



OC Vanpool User Guide

The Orange County Transportation Authority (OCTA) welcomes you to the OC Vanpool Program. It's a smart decision to share the ride to work every day while saving money and time and reducing stress and personal vehicle miles.

OCTA is a Federal Transit Administration (FTA) grant recipient of funding from the Urbanized Area Formula Program. This funding is the basis for the \$600.00 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 the vanpool groups. On-time, accurate reporting is necessary for the success of the OC Vanpool Program.

When you qualify for the OC Vanpool Program, it is important that you continue to do your part to receive the \$600 monthly vanpool subsidy. All vanpool groups participating in the OC Vanpool Program are required to report passenger trips and vanpool expenses by the 10th day of each month.

To begin, log in to <https://vanpools.octa.net/>. We recommend that you log in using one of the following compatible web-browsers: Windows Internet Explorer Version 8 or higher; or the latest versions of Apple's Safari, Google's Chrome or Firefox. If you are completing the monthly reporting from a mobile device, please ensure the device is updated with the most recent operating platform.

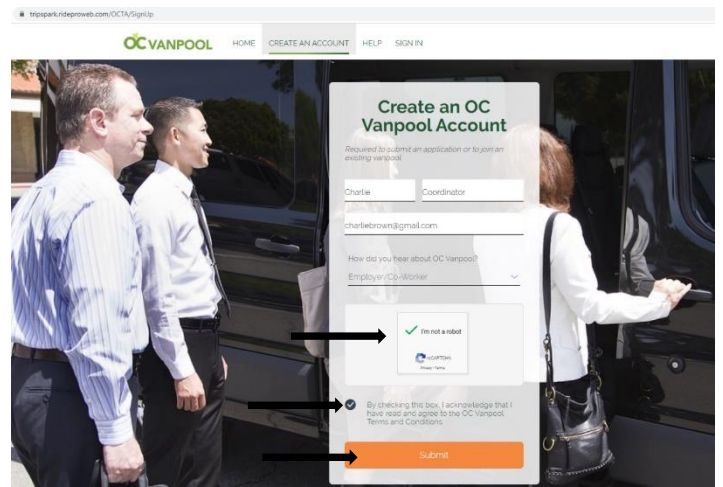
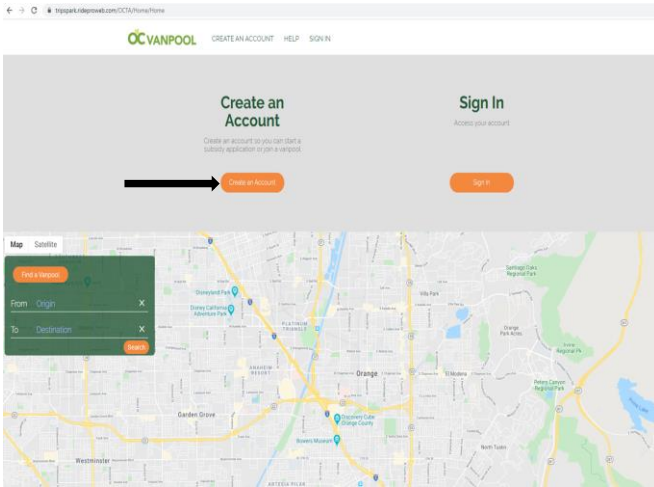
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1. How to apply for the OC Vanpool Program

