



Log-In and Reporting Instructions for Employer

On behalf of the Orange County Transportation Authority (OCTA), thank you for participating in the OC Vanpool program. By providing your employees the ability to vanpool, traffic congestion and carbon emissions are reduced. It's a smart decision to share the ride while saving money, time, and reducing stress and personal vehicle mileage. Combined with the OC Vanpool monthly subsidy, it's a winning combination!

OCTA receives grant funding from the Federal Transit Administration (FTA Urbanized Area Formula Program). This is the basis for the \$400 monthly subsidy we provide to eligible vanpools in the OC Vanpool program. To remain eligible for this funding, OCTA is required to submit data monthly and annually to the National Transit Database. Most of the data required for these reports is derived from reports submitted by the vanpool group. Timely, accurate reporting is essential for the success of this program.

Participants must meet certain requirements to remain in the OC Vanpool program and continue to receive the \$400 monthly vanpool subsidy. All participating vanpool groups are required to report passenger participation trips and vanpool expenses by the 10th day of each month. If you fail to report or report after the 10th of the month, you will not receive the \$400 subsidy.

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1. Getting Started/ Reporting Trips and Expenses

Register for A New Account / Reporting Trips and Expenses

Once your vanpool provider collects your completed OC Vanpool forms, they will forward them along with other information to OCTA. If you qualify, you will receive a welcome email from OCTA with your vanpool key number and instructions to set up your account on-line.

First, you must **register for a new account**.

Step #1 – Click here: <https://vanpools.octa.net/> (use Google Chrome or Firefox for best results)

Step #2 – Click “Register for New Account” in the middle of the page

Orange County
Transportation Authority

OC VANPOOL

Login Authentication

User Name:

Password:

[Forgot Password?](#)

[Register For New Account / Forgot Username](#)

Having issues with this portal? Please download our new vanpool mobile app to report trips and expenses: [iPhone](#) / [Android](#)

To view the terms and conditions of using this web portal, please visit <http://octa.net/disclaimer/>

Click here for [Vanpool Home Page](#)

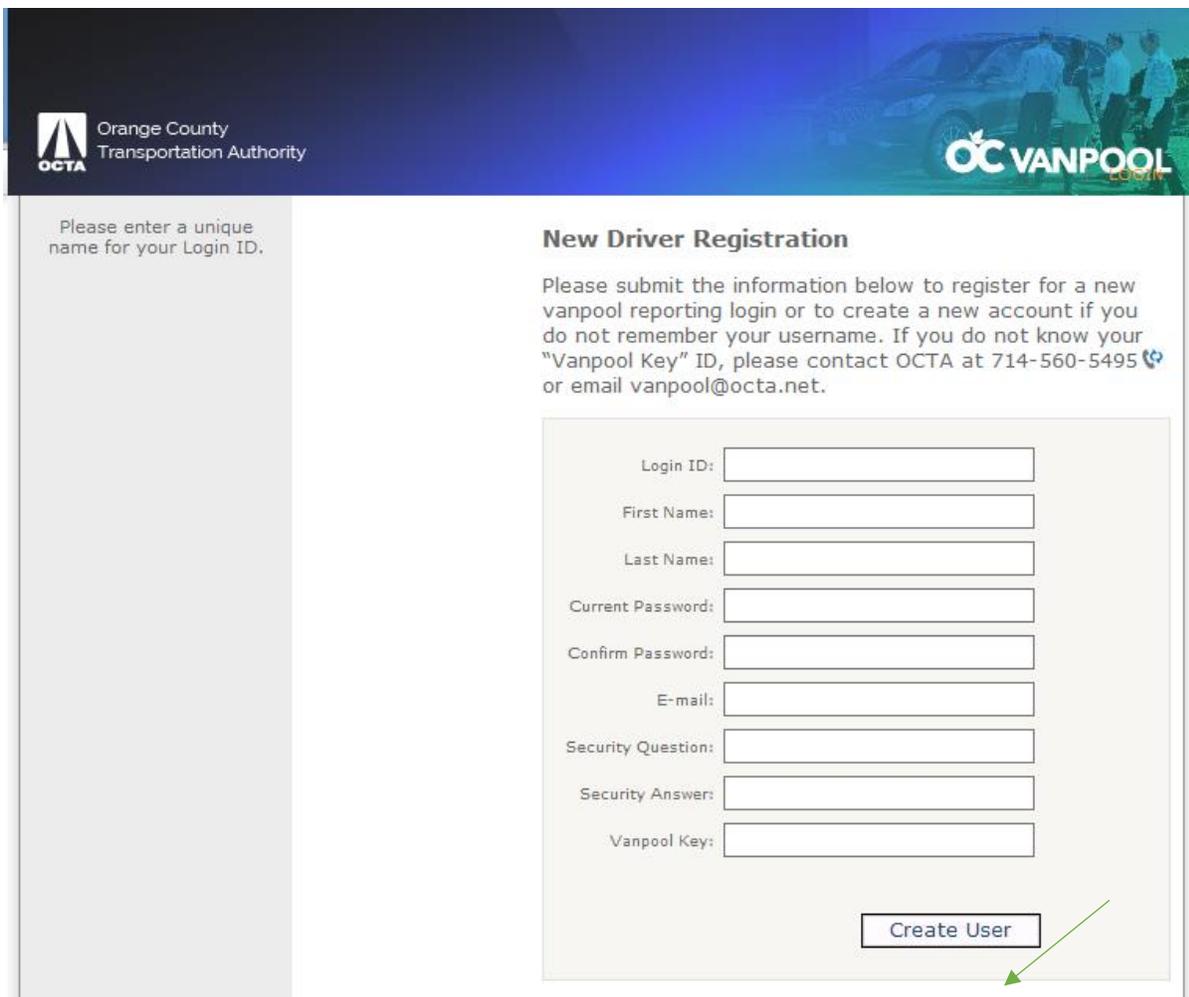
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Step #3 – Fill out your information on the next page by creating a unique login ID (which will become your user name) and create your password.

