots and garages
Station personnel should be familiar with parking programs and alert to any unlawful or suspicious act or to unauthorized individuals in the station area.

8.2 Intermodal facilities
Station personnel should be familiar with the location, schedule and hours of service of other means of transportation surrounding the station.

9. Station opening and closing procedures
The RTS should train station personnel in the methods and procedures of opening and closing stations. The method of monitoring station personnel in regards to their reporting on time and adhering to the schedule is addressed in Section 1.

9.1 Station opening
9.1.1 Resolving station problems
When opening a station, station personnel should make sure that it is properly prepared for revenue service. Station personnel must be observant for and address/report and station abnormalities.

9.1.2 Station opening checklists
The RTS should provide a specific checklist that identifies the elements and procedures that station personnel are to follow when opening their stations. The elements on this checklist may include the following:

• Check in with designated authority.
• Inspect station and immediate surroundings for safety and security hazards and problems or weather related issues.
• Operate escalator and elevator controls and features.
• Ensure that fare equipment is operable and secure.
• Ensure that communication equipment is operable (e.g., platform telephones and TDD features, public address system, radio check with operation control center, etc.).
• Activate other systems in station, such as closed-circuit television monitors.
• Inventory booth/kiosk for necessary supplies and equipment and review station logs and bulletins/notices.
• Inventory and stock travel information brochures.
• Open security gates/doors to open station for service.
• Complete and forward all required reports and forms.
• Update station elevator status boards.

9.2 Station closing checklist
Prior to closing their stations, station personnel must inspect them for unusual conditions and ensure that all customers have exited after the last revenue train has departed the station.
During this station-closing activity, it is presumed that station personnel will be expected to follow many of the same procedures and/or elements as specified for station openings when similar situations exist unless an agency defines otherwise.

Elements and tasks that a rail transit system may include in its station-closing checklist include the following:

- Empty bins/discard debris and garbage.
- Check that all equipment is operational and secure (e.g., the revenue equipment, elevators and escalators are working properly and then turned off).
- Check that the track, stairs, elevators, escalators, ramps, floors, platforms, etc., are free of hazards and repugnant or disagreeable conditions.
- Ensure that booth/kiosk equipment is secure.
- Check out according to procedures with appropriate authorities.
- Secure the booth/kiosk door.
- Activate the station alarm if available.
- Close station gates/grilles.
- Exit station and lock station doors.
- Verify that no passengers are present in the station.

Definitions

customer relations: The practices that a rail transit system employs to interact with customers.

emergency: An unexpected event threatening personal safety or causing damage in any facility and/or right-of-way. The primary consideration in any emergency should be the safety of passengers and employees.

rail transit system: The organization that operates rail transit service and related activities.

station personnel: Rail transit system employees whose primary function is to provide customer service in rail stations. They are variously referred to as cashiers, station agents, customer assistants or station managers.

Abbreviations and acronyms

APTA American Public Transportation Association
NATSA North American Transit Recommended practices Association
RTS rail transit system
TDD telecommunications device for the deaf

Summary of document changes

1. Document formatted to the new APTA recommended practice format.
2. Sections have been moved and renumbered.
3. Scope and summary moved to the front page.
4. Sections of definitions, abbreviations and acronyms moved to the rear of the document.
6. Some global changes to section headings and numberings resulted when sections dealing with references and acronyms were moved to the end of the document, along with other cosmetic changes, such as capitalization, punctuation, spelling, grammar and general flow of text.
7. Section 1.2: Changed section title from Schedule adherence to Employee schedule compliance
8. Section 1.1.1: Bullets removed/section shortened
9. Section 1.1.2: Section modified for better flow, clearer language.
10. Section 1.2: Bullets removed.
11. Section 1.3: Minor language modifications to clarify intent.
12. Section 1.4: Bullets removed and incorporated into single sentence.
13. Section1.5: Bullets removed and incorporated into single sentence.
14. Section 1.6: Bullets removed.
15. Section 2.1: 1st, 2nd, 5th and 6th bullets, combined reporting emergency and updating report activities
16. Section 2.1: Deleted 7th and 8th bullets, due to ambiguity in how to ensure safety
17. Section 2.2: Examples of emergency situation have been moved to Annex D (5.2 in previous version)
18. Section 2.2: Deleted section titled Fire in train (5.4 in previous version). Incorporated portions into new 2.2.
19. Section 2.4: Bullets removed to simplify section and make it more global.
20. Section 2.5: Deleted section titled Weapons of mass destruction threats (6.1 in previous version)
21. Section 2.5: Added a new section titled Reporting of suspicious items and/or behaviors
22. Section 3.1: Renames to “Reporting of Suspicious items and/or Behaviors”
23. Section 3.2: Title of section shortened from “Alertness for and/or reporting criminal activity” to “Reporting criminal activity”
24. Section 4: Deleted section titled Unusual customer relations circumstances (7.2 in previous version)
25. Section 4.1: Changed the title to “Customer Service Training”
26. Section 4.1: Examples of customer service training topics have been moved to Annex C
27. Section 4.1: Added content from section titled Unusual customer relations circumstances to section
28. Section 4.2: Bullets combined for clarity
29. Annexes A – D added. These annexes are intended to be guidelines and serve as information and ideas to assist the rail transit systems in developing their own written emergency management plans.