STEP ONE

Please open the following link: <https://vanpools.octa.net/>



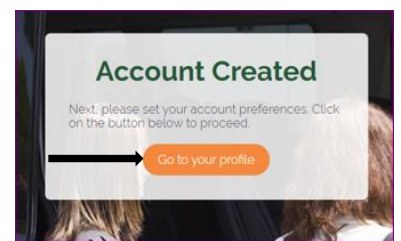
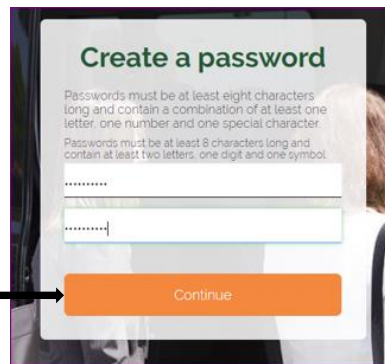
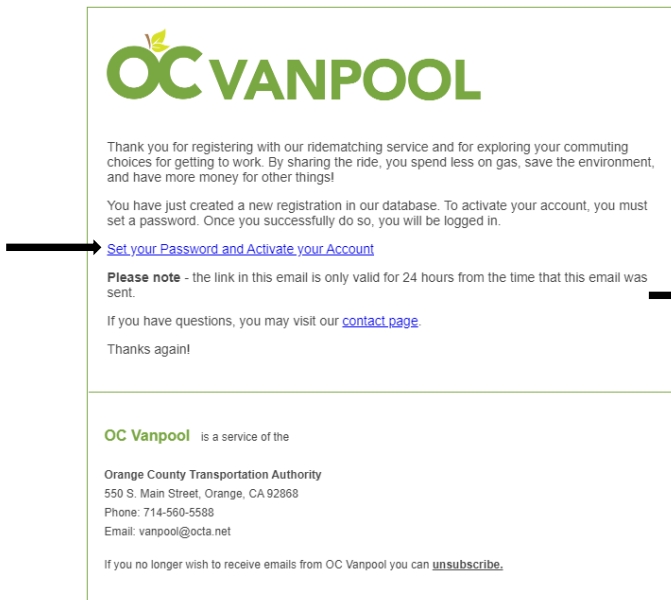
STEP TWO

Check your email inbox or spam folder for your account activation email. It contains a link to create a password for your OC Vanpool Account.



STEP THREE

Click on the activation link provided in the email and create your password. It must be at least 8 characters long and contain at least two letters, one number, and one symbol.



STEP FOUR

Fill out the information for your profile.

The 'My Profile' form consists of three sequential screens:

- Screen 1:** Shows a 'Return' button, a profile picture placeholder, and fields for Name (Charlie), Title (Coordinator), Email (charliecoordinator@gmail.com), and Phone (123-456-7890). A right arrow indicates the next step.
- Screen 2:** Shows 'Home Address (no PO boxes)' and 'Address' fields. The address is '123 Appletree, Orange, CA 92840'. A note states 'Home Address will be confidential'. A right arrow indicates the next step.
- Screen 3:** Shows 'Work Location' (Test Company, 1234 Pinetree, Orange, CA 92840) and 'Work Start Time' (8:00 AM) and 'Work End Time' (5:00 PM). A 'Done' button is at the bottom.

