



## Vanpool Program Monthly Reporting Guide and Participation Instructions

Visit [SolVan.org](http://SolVan.org) or E-Mail: [SolVan@SunLine.org](mailto:SolVan@SunLine.org)

Or call (877) 4-SolVan (877.476.5826)

This document serves as a Guide and Manual to may fulfill the requirements and responsibilities for SolVan Program participation. This Guide applies only to those who have applied to and been approved by SolVan to participate in the Program. If you have NOT received SolVan approval, or have yet to apply to the Program, visit [SolVan.org](http://SolVan.org). On the [website](http://SolVan.org) are a variety of helpful documents to assist you: Quick Facts, Vanpool Application Step-by-Step Guide, Frequently Asked Questions (FAQs) and Vanpool Program Guidelines. The most important thing to remember is that your monthly SolVan subsidy is contingent on the vanpool following the program guidelines and submitting a monthly report. For each calendar period, **your monthly report is due by 5:00 p.m. on the 6<sup>th</sup> of the following month** – please pay close attention to how to gather your vanpool statistics and how to submit monthly reports online.

If you have been approved by SolVan to begin your subsidy and are happily vanpooling, read on for instructions on monthly logging/reporting duties and other participation requirements.

**A. Updating or Changing Vanpool Passengers, Schedule and Other Information.** When you applied to SolVan, you provided SolVan with a variety of information about your vanpool: passenger names and contact information, specific pick up and drop off locations and your vanpool schedule by time and day of week. You also submitted a Passenger List/Vanpool Manifest form that identified on one day of your commute the vanpool's odometer readings for when each passenger was picked up at the home end, dropped off at the work end and then returned at the end of the day. If there are any changes to any of the information that you submitted to SolVan during the application process, SolVan requires that you notify us as soon as the change occurs. Go to the SolVan [website](http://SolVan.org) and download a Microsoft Excel or a PDF version of the Change Form. Types of change(s) that you are required to update and report to SolVan, include changes to:

1. Your primary driver, your Alternate Reporter (Reporter) or the individual who holds the lease to the vanpool with Leasing Vendor (Leaseholder);
2. Passengers – either new or those leaving the vanpool, or a new Primary Driver;
3. Changes to your pickup and/or drop off locations – either new locations, additional locations that have been added or locations have been eliminated; and/or
4. Schedule changes, such as departure and arrival times, days of the week the vanpool operates or any variances week to week.

Upon receipt of this information, SolVan will review and ask questions if needed, and then SolVan will update the information that is contained on [TransTrackSystems.net](http://TransTrackSystems.net) (see Section C below).

Should you have a change to your lease (such as a different vehicle, a change in the lease amount or a change in who signs the lease/change in the Leaseholder), your Leasing Vendor will directly notify SolVan of these changes.

Ensuring that this information is up to date is critical, as it feeds into the monthly report that you are responsible to complete at the end of each month (see Section C below). If the application information contained in [SolVan.org](https://www.solvan.org) is not accurate and not up to date, you will have to stop your logging/reporting process into TransTrack, notify SolVan and SolVan will have to update [TransTrackSystems.net](https://www.transtracksystems.net) before you can complete your reporting.

To designate a vanpool passenger to serve as a Reporter, designate him/her as that role in Section E of your application on [SolVan.org](https://www.solvan.org). While on the SolVan [website](https://www.solvan.org), download a Microsoft Excel or a PDF version of the Change Form to designate this individual as the Reporter, and email to SolVan. Upon receipt, SolVan will email your Reporter requesting he/she fill out a [Participation Agreement](#) and upon receipt, provide your Reporter a username and password access to [TransTrackSystems.net](https://www.transtracksystems.net).

Be aware that the Reporter DOES NOT have access to the information on [SolVan.org](https://www.solvan.org) – only the Leaseholder has access to [SolVan.org](https://www.solvan.org). The Reporter will only be able to input trip data into [TransTrackSystems.net](https://www.transtracksystems.net) and submit the monthly report.

