



Step-by-Step Reporting Instruction Guide for Coordinators

On behalf of the Orange County Transportation Authority (OCTA), thank you for participating in the OC Vanpool program. It's a smart decision to share the ride while saving money and time and reducing stress and personal vehicle miles.

OCTA receives grant funding from the Federal Transit Administration (FTA) Urbanized Area Formula Program. This money is the basis for the \$400 monthly subsidy we provided 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.

You 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 of each month. If you fail to report or report after the 10th of the month, you will not receive the \$400 vanpool 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 it 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.

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](#)

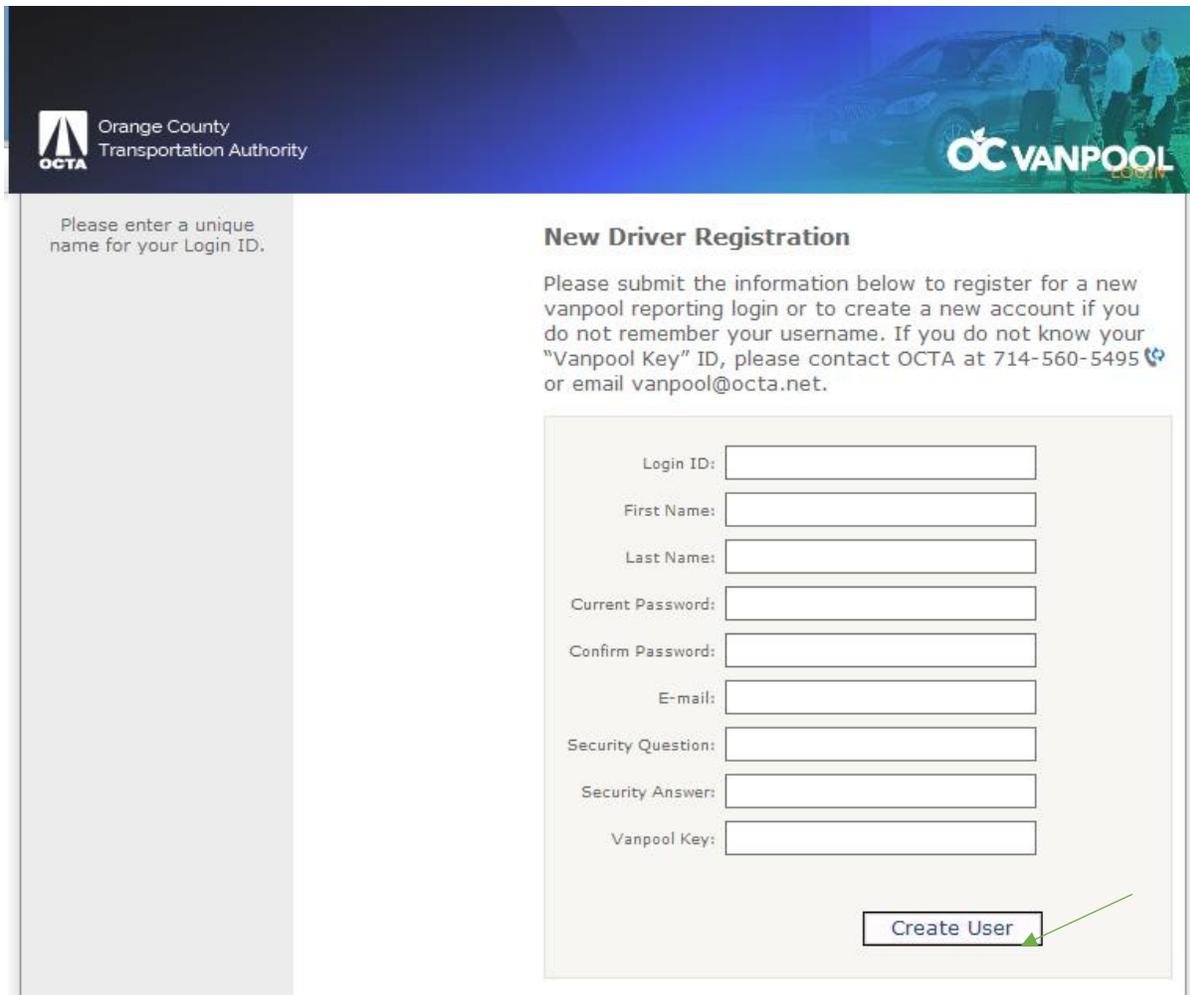
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Step #3 – Fill out your information on the next page by creating a unique login ID (which will become your user name) and create your password.

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. Below the header, there is a grey box on the left with the text 'Please enter a unique name for your Login ID.' The main form 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.' The form fields are: 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 checkmark pointing to it.

Congratulations! You have successfully registered! Click the "Finish" button to bring up your account.

