Vanpool Program Monthly Reporting Guide and Participation Instructions

Visit **SolVan.org** or E-Mail: **SolVan@SunLine.org**
Or call (877) 4-SolVan (877.476.5826)

This document serves as a Guide and Manual so that you 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**. On the **website** are a variety of helpful documents to assist you: Quick Facts, Vanpool Application Step-by-Step Guide, Frequently Asked Questions (FAQs) for Applying to the Program 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 6th 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 the SolVan Vanpool Subsidy Program, 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 **email** us an update to this information as soon as the change occurs. Go to the SolVan **website** 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:

1. Changes to your primary driver, your Alternate Vanpool Reporter or the individual who holds the lease to the vanpool with Enterprise Rideshare ("Leaseholder");
2. New passengers or a new Primary Driver;
3. Changes to the Leaseholder;
4. Passengers or the Primary Driver leaving the vanpool;
5. 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
6. 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 **TransTrack.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 Enterprise lease (Leaseholder), Enterprise Rideshare will notify SolVan of these changes.

Ensuring that this information is up to date is critical, as it feeds into the monthly log/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** is not accurate and up to date, then you will have to stop your logging/reporting process into TransTrack.net, notify SolVan and SolVan will have to update **TransTrack.net** before you can complete your reporting.

If you are unable to update your vanpool information through **SolVan.org**, it is your responsibility to delegate this task to another individual in your vanpool. To designate a vanpool passenger to serve as an Alternate Vanpool Reporter, you may designate him/her as that role in Section E of your passenger list on **SolVan.org**. When designated, SolVan will set that individual up in **TransTrack.net** and forward to him/her a link to have access to the online reporting function, as well as a copy of this instructional guide. If you wish to designate a passenger as a Reporter after your subsidy begins, go to the SolVan **website** and download a Microsoft Excel or a PDF version of the Change Form. SolVan will update your application information, send an email to your Reporter requesting he/she fill out a **Participation Agreement** and upon receipt, provide your Reporter a username and password access to **TransTrack.net**.

Be aware that the Alternate Vanpool Reporter DOES NOT have access to the information on **SolVan.org** – only the Leaseholder has access to **SolVan.org**. The Alternate Vanpool Reporter will only be able to input trip data into **TransTrack.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 six 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. The Enterprise Vehicle ID should you have a loaner or temporary vehicle.
   2. Identify the month/date/year for each day the vanpool is in operation for commute purposes.
   3. Identify the names of your passengers and check only if a passenger DID NOT commute during that commuting work day.
   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. Identify out of pocket cost incurred by anyone in the vanpool group (in addition to your monthly lease cost you pay to Enterprise). The cost categories on the form include:
   a. Parking fees,
   b. Bridge fees or other toll road fees,
   c. Fuel costs, gallons purchased and the odometer reading when fueling,
   d. Other out of pocket costs, and

7. The last entry on the "Cheat sheet" is odometer reading when you park your vanpool at the home end on the last day of the calendar month period.

8. 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).

9. Should you use the vanpool vehicle for personal use that is not commute related, or drive the vehicle for maintenance or repairs, you do not need to track or identify those additional miles. If you do track them, you can input those miles into TransTrack, but it is not necessary/required.

C. **TransTrack.net Reporting**. SolVan is required to report the vanpool statistics into the Federal Transit Administration's (FTA) National Transit Database. It is this national database that the 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 vanpool program. Riverside County transit operators (through direction from the Riverside County Transportation Commission or RCTC) report all transit statistics into a 3rd party software program called TransTrack. Using the statistics that you gather from your Cheat Sheets, log onto **TransTrack.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; 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 **TransTrack.net**. If you selected a passenger to serve as an Alternate Vanpool Reporter, he/she were sent similar instructions and username/password access to **TransTrack.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**. 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 **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:
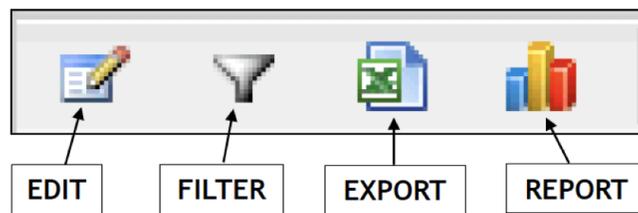
6. After logging on, you will see four tabs – three of which are described briefly below:
    a. **Organization>Message Board**: This is primarily for RCTC communication to all Riverside County transit operators.
    b. **Support>Training Materials**: there is a short video about TransTrack tips/tricks – 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.
    c. **Utilities>Change Password**: use this tab to customize your TransTrack password.
    d. **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 you may be experiencing. 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** (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.