The password must:

1. be at least 8 characters long – it will not accept ().
2. start with an alpha character.
3. have at least one upper case letter.
4. have at least one lower case letter.
5. have at least one number.
6. Have at least one special character - ! # \$ % &.

Please save the user name and password you created. You will need both to log in to your account each month. Remember that the password is case sensitive. Next, enter your email address. This is the email that will be used to reset your password in case you forget it. You will be asked to enter a security question (i.e.- what’s your favorite sports team, pet’s name, etc..). Enter the answer for the question you created. This feature will uniquely identify you when resetting account information. Finally, enter the vanpool key number you received in your email from OCTA. Click “Create User” to complete form.



The screenshot shows the 'New Driver Registration' form on the OC Vanpool website. The header includes the OCTA logo and the text 'Orange County Transportation Authority' on the left, and the 'OC VANPOOL' logo on the right. The main heading is 'New Driver Registration'. Below the heading is a paragraph of instructions: 'Please submit the information below to register for a new vanpool reporting login or to create a new account if you do not remember your username. If you do not know your "Vanpool Key" ID, please contact OCTA at 714-560-5495 or email vanpool@octa.net.' The form contains several input fields: 'Login ID:', 'First Name:', 'Last Name:', 'Current Password:', 'Confirm Password:', 'E-mail:', 'Security Question:', 'Security Answer:', and 'Vanpool Key:'. A 'Create User' button is located at the bottom right of the form, with a green arrow pointing to it. On the left side of the form, there is a grey box with the text 'Please enter a unique name for your Login ID.'

Congratulations! You have successfully registered. Click the “Finish” button to bring up your account. Now you are ready to see the reports that need to be completed each month.

Please enter a unique name for your Login ID.

New Driver Registration

Please submit the information below to register for a new vanpool reporting login or to create a new account if you do not remember your username. If you do not know your “Vanpool Key” ID, please contact OCTA at 714-560-5500 or email vanpool@octa.net.

Your User Account has been successfully Created.
Please Click Finish to Access the Vanpool Manager.

[Finish](#)

Step #4 – The current list of passengers should appear on the “Participation” page. Please verify that all the passengers are displayed so you can begin reporting trips or viewing the trips reported. You or the coordinator can report passenger trips daily, weekly or monthly, depending on your preference, as long as the report is complete by the 10th day of the following month. For example, March passenger trips should be reported by April 10th. Make sure you report by the 10th of the month to remain eligible for the \$400 OC Vanpool subsidy.

The screenshot shows the 'OC VANPOOL' management interface. At the top, it says 'Logged in as: khewkin'. The navigation bar includes 'HOME', 'APPLICATIONS', 'RESET PASSWORD', 'VANPOOL MANAGER', and 'ADD VANPOOLS'. The main header shows 'Orange County Transportation Authority' and 'OC VANPOOL'. The page title is 'Vanpool Management' and the user is logged in as 'Customer ID: 32'. Below the title are three tabs: 'Select Vanpool', 'Participation', 'Expenses', and 'Passengers'. The 'Participation' tab is active, showing a grid for reporting trips. The grid has columns for days of the week (Monday to Sunday) and rows for passengers. The passengers listed are Jianing Cao, Wendy Chamorro, Lucie Dean, Luis Medina, Vijaykumar S. Meli, Jasmine Robledo, and Weigang Yang. Each cell in the grid contains two checkboxes. The first checkbox is checked for all passengers on all days. The second checkbox is also checked for all passengers on all days. At the bottom of the grid, it says 'Total Passengers: 7' and 'Van Size: 7 Passengers'. There are buttons for 'Previous Week', 'Next Week', 'Check All', 'Print', and 'Save'. A callout box on the left points to the passenger list, and a callout box on the right points to the 'Customer ID: 32'.