- B. **Gathering the Vanpool's Monthly Statistics.** At the end of each month you are required to submit statistics and other information about your vanpool commute. When your vanpool was approved, SolVan sent instructions about the type of information that is to be gathered each day your vanpool is in operation. SolVan created an Intake Form (also known as a "Cheat Sheet") that you can print off and place inside your vehicle so you can track your daily commute statistics. The Cheat Sheet is available in a Microsoft Excel and in an Adobe Acrobat PDF format and is available for download at this [link](#). The Cheat Sheet only provides enough space for seven days of commuting; as a result, you must print off enough sheets sufficient for your monthly commute. The data to gather for each day your vanpool is in operation, includes:
1. Identify the month/date/year for each day the vanpool is in operation for commute purposes.
  2. Identify if you have a loaner or temporary vehicle.
  3. Identify the names of your passengers and check only if a passenger DID NOT commute during that commuting work day (either to work, from work or both).
  4. In TransTrack under "Commute Statistics-Odometer" you will see the driver's odometer readings from your passenger manifest. If on one day you commute more miles than normal, add the additional miles to the "Ending" prepopulated odometer reading.
  5. In TransTrack under "Commute Statistics-Time" you will see your travel time from your application. If your travel time increases on one day, add additional time to the prepopulated time readings by adding additional minutes to the arrival time.
  6. If the vehicle is used for personal use and not commute related, or if you drive the vehicle for maintenance/repairs, you do not need to track or identify those additional miles (even though there is a field for this within TransTrack).

7. Identify out of pocket cost incurred by anyone in the vanpool group or if your Employer provides for or reimburses your group for any of these expenses (in addition to your monthly lease cost you pay to your Vendor). The cost categories on the form include:
  - a. **Parking fees;**
  - b. **Bridge fees or other toll road fees;**
  - c. **Other Fees or out of pocket costs (if entered, provide a description for those costs in the box below the TransTrack field); and**
  - d. **Fuel costs and unit of fuel purchased: Based on the type of vehicle you lease, TransTrack will reflect your vehicle fuel type and units of fuel. For a gasoline, diesel or hybrid vehicle, your fuel units will be in gallons. If an electric vehicle (EV) or a plug in hybrid vehicle (PHEV), your units will be in kilowatt hours (kWh).**
8. The last entry on the Cheat Sheet is the odometer reading when you park your vanpool at the home end on the last day of the calendar month period.
9. In TransTrack when the month end odometer reading is inputted, the system will prepopulate your monthly lease cost (before the SolVan subsidy is applied). This is entered by SolVan Administrator and should you believe this prepopulated lease cost is not correct, contact SolVan (as you cannot change this entry).
10. At the bottom of the Cheat Sheet, there is a section to notify SolVan if your vehicle had mechanical issues or if you were in an accident. There is a comment section, so as to notify SolVan of vehicle changes, or upcoming shift changes, etc.

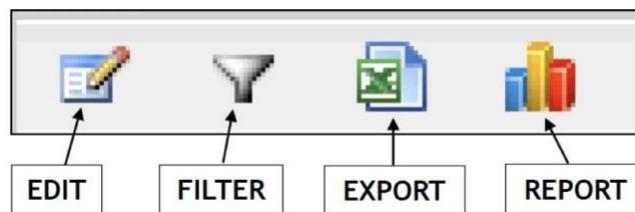
**C. TransTrack Reporting.** SolVan is required to report the vanpool statistics into the Federal Transit Administration's (FTA) National Transit Database. Through this reporting FTA generates transit funding which is returned to the SunLine Transit Agency and will be used to continue to fund the monthly subsidies and the SolVan program. Riverside County transit operators (through direction from the Riverside County Transportation Commission or RCTC) report all transit statistics into a 3<sup>rd</sup> party software program called TransTrack. Using the statistics that you gather from your Cheat Sheets, log onto [TransTrackSystems.net](http://TransTrackSystems.net) daily, weekly or monthly to transfer the information from the Cheat Sheet into TransTrack. Detailed instructions are as follows:

1. Use one of the four web-browsers compatible with TransTrack – those are: Windows Internet Explorer Version 8 or higher; or the most current browser versions of Apple's Safari; Google's Chrome; or Firefox.
2. When your subsidy was approved, SolVan generated a TransTrack email and instructions for you to log on and begin to input your reporting information into [TransTrackSystems.net](http://TransTrackSystems.net). If you selected a passenger to serve as a Reporter, he/she were sent similar instructions and username/password access to [TransTrackSystems.net](http://TransTrackSystems.net) as well. If you or your Reporter did not receive an email, first check your "junk" folder as the email will come from [DoNotReply@TransTrack.Net](mailto:DoNotReply@TransTrack.Net). If you have not received this email, please contact us ASAP.
3. The email from TransTrack contains a link so TransTrack may validate your account and you may receive your password. If the link is not working, paste the content of the link into your web browser's address bar. Note that the link expires in seven (7) days – if you activate the link after the

seven (7) day period, then select the “Forgotten Password” link on below the Password field and a password will be emailed to you.