STEP FIVE

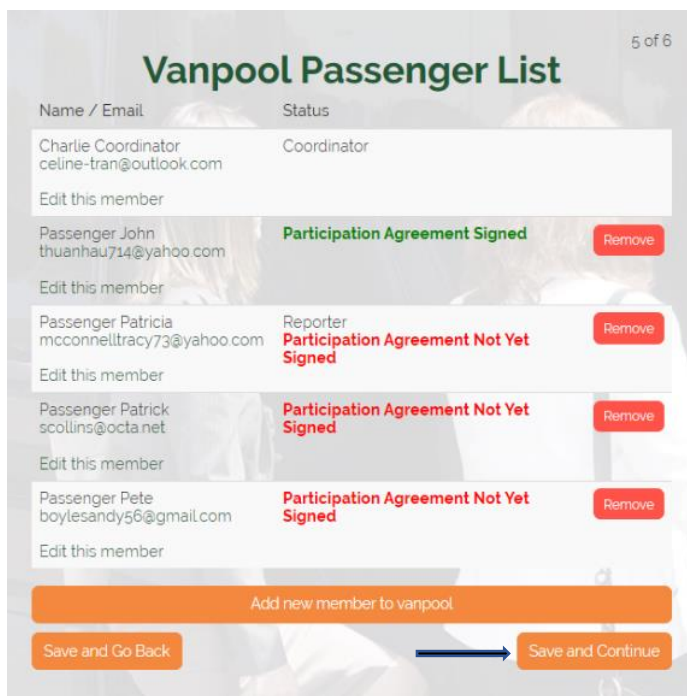
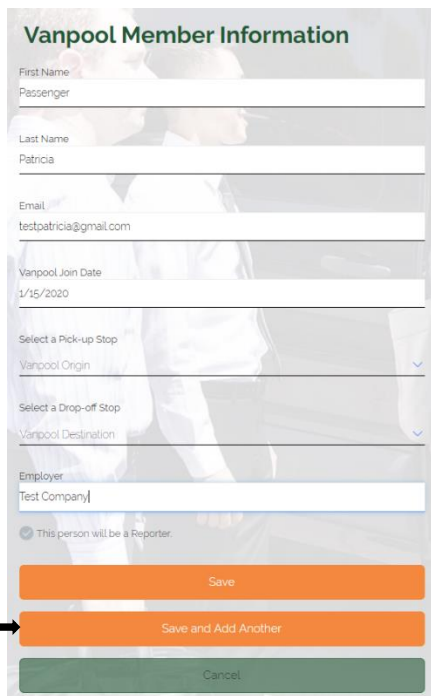
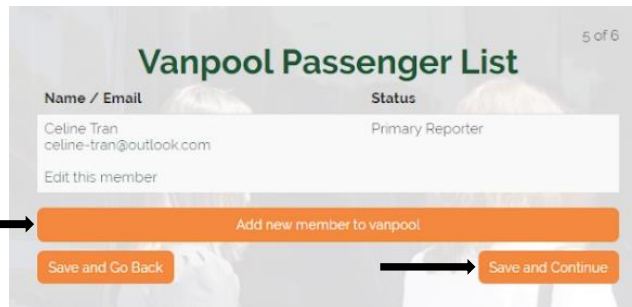
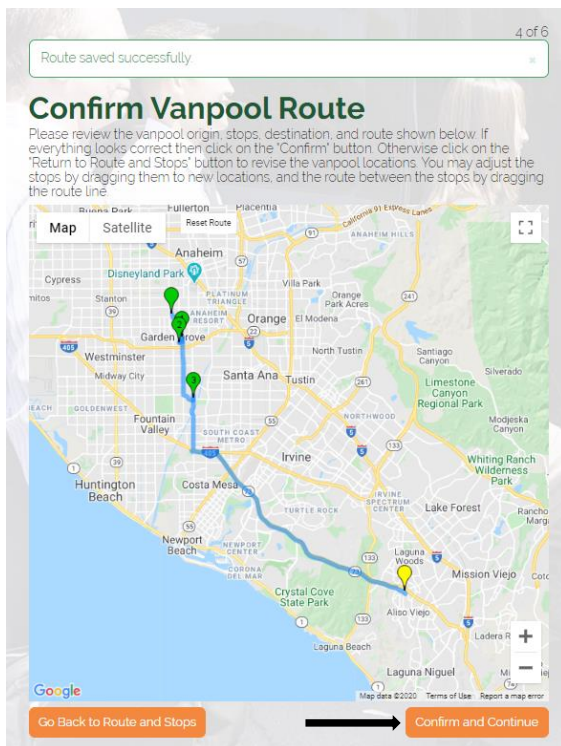
Fill out the information for your vanpool.

The vanpool information form consists of three sequential screens:

- Vanpool General Information:** Fields for Vanpool Driver Name (Charlie Coordinator), Vehicle Leasing Vendor (Enterprise), Date of First Ride (1/15/2020), and Vehicle Size (7). A 'Save and Continue' button is at the bottom.
- Vanpool Schedule:** Fields for Going Trip (Start Time: 7:30 AM, Arrive Time: 8:00 AM) and Returning Trip (Start Time: 5:00 PM, Arrive Time: 5:30 PM). Operating days are selected (Sun, Mon, Tue, Wed, Thu, Fri, Sat). A 'Save and Continue' button is at the bottom.
- Route:** Fields for Origin (123 Apple Tree, Orange, CA 92840) and Work Address (1234 Test Company, Orange, CA 92840). A section for 'Additional Pick-up and Drop-off Stops' includes an 'Add a Stop' button.

The 'Add a Stop' dialog includes fields for Name (Test Passenger), Address (Test Pick-up Point), and a dropdown for 'Pick-up or Drop-off on Route from Home to Work' (Pick-up (Riders get on)).

Tip: You can give each stop a name to give the address more context (e.g. Vons on Magnolia St. and Atlanta Ave., 7-11 on Bristol and W MacArthur Blvd).



STEP SIX

Once you have filled out your profile, vanpool general information, and added all your passengers, carefully review your application before submitting. Please note that once your application is submitted, you are not permitted to go back to make any changes or updates. When you have reviewed all information for accuracy, you are ready to submit your application.