Step #5 – You will be able to report the first date that passengers begin riding in the vanpool, and no sooner. Simply place a check mark in the first box (left) if that passenger rode to work in the vanpool and a check mark in the second box (right) if that passenger rode back home from work. If the passenger didn’t ride to work or home in the vanpool, leave both boxes empty. The passenger’s name must match the trip that is being reported. For example, if the passenger left the van and a new passenger joined, you must delete the passenger that left and add the passenger that joined. Do not report trips for a passenger who is not riding. (Example: sick day, vacation day holiday, or no longer a passenger)

Always hit the “Save” button on the bottom right hand corner when you are done before proceeding to the next week. To proceed to the next week, hit the “Next Week” button on the bottom of the left-hand screen.

Participation tab to report passenger trips

Logged in as: khewkn

Orange County Transportation Authority

HOME APPLICATIONS RESET PASSWORD VANPOOL MANAGER ADD VANPOOLS

OC VANPOOL HOME - VANPOOL MANAGER LOGOUT

Customer ID: 32

Select Vanpool Participation Expenses Passengers

	Monday Mar-06 2017	Tuesday Mar-07 2017	Wednesday Mar-08 2017	Thursday Mar-09 2017	Friday Mar-10 2017	Saturday Mar-11 2017	Sunday Mar-12 2017
Jianing Cao	<input checked="" type="checkbox"/>						
Wendy Chamorro	<input type="checkbox"/>						
Lucie Dean	<input checked="" type="checkbox"/>						
Luis Medina	<input type="checkbox"/>						
Vijaykumar S. Meli	<input checked="" type="checkbox"/>						
Jasmine Robledo	<input type="checkbox"/>						
Weigang Yang	<input checked="" type="checkbox"/>						

Total Passengers: 7 Van Size: 7 Passengers

Previous Week Next Week Check All Print Save

Check box if passenger rode home that day

Check box if passenger rode to work that day

Click "Next Week" button after hitting save button to report for next week

"Check All" box will populate all passenger boxes at one time

Hit "Save" button after you report trips and before you move to next

Step #6 - Click "Expenses" tab to go to the page where monthly vanpool expenses must be reported. Expenses should always include fuel, gallons purchased, and car washes; if road tolls or parking charges are incurred during the commute, they must also be reported.

Step #7 - Click the “Expense Type” dropdown to select the expense you want to input. For fuel cost, you are required to input the amount and the actual gallons associated with the purchase. Do not enter estimates. Input the date associated with the report (i.e. March expenses should not be reported with an April date). Vanpool expenses must be reported whether they are out of pocket or paid by the employer. Car wash expenses and any parking and tolls associated with the commute must also be reported. Reporting fuel only will be considered an inaccurate expense reporting.

Step #8 – Ensure accurate information by keeping receipts. You can input the expense when it is incurred or input the total expense for each category once per month. Just be sure to report it in the month the expense was incurred. Click the “Add Expense.”

Expense History From: 8/2/2018 to 10/2/2018

EXPENSE DATE	ROAD TOLLS	FUEL COSTS	FUEL (GAL)	CAR WASH	PARKING	
08/02/2018		\$48.00	15			Delete
08/08/2018		\$43.75	13			Delete
08/09/2018	\$95.00					Delete
08/13/2018		\$34.01	10			Delete
08/16/2018		\$44.71	14			Delete
08/22/2018		\$43.33	13			Delete
08/28/2018		\$39.09	12			Delete
08/28/2018				\$18.99		Delete

Step #9 – If you input an expense incorrectly and need to delete it, simply click the “Delete” button. Only delete if there is an error; otherwise, leave all expenses recorded for the history expense report to be complete. If you do delete an expense, please remember to go back and enter the expense item correctly. You can view the entire month of expenses you reported at a glance.

Expense History From: 1/13/2017 to 3/13/2017

EXPENSE DATE	ROAD TOLLS	FUEL COSTS	FUEL (GAL)	CAR WASH	PARKING	
01/16/2017		\$11.00	1			Delete
01/17/2017		\$1.00	11			Delete
01/18/2017		\$22.00	33			Delete
01/18/2017		\$22.00	33			Delete

That’s it! Now just repeat the trip and expense reporting every month and be sure to report by the 10th of the month. Not reporting, reporting late, or reporting expenses for the month it was not incurred puts the \$400 monthly vanpool subsidy in jeopardy.

You can also report your participation trips and expenses using our OC Vanpool mobile app by searching “OC Vanpool” in the App Store or Google Play.

2. Adding New Vanpool Groups to Existing Employer Account

Step #1 – Go to Login Page vanpools@octa.net. You will use the **same user name** and the **same password** that you created when you first registered for your new account.