4. Once you have created/established a username and password, and if you are logging on a trusted computer, you can save your username and password. For future visits, go to <https://www.transtrack.net/login.aspx?x=2F6C6F676F6E> and enter your username and password. Or if you are on the main [TransTrackSystems.net](https://www.transtrack.net) website homepage, select the tab in the middle right called “Client Login”, then enter your username and password.
5. When editing your records and data, these icons represent the following actions:



6. After logging on, you will see four tabs – three of which are described briefly below:
  - e. **Organization>Message Board:** This is primarily for RCTC communication to all Riverside County transit operators.
  - f. **Support>Training Materials:** there is a short video about TransTrack tips/tricks – if you view the video, note that many of the features are not available on your vanpool reporting view, but it may be of use to view.
  - g. **Utilities>Change Password:** use this tab to customize your TransTrack password.
  - h. **Help:** A “help” button is visible in the upper right corner on all pages/tabs/view and reports. When selected, you will see a pre-populated form with your name and email. Your message will go to TransTrack staff who will assist you with system questions or problems. This is the best way to request TransTrack assistance as online help requests are distributed to the entire TransTrack Tech Support team for resolution. If your issue/question involves the passenger list in TransTrack (if passengers are not correctly identified or other info from your application), contact [SolVan](https://www.solvan.com) (not TransTrack) to remedy that issue.
7. **Operations>Daily Vanpool Statistics Tab:** This is the tab you will select when inputting your daily trip statistics.
  - a. Select the “**Edit**” icon in the upper left to start your reporting. When doing so, a series of fields in yellow appear to the right of the screen. As soon as you begin

typing in the fields to the right, you will see these choices appear above the fields, which then allows you to save, cancel or print the form, upon completion.



- b. **Vanpool #:** Your **SolVan vanpool ID** is prepopulated (in a XXX.YY.ZZ format).
- c. **Date:** Select the **date** you commuted that is applicable for this data entry. Should you enter the wrong date and proceed to enter data, and then change the date, all of the fields below the date will reset and the passenger list will be blank. You will then have to re-enter the appropriate information for that date.
- d. **Driver:** Ensure the drop down correctly identifies the Primary Driver/Leaseholder. If not, [contact](#) SolVan.
- e. **Vehicle #:** This field describes the fuel type of vehicle that your vanpool is currently operating. If you believe this is incorrect [contact](#) SolVan immediately.
- f. **Loaner Vehicle #:** If you have a **loaner/temporary vehicle**, in this field put "LOANER" for each day you commuted with this loaner/temporary vehicle.
- g. In the **Commute Statistics** section. TransTrack has pre-populated entries:
  - i. **Odometer:** You will see the odometer readings from your passenger manifest. If on one day you commute more miles than normal, add the additional miles to the "Ending" prepopulated odometer reading.
  - ii. **Time:** You will see your travel time from your application. If your travel time increases on one day, add additional time to the prepopulated time readings by adding additional minutes to the arrival time. Make sure all time entries are in 24 hour [military time](#) (instead of 5:00 p.m., enter 17:00).
- h. **Non-Commute Miles (Optional):** Should you travel substantial miles that are not commute related and are for personal or maintenance purposes, identify those miles in this section but DO NOT check the "Subtract" boxes.
- i. **Passenger List:** Check any **passenger(s) that DID NOT** commute on that day, either to work or from work back to the home end. Please ensure you check both boxes, as the first column is your commute from home to work and the 2<sup>nd</sup> column is to document your commute from work to home.
- j. **Fees:** Enter all **out of pocket costs** incurred by anyone in the vanpool group or reimbursed by your employer, on the day those costs were incurred (such as lubricants, windshield wipers, toll fees, etc.). If there were no costs on a particular day, leave those fields blank. **DO NOT** include your lease costs in this section.
- k. **Fueling:** Based on information from your Leasing Vendor, your TransTrack report is set up to capture the fuel type for your particular vanpool vehicle. Enter the **fuel** costs (even if reimbursed by your employer) to the cent (\$XX.YY format), as well as the quantity of fuel purchased. If reporting gallons of fuel, report to the 100th of a gallon (XX.YY format). If driving an electric vehicle, report how much kilowatt hours of energy consumed (kWh). If you did not fuel your vehicle on that day, these fields can be left blank. If you summarize fuel costs at month end, please identify total fuel costs and total units of fuel purchased on last commute day of month.
- l. **Other Information:** If an accident, **mechanical or safety Incident** occurred on a particular commute day, check the appropriate box, and fill out an Incident Report