Vanpool Participation Agreement

You are being asked to read and sign this agreement because you are a member of this vanpool.

Vanpool: **VO1395 - Celine Tran**
 Coordinator: **Charlie Coordinator**
 From: 11761 S Della Ln, Garden Grove, CA 92840
 To: 35 Enterprise, Aliso Viejo, CA 92656
 Going Trip: 5:30 AM - 6:00 AM
 Returning Trip: 3:30 PM - 4:00 PM

ORANGE COUNTY TRANSPORTATION AUTHORITY
 OC VANPOOL PROGRAM PARTICIPANT AGREEMENT

Vanpool ID: VO1395

EACH VANPOOL PARTICIPANT MUST SIGN AND SUBMIT A COPY OF THIS AGREEMENT.

I, the undersigned, hereinafter called "Participant" have read, acknowledge and agree to abide by the OCTA Vanpool Program Participation Guidelines. Participant acknowledges that inappropriate use of the OCTA Vanpool Program service may require Participant to reimburse expenses incurred to the Orange County Transportation Authority, hereinafter called "OCTA" and to remove participant from the program.

Participant recognizes that participation in the OCTA Vanpool Program is strictly voluntary and that such participation does not, in any manner, imply that Participant is acting in the course and scope of official company business, nor does it in any manner establish an employer-employee or an agency relationship with the OCTA.

In consideration of Participant's request and OCTA's permission to participate in the OCTA Vanpool Program, Participant hereby assumes full responsibility and all risk of injury and loss, including death, which may result from such participation, and hereby agrees to hold harmless, release, waive, forever discharge, and covenant not to sue or bring claims against the OCTA its officers, directors, agents or employees, by reason of accident, illness, injury or death, or damage to or loss or destruction of any property arising or resulting directly or indirectly from such participation in the OCTA Vanpool Program and occurring during said participation, or any time subsequent thereto, whether or not such loss, injury or death caused or alleged to be caused in whole or in part by the negligent acts or omissions of the OCTA, its officers, directors, agents or employees. The terms of this release shall serve as a release and assumption of risks for my heirs, executors, administrators and for my family members.

Participant acknowledges reading the foregoing paragraphs and understands the potential risks incidental to engaging in the OCTA Vanpool Program. Participant further acknowledges that:

- The OCTA Vanpool Program may be cancelled or changed at any time, without obligation, at the sole discretion of the OCTA. A Participant Agreement must be submitted to OCTA prior to a Participant's first ride in the vanpool.
- The vanpool is open to the public and must accept any person wishing to join the

- submitted to OCTA prior to a participant's first ride in the vanpool.
- The vanpool is open to the public and must accept any person wishing to join the vanpool provided such schedules and routes are compatible. By submitting this Agreement, Participant agrees that the information provided will be entered into the regional ride share database. RideShareInfo. Participant understands that the information provided will only be used for the purpose of matching interested riders to the vanpool group. Participant agrees that only OCTA can use their contact information for computer marketing purposes, and they reserve the right to opt-out at any time.
- Agree
- A monthly report detailing daily passenger participation and all vanpool expenses must be submitted to OCTA prior by the 10th day of each month for the previous month. Actual monthly ridership in the vanpool must exceed 80% occupancy. Failure to maintain 80% occupancy level for three (3) consecutive months will result in a suspension of subsidy, until occupancy is increased to minimum requirement level.
- Agree
- OCTA reserves the right to withhold subsidy payments or to terminate a vanpool from the program for failure to submit monthly reports as specified by OCTA or for failure to provide timely responses to reasonable requests for information such as, but not limited to, those listed in the "Participation Guidelines".
- OCTA retains the right to deny funding for any new vanpool or to close a vanpool if its existing list, due to terminate the funding of a vanpool if OCTA deems that it is in the best interest of the agency and program to do so.
- The OCTA Vanpool Program is compliant with the Americans with Disabilities Act (ADA) and open to the public. Accessible vehicles are available from the vanpool service provider upon request. NOTICE OF TITLE VI VIOLATIONS is the policy of OCTA to employ, in best efforts to ensure that all programs, services, and activities are implemented without discrimination. For more information on OCTA's title rights program, and the procedures to file a complaint, please visit OCTA.net.

Please enter the name/address of where you get on and get off of your vanpool.