OC VANPOOL

Orange County
Transportation Authority

Login Authentication

User Name: *

Password: *

[Forgot Password?](#)

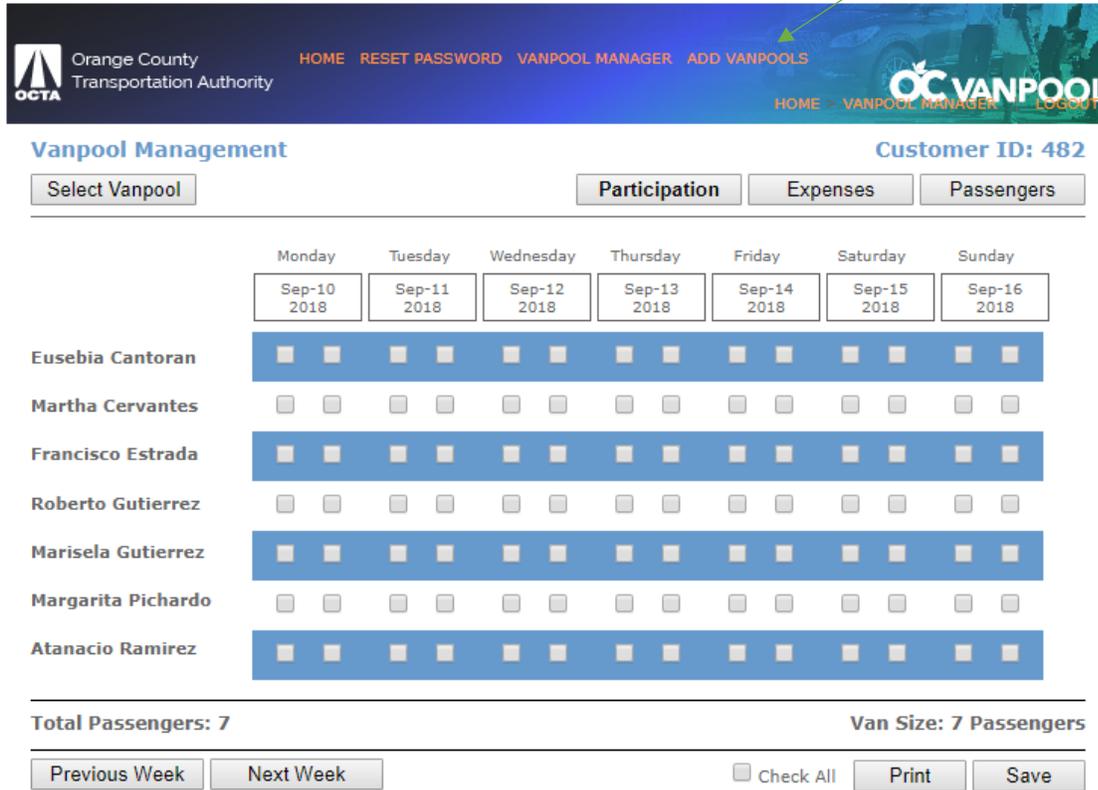
[Register For New Account / Forgot Username](#)

Having issues with this portal? Please download our new vanpool mobile app to report trips and expenses: [iPhone](#) / [Android](#)

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[Click here for Vanpool Home Page](#)

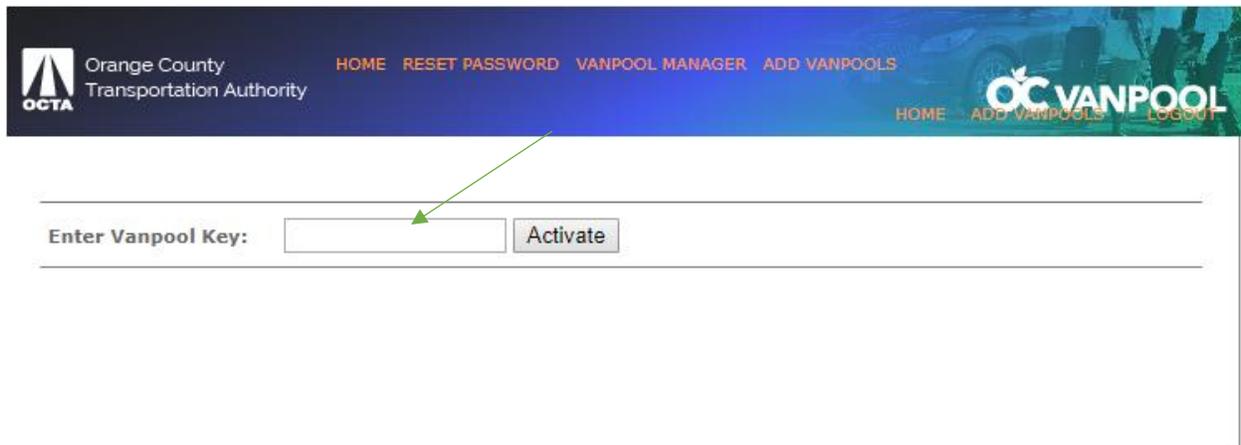
Step #2 – Click on the link “ADD VANPOOLS” at the top of your screen.