Form (which can be found on TransTrack in Support>Training Materials). Once completed, upload the Incident Report Form by selecting the “Choose File” button and browse your directory for the form to upload. Should your Leasing Vendor have a form for you to fill out, that would suffice as well – please upload.

- m. **Monthly Vehicle Lease Cost:** Upon entering the end of month odometer reading (see item C.7.m below) and saving this record, TransTrack will populate your monthly lease amount before the SolVan subsidy. The lease amount was provided by your Leasing Vendor during your application process, or upon a change in vehicle. If you believe this amount is not correct, [contact](#) SolVan immediately.
- n. **End of Month Odometer:** On the last day of the month, enter your vehicle’s **odometer** when you parked your vehicle at the home, in a XXXXX.X format.
- o. There is a **comment** field in the event you have comments for a particular day.

Vanpool #	001.ER.ER			
Date				
Driver	-- None --			
Vehicle #	VP-Gas			
Loaner Vehicle #				
<b>Commute Statistics (Pre-populated by Application - Change If Needed)</b>				
	Starting	Ending		
Odometer	12345	12445		
	Home-To-Work		Work-To-Home	
	Departure	Arrival	Departure	Arrival
Time	05:00	09:48	20:30	21:48
<b>Non-Commute Miles (Optional)</b>				
Personal Miles		<input type="checkbox"/> Subtract Personal Miles? Check if Yes.		
Maintenance Miles		<input type="checkbox"/> Subtract Maintenance Miles? Check if Yes.		
<b>Passengers That Did Not Travel as Expected</b>				
	Home-To-Work Trip		Work-To-Home Trip	
	No Selection Available		No Selection Available	
<b>Fees</b>				
Parking Fees		Bridge & Other Tolls		Other Fees
Description of Other Fees				
<b>Fueling</b>				
Fuel Cost		Gallons of Fuel		
<b>Other Information</b>				
<input type="checkbox"/> Mechanical Incident?		<input type="checkbox"/> Safety Incident?		
Attached Report	Choose File no file selected			
No Document Available				
Monthly Vehicle Lease Costs (Pre-populated by Application)		End of Month Odometer		
Comments				

**8. Operations>Daily Vanpool Statistics Summary.** This tab provides a place where you can view the daily data in a summary view, and easily spot data entry errors.

- a. Use the sort feature by clicking on the column header, and records will sort by either ascending or descending order based on the number of times you click on it. By doing this you can quickly see if there are any outlying values that were

entered (i.e. negative or high hours, miles, average operating speed, and fuel economy) due to data entry errors.

- b. This view is a report view only. While in this view, should you see an error and need to correct your data, go to the Operations>Daily Vanpool Statistics to view and edit your data for that day.

**D. TransTrack Reporting Deadlines.** Your vanpool commute statistics and out of pocket expenses must be inputted into [TransTrackSystems.net](http://TransTrackSystems.net) by no later than **5:00 p.m. on the 6th day** of the following month. For example, the November monthly TransTrack report (which covers November 1 through 30) is due by no later than December 6th, by 5:00 p.m. **If the deadline falls on a day off, on a weekend or holiday, it is still your responsibility to ensure the report is complete and submitted by the 6th of that month.** If you are unable to submit your report by the deadline, and you have not identified a Reporter for your vanpool who can submit the report by the deadline, [contact](#) SolVan immediately. Remember that your SolVan subsidy is contingent on following the program guidelines and submitting a monthly report, accurately and on time.