Document history

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Annex A (informative): Examples of shift change information sharing
The RTS may require that station employees share certain types of information at a shift change, including, but not limited to:
- Service irregularities (planned & unplanned)
- Facility and equipment status, such as:
  - Ticket vending machines
  - Elevators/escalators
  - Ventilation
  - Alternate exit patterns
  - Fare gates

Annex B (informative): Examples of station personnel activities the RTS may monitor in order to evaluate job performance
The RTS should consider establishing requirements for routine station personnel duties that it may monitor. It may include, but not be limited to the following:
- Observing, testing, recording and reporting the operational conditions of the station.
- Taking prescribed, specific corrective measures to restore operational capacity to malfunctioning equipment.
- Maintaining station kiosk conditions for housekeeping and provision of material and supplies.
- Maintaining the general housekeeping conditions of the station.
- Performing personal interaction with customers, including providing service to customers with disabilities, proficiency of interpersonal skills such defusing conflict, body language, and the provision of travel information.
- Having knowledge of current bulletins and notices.
- Having knowledge of safety, security and emergency procedures.
- Having knowledge of where to obtain passenger information regarding fares, travel, etc.

Annex C: (informative) Examples of customer service training topics
Topics that may be included, but not limited to, in RTS customer service training for station personnel consist of the following:
- The mission and values of the transit system.
- The value to employees of being transit ambassadors, providing quality customer service and growing ridership.
- Identifying, resolving and handling customer complaints.
- Professionalism, including the values and traits required and maintaining and projecting an appropriate image.
- Characteristics of the use of proper interpersonal skills.
- Verbal communication and the characteristics and use of appropriate body language.
- Recognizing and responding to the special needs of customers.
  - Travel / Tourism information.
Annex D (informative): Examples of emergency situations

The following are examples of emergency situations:

- **Fire/smoke within a station:** An alarm may activate or smoke may be detected or reported.
- **Bomb threat:** All bomb threats should be treated as serious and real.
- **Earthquakes:** Seismic devices may be activated when there is an earthquake.
- **Station evacuation:** If a station evacuation is necessary due to loss of electrical power, bomb threat or other emergency, then station personnel may use the public address system or bullhorn to make evacuation announcements directing passengers to the safest exits.
- **Emergency traction power removal:** To de-energize traction power, station personnel may use an appropriate device on the platform nearest the intended track or notify the appropriate authority.
- **Electric shock:** Any contact with an energized traction power component may be fatal.
- **Platform overcrowding:** Station personnel should monitor the platform for overcrowding at all times, especially during commute hours and special events. Overcrowding may result in the temporary restriction of passenger access to trains or stations until the problem is resolved.
- **Passengers on track way:** Station personnel should immediately notify proper authorities whenever unauthorized personnel enter the track way.
- **Item on track way:** Station personnel should immediately notify proper authorities whenever an object that may interfere with train movement or create a hazard falls onto the track way.
- **Loss of station electrical power:** Station personnel should be trained to know that the following station equipment may be non-operational during an electrical power failure:
  - escalators
  - elevators
  - station lighting
  - parking lot lighting
  - automatic fare collection
  - station ventilation system
  - sump pumps
  - tunnel lighting
- **Imminent hazard:** An imminent hazard is a condition that poses a serious or immediate danger to passengers or employees. Station personnel should take appropriate steps to secure the area and to otherwise protect passengers and employees.