The screenshot shows the OC Vanpool Management interface. At the top, there is a navigation bar with the OC logo and the text "Orange County Transportation Authority". To the right of the logo are links for "HOME", "RESET PASSWORD", "VANPOOL MANAGER", and "ADD VANPOOLS". A green arrow points to the "ADD VANPOOLS" link. Below the navigation bar, the page title is "Vanpool Management" and the "Customer ID: 482" is displayed. There are three tabs: "Select Vanpool", "Participation", and "Expenses". The "Participation" tab is active. Below the tabs is a calendar grid for the week of September 10-16, 2018. The grid shows participation status for seven riders: Eusebia Cantoran, Martha Cervantes, Francisco Estrada, Roberto Gutierrez, Marisela Gutierrez, Margarita Pichardo, and Atanacio Ramirez. Each rider's row has a blue bar with white squares indicating participation on each day. Below the calendar, it says "Total Passengers: 7" and "Van Size: 7 Passengers". At the bottom, there are buttons for "Previous Week", "Next Week", "Check All", "Print", and "Save".

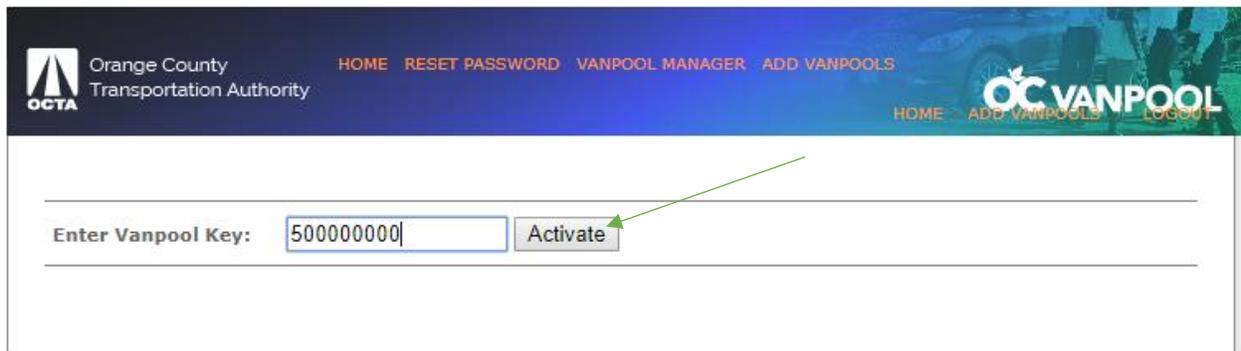
Please submit a signed OCTA Participant Agreement to your vanpool service provider to add a new rider.

Step #3 – Enter the vanpool key number that was provided to you in the “Welcome” email that OCTA sent for this vanpool. You will receive a vanpool key number each time you start a new vanpool that is qualified for the OC Vanpool program. You will not be able to add a new vanpool to your existing account without the vanpool key number.



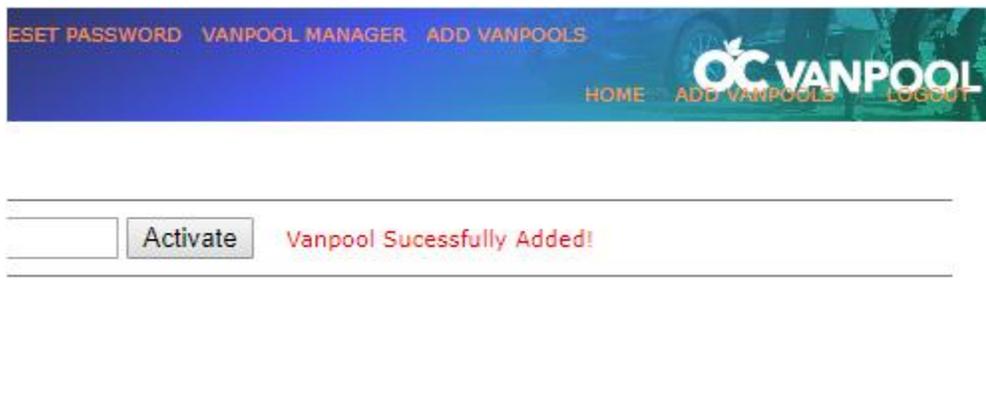
The screenshot shows the OC Vanpool Management interface. At the top, there is a navigation bar with the OC logo and the text "Orange County Transportation Authority". To the right of the logo are links for "HOME", "RESET PASSWORD", "VANPOOL MANAGER", and "ADD VANPOOLS". Below the navigation bar, the page title is "Vanpool Management" and the "Customer ID: 482" is displayed. There are three tabs: "Select Vanpool", "Participation", and "Expenses". The "Participation" tab is active. Below the tabs is a form with a label "Enter Vanpool Key:" and a text input field. A green arrow points to the input field. To the right of the input field is an "Activate" button.

Step #4 – Enter the vanpool key number and click the “Activate” button.