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 – Your current list of passengers should appear on the "Participation" page. Please verify that all your passengers are displayed so you can begin reporting trips. You 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.

Logged in as: khewkin

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	<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

Existing passenger list

This is your OC vanpool Customer ID

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 rider didn't ride to work in the vanpool or home in the vanpool, please do not check the box. 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 the van you must delete the passenger who 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.

The screenshot shows the 'Participation' tab in the OC Vanpool Management system. The interface includes a navigation bar with 'HOME', 'APPLICATIONS', 'RESET PASSWORD', 'VANPOOL MANAGER', and 'ADD VANPOOLS'. The user is logged in as 'khewkin'. The main content area is titled 'Vanpool Management' and shows a grid for reporting passenger participation for the week of March 6-12, 2017. The grid lists seven passengers: Jianing Cao, Wendy Chamorro, Lucie Dean, Luis Medina, Vijaykumar S. Meli, Jasmine Robledo, and Weigang Yang. Each passenger has two checkboxes per day: one for riding to work and one for riding home. The 'Total Passengers: 7' and 'Van Size: 7 Passengers' are displayed at the bottom. Navigation buttons for 'Previous Week' and 'Next Week' are on the left, and 'Check All', 'Print', and 'Save' buttons are on the right. Annotations with arrows point to various elements: 'Participation tab to report passenger' points to the 'Participation' button; 'Check box if passenger rode home that day' points to the right checkbox in the first row; 'Check box if passenger rode to work that' points to the left checkbox in the first row; 'Click "Next Week" button after hitting "Save" button to report for next week' points to the 'Next Week' button; '"Check All" box will populate all passenger boxes at one time' points to the 'Check All' checkbox; and 'Hit "Save" button after you report trips and before you move to next week' points to the 'Save' button.

Participation tab to report passenger

Logged in as: khewkin

Orange County Transportation Authority

HOME APPLICATIONS RESET PASSWORD VANPOOL MANAGER ADD VANPOOLS

OC VANPOOL

HOME - VANPOOL MANAGER LOGOUT

Vanpool Management 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"/> <input checked="" type="checkbox"/>						
Wendy Chamorro	<input type="checkbox"/> <input type="checkbox"/>						
Lucie Dean	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>						
Luis Medina	<input type="checkbox"/> <input type="checkbox"/>						
Vijaykumar S. Meli	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>						
Jasmine Robledo	<input type="checkbox"/> <input type="checkbox"/>						
Weigang Yang	<input checked="" type="checkbox"/> <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

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 week

Step #6 - Click "Expenses" tab to be taken to the page where you must report your monthly vanpool expenses. Expenses should always include fuel, gallons purchased, and car washes; if road tolls are required, include those as well.

OCVA Orange County Transportation Authority

HOME APPLICATIONS RESET PASSWORD VANPOOL MANAGER ADD VANPOOLS

OC VANPOOL HOME VANPOOL MANAGER LOGOUT

Logged in as: khewkin

Customer ID: 32

Vanpool Management

Select Vanpool Participation **Expenses** Passengers

Expense Type Amount Gal of Fuel Date Add Expense

- Please Select - \$ [] [] []

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

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 that cost. Do not enter estimates. Input the date of the month 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.

Expense Type

- Please Select -

Fuel Costs

Road Tolls

Car Wash

Parking

01/16/2017

Step #8 –Ensure accuracy 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” button.

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 reported expenses 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. Forgot Password

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



Orange County Transportation Authority

OC VANPOOL

Login Authentication

User Name:

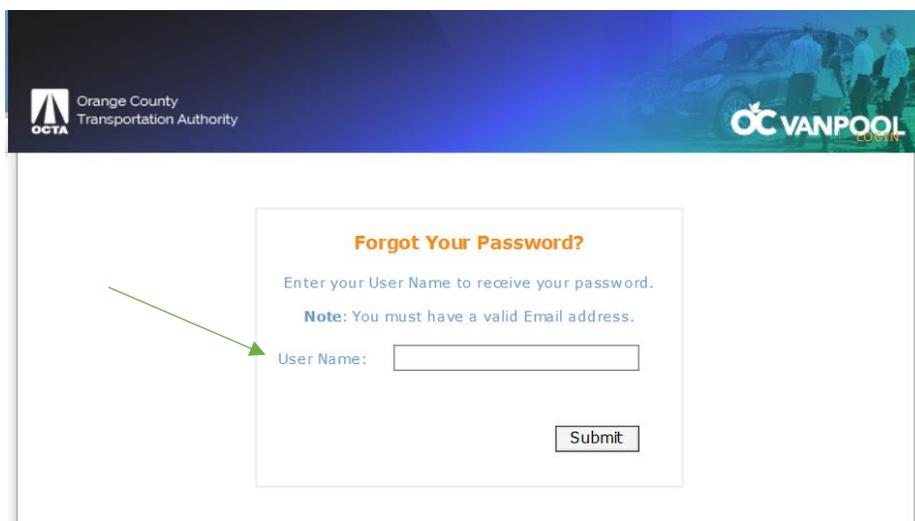
Password:

[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

Forgot Your Password?