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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.
b. Your **SolVan vanpool ID** is prepopulated (in a XXX.YY.ZZ format).
c. Select the **Driver** of the vehicle (provided during your application and inputted by SolVan into TransTrack).
d. If you have an Enterprise **loaner/temporary vehicle**, identify the Enterprise-assigned vehicle number for the day you commute. The Enterprise vehicle ID is a six-digit ID that is a combination of letters and numbers (such as 7NCND6). If you do not have a temporary/loaner vehicle from Enterprise, leave this blank.
e. Select the **date** that you commuted that is applicable for your data entry. For some reason if you enter the wrong date and proceed to enter data, and then change the date, all of the fields below the date will reset (default odometer readings, times and the passenger list will be blank). You will then have to re-enter the appropriate information for that date.
f. In the **Commute Statistics** section TransTrack has pre-populated entries:
    i. Under "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.
    ii. Under "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. Please make sure any changes to "Time" are in 24 hour **military time** (for example, instead of 5:00 p.m., you would enter 17:00).
g. **Non-Commute Miles** entries are 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.
h. 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 2nd column is to document your commute from work to home.
i. 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, parking/bridge/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.
j. Enter the **fuel** costs (even if reimbursed by your employer) to the cent ($XX.YY format), the gallons of fuel purchased to the 100th of a gallon (XX.YY format), and the odometer of the vehicle at the time of fueling. If not fueled these fields can be left blank. If you summarize fuel costs at month end, please identify total fuel costs and total gallons purchased, and leave the odometer reading blank.
k. If a **Mechanical or Safety Incident** occurred on a particular commute day, check the appropriate box, and fill out an Incident Report Form. Once completed attach the Incident Report From by selecting the "Choose File" button and browse your directory for the form to attach. An incident Report Form can be found on TransTrack in Support>Training Materials. Should Enterprise Rideshare have a form for you to fill out, that would suffice as well – please upload.

l. 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.

m. Upon entering the end of month odometer reading, and saving this record, TransTrack will populate your monthly lease amount before the SolVan subsidy. The lease amount was provided by Enterprise during your application process, or upon a change in vehicle. If you believe this amount is not correct, **contact** SolVan immediately.

n. During a commute day should you experience an accident or incident, check the box under "Other Information" and attach an incident report.

o. There is a **comment** field in the event you have comments for a particular day.

Vanpool #	001.ER.ER
Driver	-- Please Select One
Vehicle #	Vanpool
Loaner Vehicle #	
Date	01/02/2018

Commute Statistics (Pre-populated by Application - Change If Needed)

	Starting	Ending
Odometer	53368	53549

	Home-To-Work		Work-To-Home	
	Departure	Arrival	Departure	Arrival
Time	04:30	06:00	16:30	18:00

Non-Commute Miles (Optional)

| Personal Miles | | ☐ Subtract Personal Miles? Check if Yes. |
| Maintenance Mile | | ☐ Subtract Maintenance Miles? Check if Yes. |

Passengers That Did Not Travel as Expected

Home-To-Work Trip	Work-To-Home Trip
☐ 1. Pedro Reyes	☐ 1. Pedro Reyes
☐ 2. Pedro Mendoza	☐ 2. Pedro Mendoza
☐ 3. Matt Carpela	☐ 3. Matt Carpela
☐ 4. Tom Zielinski	☐ 4. Tom Zielinski
☐ 5. Mark Figueroa	☐ 5. Mark Figueroa

Fees

Parking Fees [ ]   Bridge & Other Tol [ ]   Other Fees [ ]

Description of Other Fees

Fueling

Fuel Cost [ ]   Gallons of Fue [ ]   Fueling Odomete [ ]

Other Information

☐ Mechanical Incident?   ☐ Safety Incident?

Attached Report   Choose File   no file selected
(512 KB Maximum)   No Document Available

Monthly Vehicle Lease Costs [ ]   End of Month Odomete [ ]
(Pre-populated by Applicatio..,)

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 must be inputted into **TransTrack.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 an Alternate Vanpool Reporter for your vanpool who can submit the report by the deadline, contact SolVan immediately. Remember that your monthly 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.** Enterprise Rideshare will invoice you at some point prior to the start of your SolVan subsidy. Upon SolVan receipt and review of your monthly log/report after the close of the month, SolVan then pays the subsidy directly to Enterprise Rideshare. 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 Enterprise Rideshare, then your subsidy may change as well. Any changes to your lease will be reported into **SolVan.org** directly by Enterprise Rideshare. Should there be any discrepancies on your bill from Enterprise Rideshare and the SolVan-provided subsidy, contact Enterprise Rideshare 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 Enterprise Rideshare. 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;

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 Enterprise Rideshare;
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 Alternate Vanpool Reporter, notify SolVan by submitting the SolVan **Change/Manifest form** ASAP .
3. Should the vanpool's Leaseholder terminate his/her lease with Enterprise Rideshare, and another passenger takes over the lease, this is considered a minor change – Enterprise Rideshare will update **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 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 Enterprise Rideshare; 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. Should this log/report not be submitted, then SolVan will suspend a final subsidy payment to Enterprise Rideshare.

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!!!