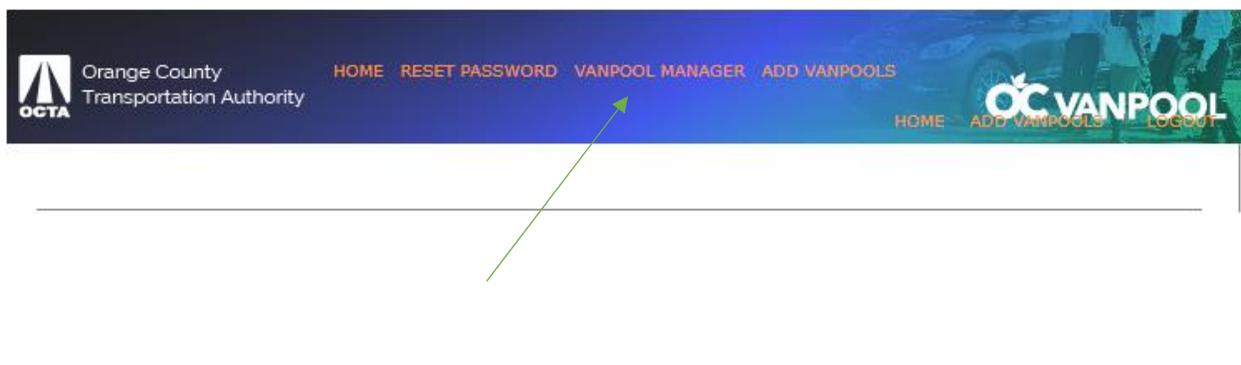
The screenshot shows the top navigation bar with the OCTA logo and links for HOME, RESET PASSWORD, VANPOOL MANAGER, and ADD VANPOOLS. The OC VANPOOL logo is also present with sub-links for HOME, ADD VANPOOLS, and LOGOUT. Below the navigation bar is a form with the label "Enter Vanpool Key:" followed by a text input field containing "500000000" and an "Activate" button. A green arrow points to the "Activate" button.

The screen will read “Vanpool Successfully Added”. Once the vanpool is added successfully, go to the top of your screen and click “Vanpool Manager”.



The screenshot shows the top navigation bar with links for RESET PASSWORD, VANPOOL MANAGER, and ADD VANPOOLS. The OC VANPOOL logo is also present with sub-links for HOME, ADD VANPOOLS, and LOGOUT. Below the navigation bar is a form with an "Activate" button and a red message that reads "Vanpool Successfully Added!".

To view all the vanpools associated with your account, click on the “Vanpool Manager” link on the top of the page.



The screenshot shows the top navigation bar with the OCTA logo and links for HOME, RESET PASSWORD, VANPOOL MANAGER, and ADD VANPOOLS. The OC VANPOOL logo is also present with sub-links for HOME, ADD VANPOOLS, and LOGOUT. A green arrow points to the "VANPOOL MANAGER" link in the navigation bar.

Step #5 – After clicking “Vanpool Manager”, a list of all your vanpools will be available. Click on “Select” to access more details on a specific vanpool associated with your account. There is an OC Vanpool customer ID number and an OC Vanpool key number associated with each vanpool group. Whoever has the vanpool key number can create an account and have access to report or view the account to ensure accurate, timely reporting



	CUSTOMER ID	DRIVER NAME	DATE APPROVED
Select	482	Eusebia Cantoran	2/1/2010
Select	1041	Trinidad Valdez	11/2/2015

Step #6 – You can begin reporting passenger trips and expenses. Don’t forget to hit “Save” before proceeding to the next week.

Orange County Transportation Authority

HOME RESET PASSWORD VANPOOL MANAGER ADD VANPOOLS

HOME VANPOOL MANAGER LOGOUT

Vanpool Management Customer ID: 1041

Select Vanpool Participation Expenses Passengers

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	Sep-10 2018	Sep-11 2018	Sep-12 2018	Sep-13 2018	Sep-14 2018	Sep-15 2018	Sep-16 2018
Janet Caldera	<input checked="" type="checkbox"/>						
Sylvia E. Estrella	<input type="checkbox"/>						
Alicia Martinez	<input checked="" type="checkbox"/>						
Leticia Montoya	<input type="checkbox"/>						
Rosa Pintor	<input checked="" type="checkbox"/>						
Trinidad Valdez	<input type="checkbox"/>						

Total Passengers: 6 Van Size: 7 Passengers

Previous Week Next Week Check All Print Save

Step #7 – When you are done reporting passenger trips and expenses, click on “Vanpool Manager” and you will return to the page showing a list of your vanpool groups, so you can select the next group.



3. Forgot Password

Step #1 – Go to Login Page vanpools@octa.net . Simply click “Forgot Password?”

Orange County Transportation Authority

OC VANPOOL LOGIN

Login Authentication

User Name:

Password:

[Forgot Password?](#)

Log In

[Register For New Account / Forgot Username](#)

Step #2 – Input your user name and hit “Submit” and you will be emailed instructions on how to reset your password. The email will be sent to the address used when you set up the account. You may need to check your spam folder. Suggestion: Copy and paste the “temporary password” that is given to you instead of trying to retype it.

Orange County Transportation Authority

OC VANPOOL LOGIN

Forgot Your Password?

Enter your User Name to receive your password.