Enter your User Name to receive your password.

Note: You must have a valid Email address.

User Name:

Submit

3. 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.

OC VANPOOL LOGIN

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](#)

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

Click here for [Vanpool Home Page](#)

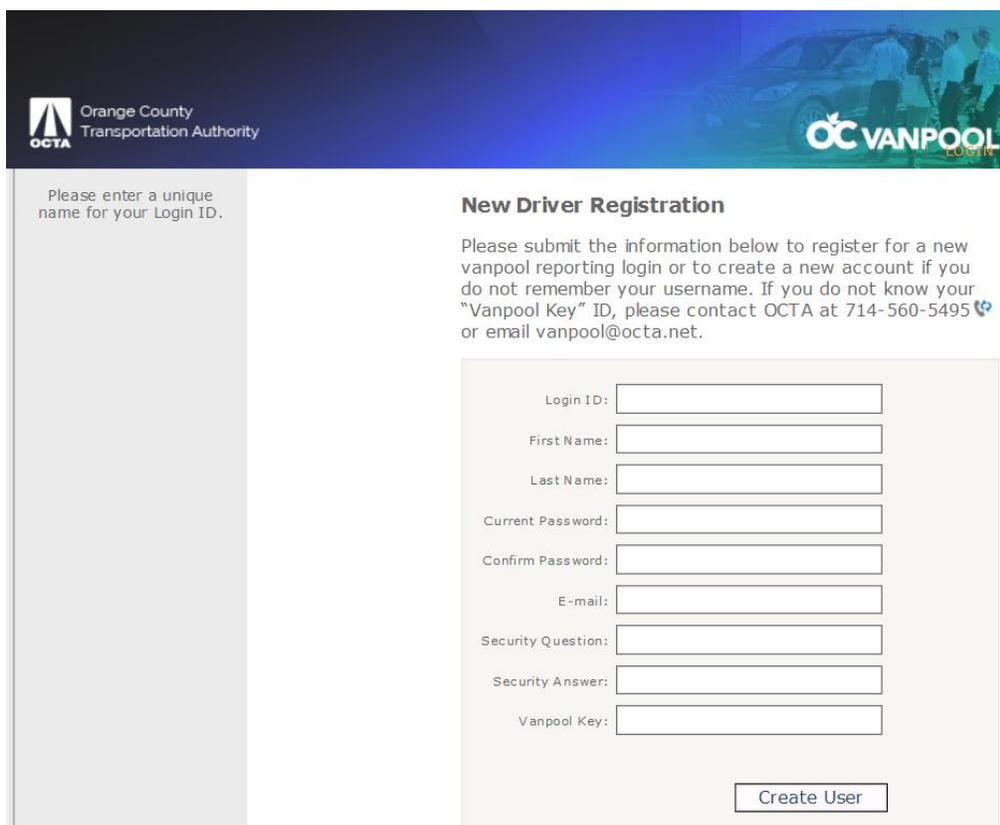
Step #2- Fill out your information on the next page by creating a unique login ID (which is your user name) and create a password. **(You will not be able to use a previously created user name or password.)**

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 login into 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' form on the OC Vanpool website. The header includes the Orange County Transportation Authority (OCTA) logo and the OC Vanpool logo. The form contains the following fields:

- Login ID:
- First Name:
- Last Name:
- Current Password:
- Confirm Password:
- E-mail:
- Security Question:
- Security Answer:
- Vanpool Key:

A 'Create User' button is located at the bottom right of the form area.

4. How to Add a Passenger

Any passenger riding in a vanpool in the OC Vanpool program must successfully complete an OC Vanpool Participant Agreement before their first trip in the van. Email the completed participant agreement to vanpool@octa.net. Only OCTA will be able to 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 picked up at the same location. If the location is different, OCTA will call to verify. Incomplete Participant Agreements will not be accepted.

5. How to Delete a Passenger

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

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 content area is titled "Vanpool Management" and shows "Customer ID: 32". There are three tabs: "Participation", "Expenses", and "Passengers". The "Passengers" tab is selected. Below the tabs is a table with the following data:

	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

At the bottom right of the table area, there is a "Delete Passenger" button.

Step #2 –Select a 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 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**



6. Low Occupancy

The vanpool group is required to maintain a monthly occupancy 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 a vanpool falls below 50% occupancy, 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%.

7. 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.

8. 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.