**E. SolVan Payment of Your Monthly Subsidy. Your Leasing Vendor** will invoice you at some point prior to the start of your SolVan subsidy. Upon SolVan receipt and review of your monthly log/report (which occurs after the close of the reporting month), SolVan pays the subsidy directly to your Leasing Vendor. Since your subsidy is determined based on your lease amount (50% of the lease amount not to exceed \$400 per month), should your lease change with your Leasing Vendor, your subsidy may change as well. Any changes to your lease will be reported into [SolVan.org](http://SolVan.org) directly by Leasing Vendor. Should there be any discrepancies on your bill from Leasing Vendor with the SolVan-provided subsidy, contact your Leasing Vendor first to resolve. If the issue is not resolved, please [contact](#) SolVan for assistance.

**F. Collecting Passenger Fares.** SolVan is not involved in coordinating or collecting the payment of any residual amounts owed by the vanpool passengers, through you to your Leasing Vendor. As such, it is the responsibility of the vanpool Leaseholder to determine how and when these fees/fares will be collected. SolVan recommends this process be established when the vanpool is created and prior to applying to the SolVan Vanpool Program.

**G. Maintaining Minimum Requirements.** Note that the requirements that qualified you for the SolVan Vanpool Program continue throughout the life of the program. These minimum criteria include, but are not limited to:

1. The vanpool's Leaseholder must be the primary point of contact with SolVan and is ultimately responsible for meeting all program requirements and submitting the monthly reports into TransTrack. We also recommend you identify a Reporter for your vanpool, who could assist with vanpool reporting and coordination, should the Leaseholder be off work or unavailable for a period of time;
2. The vanpool must be used for commuting purposes to and from work and/or vocational/post-secondary education destination ("Worksite");
3. The Driver of the vanpool must be a volunteer and a participant in the program;
4. You must lease your van through a SolVan-Approved Leasing Vendor;

5. Minimum occupancy must be maintained at 50% or higher;
6. Your round-trip travel to and from work must be at least 25 miles;
7. Your minimum commute days each month must be at least 12 days;
8. Your trip must either begin or end your commute within Eastern Riverside County (which includes the greater Coachella Valley or Blythe areas).

Should at any point any of these very important criteria change, please [contact](#) SolVan immediately.

**H. Major Changes to Your Vanpool.** SolVan understands that from time to time passengers leave, Leaseholders change or there may be a reason to end your participation with the SolVan Subsidy Program. These changes are handled in different manners, per the following:

1. Changes to the passenger list, schedule or pick up/drop off locations, must be updated through the SolVan [Change/Manifest form](#) ASAP. These actions are more fully described in Section A above.
2. Should there be a change in the Primary Driver or the Reporter, notify SolVan by submitting the SolVan [Change/Manifest form](#) ASAP .
3. Should the vanpool's Leaseholder terminate his/her lease with Leasing Vendor, and another passenger or coworker takes over the lease, this is considered a minor change. Leasing Vendor will update their information on [SolVan.org](#) and the new Leaseholder should contact SolVan to seek login information into [SolVan.org](#) and take over the application updates and other responsibilities. Note that when this occurs, the vanpool identification number assigned by SolVan remains the same, as well as all the information contained on [SolVan.org](#). SolVan will guide the new Leaseholder through the update process.
4. Should the Leaseholder decide to end his/her participation in the SolVan subsidy program, and a passenger or coworker is unable to take over the lease, [contact](#) SolVan immediately. When a SolVan Vanpool Program termination occurs, the last day of participation in the SolVan Vanpool Program may occur at any day throughout the month, and SolVan will prorate the subsidy amount provided to Leasing Vendor; however, the final subsidy is dependent on the Leaseholder submitting a final log/monthly report for the period the vanpool participated during that final month and complying with the other program requirements. Should this log/report not be submitted or other requirements are not met, then SolVan may suspend a final subsidy payment to Leasing Vendor.

Feel free to [contact](#) SolVan should you have questions nor need clarification on the roles and responsibilities to continue receiving a SolVan subsidy. We truly want the SolVan Vanpool Program to continue to be a huge success – and thank you in advance for your cooperation and participation. Happy commuting!!!