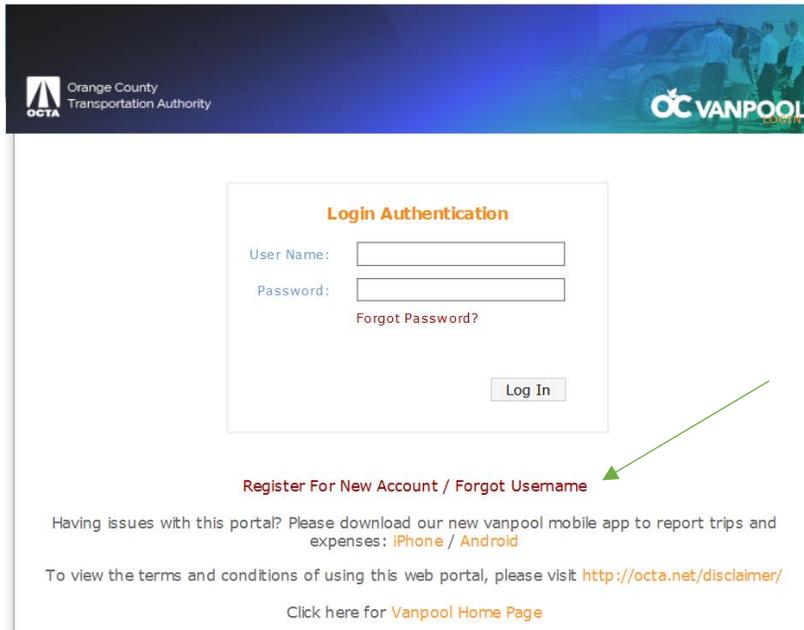
Note: You must have a valid Email address.

User Name:

Submit

4. Forgot User Name

Step #1 – You will need to register for a new account because user name retrieval is unavailable. Please click “Register for A New Account / Forgot Username” in the center of the page.



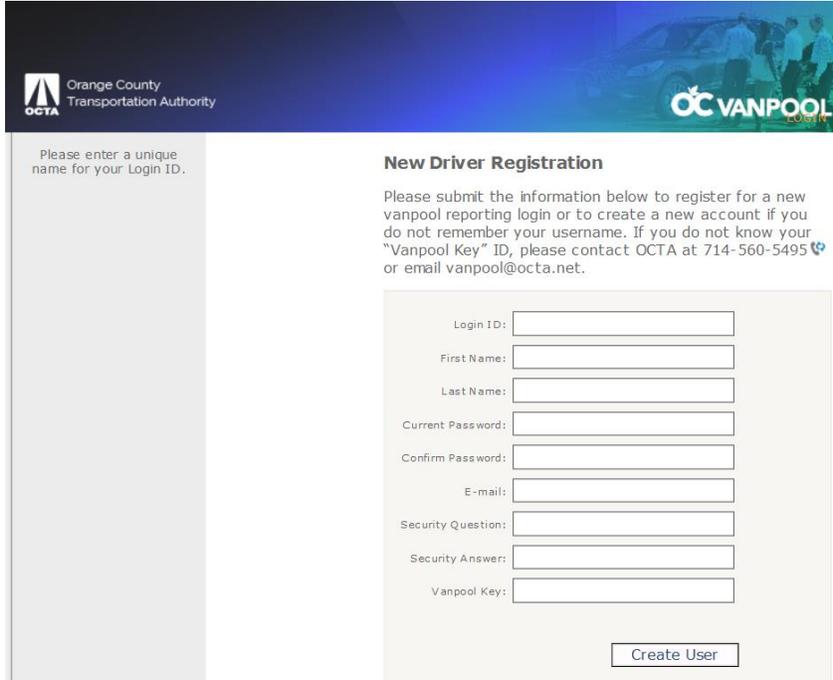
Step #2- Fill out your information on the next page by creating a unique login ID (which will become your user name) and create your password. **(You will not be able to use a previously created user name or password)**

The password must:

- 1 be at least 8 characters long – it will not accept ().
- 2 start with an alpha character.
- 3 have at least one upper case letter.
- 4 have at least one lower case letter.
- 5 have at least one number.
- 6 have at least one special character -! # \$ % &.

Please save the user name and password you created. You will need both to log in to your account each month. Remember that the password is case sensitive. Next, enter your email address. This is the email that you will be able to access easily when logging in. You will be asked to enter a security question (i.e.- what’s your favorite sports team, pet’s name, etc..). Enter the answer for the question you created. This feature will uniquely identify you when resetting account information. Finally, enter the vanpool key number you received in your email from OCTA. Click “Create User” to complete form.

If you do not remember your vanpool key number or cannot locate the email with the information, please contact vanpool@octa.net or call 714-560-5672 and it will be emailed to you. Once you have it, return here and complete the process.



