OC VANPOOL

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

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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.

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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.

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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.

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.

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Participation tab to report passenger trips

Check box if passenger rode home that day

Check box if passenger rode to work that day

Logged in as: khewkin

OCTA 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

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	Mar-06 2017	Mar-07 2017	Mar-08 2017	Mar-09 2017	Mar-10 2017	Mar-11 2017	Mar-12 2017
Jianing Cao	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐
Wendy Chamorro	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐
Lucie Dean	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐
Luis Medina	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐
Vijaykumar S. Meli	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐
Jasmine Robledo	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐
Weigang Yang	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐	☐ ☐

Total Passengers: 7 **Van Size: 7 Passengers**

Previous Week Next Week ☐ Check All Print Save

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

<u>Step #6</u> - 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 <u>actual</u> 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.

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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.

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

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.

Step #4 – Enter the vanpool key number and click 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".

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

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

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

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.

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3. Forgot Password

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

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.

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.
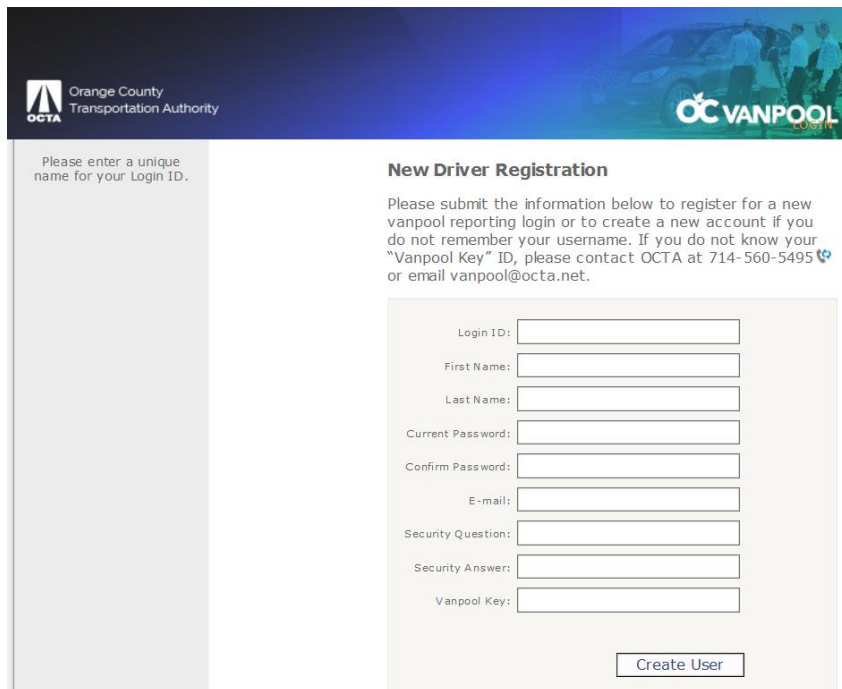

Step #2- Fill out your information on the next page by creating a unique login ID (which will become your user name) and create your password. **(You will not be able to use a previously created user name or password)**

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.

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.

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6. How to Delete a Passenger

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

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

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.

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.