The screenshot shows the 'New Driver Registration' page for OC Vanpool. The page header includes the OCTA logo and the text 'Orange County Transportation Authority' on the left, and the 'OC VANPOOL' logo on the right. A blue banner at the top features a photo of people in a van. The main content area is titled 'New Driver Registration' and contains the following text: 'Please submit the information below to register for a new vanpool reporting login or to create a new account if you do not remember your username. If you do not know your "Vanpool Key" ID, please contact OCTA at 714-560-5495 or email vanpool@octa.net.' Below this text is a registration form with the following fields: Login ID, First Name, Last Name, Current Password, Confirm Password, E-mail, Security Question, Security Answer, and Vanpool Key. A 'Create User' button is located at the bottom right of the form. On the left side of the page, there is a grey sidebar with the text: 'Please enter a unique name for your Login ID.'

5. How to Add a Passenger

Any passenger riding in a vanpool and participating in the OC Vanpool program must successfully complete an OC Vanpool Participation Agreement before their first trip in the van. Email the completed participant agreement to vanpool@octa.net. Only OCTA can add passengers to an account.

All information on the Participant Agreement must be accurate and consistent. The pick-up point must be consistent with the entire group and the miles to and from work must match the miles of passengers that are picked up at the same location. If the pick-up location is different, OCTA will call to verify. Incomplete Participant Agreements will not be accepted.

6. How to Delete a Passenger

Step #1 – Click on the “Passengers” tab to begin.

Logged in as: khewkin

Orange County Transportation Authority

HOME APPLICATIONS RESET PASSWORD VANPOOL MANAGER ADD VANPOOLS

HOME VANPOOL MANAGER LOGOUT

Vanpool Management **Customer ID: 32**

Select Vanpool Participation Expenses **Passengers**

	PASSENGER NAME	PICKUP LOCATION	MILES > WORK	MILES > HOME	DRIVER
Select	Jianing Cao	11000 National Blvd., Los Angeles	50	50	
Select	Wendy Chamorro	11000 National Blvd., Los Angeles	50	50	
Select	Lucie Dean	11000 National Blvd., Los Angeles	50	50	
Select	Luis Medina	11000 National Blvd., Los Angeles	50	50	
Select	Vijaykumar S. Meli	11000 National Blvd., Los Angeles	50	50	
Select	Jasmine Robledo	11000 National Blvd., Los Angeles	50	50	
Select	Weigang Yang	11000 National Blvd., Los Angeles	50	50	Yes

Delete Passenger

Step #2 –Select passenger to be deleted and their entry will be highlighted in yellow.

Vanpool Management **Customer ID: 32**

Select Vanpool Participation Expenses **Passengers**

	PASSENGER NAME	PICKUP LOCATION	MILES > WORK	MILES > HOME	DRIVER
Select	Jianing Cao	11000 National Blvd., Los Angeles	50	50	
Select	Wendy Chamorro	11000 National Blvd., Los Angeles	50	50	
Select	Lucie Dean	11000 National Blvd., Los Angeles	50	50	
Select	Luis Medina	11000 National Blvd., Los Angeles	50	50	
Select	Vijaykumar S. Meli	11000 National Blvd., Los Angeles	50	50	
Select	Jasmine Robledo	11000 National Blvd., Los Angeles	50	50	

Step #3 – Enter the date that they last rode in the van in the “Termination Date” box. That is the last day you will be able to enter trips for that passenger. Click “Delete Passenger” box once complete to finalize the change.

Vanpool Management
Customer ID: 32

Select Vanpool
Participation
Expenses
Passengers

	PASSENGER NAME	PICKUP LOCATION	MILES > WORK	MILES > HOME	DRIVER
Select	Jianing Cao	11000 National Blvd., Los Angeles	50	50	
Select	Wendy Chamorro	11000 National Blvd., Los Angeles	50	50	
Select	Lucie Dean	11000 National Blvd., Los Angeles	50	50	
Select	Luis Medina	11000 National Blvd., Los Angeles	50	50	
Select	Vijaykumar S. Meli	11000 National Blvd., Los Angeles	50	50	
Select	Jasmine Robledo	11000 National Blvd., Los Angeles	50	50	
Select	Weigang Yang	11000 National Blvd., Los Angeles	50	50	Yes

Termination Date:

Confirm
Cancel

Delete Passenger

7. Low Occupancy

The vanpool group is required to maintain a monthly participation level of 50% or greater. Participation is calculated by the number of seats occupied each month, not the number of passengers on the vanpool roster. If vanpool participation falls below 50%, the group has 90 days to add passengers or switch to a smaller van, unless they already have a 7-passenger vehicle. If the group is below 50% occupancy for three consecutive months, the OC Vanpool subsidy will be declined in the following month until ridership reaches 50%.

8. Deadline for Reporting

The vanpool coordinator is required to report all trips and expenses in full by the 10th of the following month (i.e. March report April 10th). If the vanpool report was not received or was received after the 10th of the month for passenger trips and vanpool expenses, the group becomes ineligible for the \$400 vanpool subsidy.

Note: if you do not report trips and/or expenses, you will be denied the \$400 subsidy for that month. There is no grace period for incomplete reports or failure to report.

9. Terminating a Vanpool

To remain eligible for the vanpool subsidy up to the termination date, please report the trips and expenses up to the last day the vanpool operates. Once your account is closed, you will not be able to report participation trips or expenses.