123 Apple Tree, Orange, CA 92840

1234 Test Company, Orange, CA 92840

Participant Authorization By checking the box below and writing my name in below, and submitting this Agreement, I represent that I am authorized to enter into this Agreement, the information provided herein is true, and I have read and understand the contents and conditions.

Agree

Participant Signature Enter your full legal name (at a minimum your first and last name below) and provide your signature. The use of a digital signature shall have the same force and effect as the use of a manual signature.

Charlie Coordinator



Clear Signature Thursday, August 12, 2020

You have successfully submitted your participation agreement.

Thank you!

Your OC Vanpool Vanpool Application has been submitted to OCTA for review. Your vanpool participants will receive a welcome email asking them to create an OC Vanpool Profile, username and password for access to our website. They will need to log on, agree to and electronically sign and submit a Participation Agreement. Your OC Vanpool Program application will not be approved until all required Participation Agreements are submitted.

If you have any questions regarding your Application, please contact OCTA at vanpool@octa.net or call us at 714-560-5588.

Application Status

Vanpool: **VO1395 - Celine Tran**
 From: 11761 S Della Ln, Garden Grove, CA 92840
 To: 35 Enterprise, Aliso Viejo, CA 92656
 Leasing Vendor: Enterprise

Status: Application Submitted, confirmed by participants, and awaiting review by the Leasing Vendor and OC Vanpool

Passenger List

Name / Email	Status
Charlie Coordinator celine-tran@outlook.com Coordinator	Participation Agreement Signed
Passenger John thuanhau714@yahoo.com	Participation Agreement Signed
Tracy McConnell tcatmcconnell@gmail.com	Participation Agreement Signed
Passenger Patricia	Participation Agreement Signed
	Agreement Signed

Once all of your passengers have signed the participant agreement on-line, OC Vanpool staff will review your application. Please log into your account periodically to check the status of your application.

If you need assistance, please email vanpool@octa.net or call 714-560-5588

2. Monthly Reporting Requirements.

To be considered for the monthly OC Vanpool subsidy, you must submit an accurate monthly report which includes reporting the month-end odometer miles, passenger ridership and vanpool expenses such as fuel, van wash, tolls, and parking expenses that occurred during the month. Your vanpool's report is based on a calendar month period and must be submitted on <https://ocvanpool.rideproweb.com> or on the OC Vanpool mobile application by the 10th day of each month. (i.e. – July report is due on August 10th).

A. Report activity from the first day of your commute in the vanpool and forward. For example, if your vehicle is delivered on July 6th but the first day you and your group began vanpooling was July 7th, then begin reporting your passenger trips and expenses beginning on July 7th.

Important Tips

Adding New Passenger	When adding a new passenger, an email will be sent to that person with instructions for creating an account or signing into https://ocvanpool.rideprotweb.com to review and sign an online Participation Agreement. Make sure that the passenger has the address of where they are boarding the vanpool and the address of their destination.
Updates	If there are ANY changes, update them before you begin a new monthly report.
Save Your Work	Click "Save Ridership" or "Save and Continue" to save ridership entries or else your entries will be lost.
Odometer Reading	On the last day of your commute each month, record the odometer reading to complete your monthly report.

3. Signing into the Monthly Reporting Module.

Please open the following link: <https://ocvanpool.rideproweb.com/>

Tip: If you forget your password click **Forgot Password** and you will be emailed a link to create a new password.

4. Creating a New Monthly Report. OC Vanpool recommends you not create a new monthly report until the prior month's report has been submitted. To find an existing Monthly Report, click the **Find Report** tab, search for the month you want to report for, and click **Edit**.

Once you are signed in, you will first see the “**New Monthly Report**” page where you verify and confirm your schedule and route before creating your first report.

- A. Each time a new report is created, you are required to verify the accuracy of the vanpool **Schedule, Route, and Passenger List**. If any of this information has changed, update these sections by clicking the blue **Update** link beneath each section. See [Section 8 – Updating Vanpool Information](#) for further information.

Important – If there are ANY changes, update them before you begin logging information into your new monthly report.

- B. **Read** the statement and upon confirmation, check the “**I confirm**” box.
- C. **Select** the Reporting Month and Year of the report you are creating.
- D. Click **Create**.

5. **Completing a Monthly Report.** Beginning on the first day you and your passengers commute in the vanpool, track and log your daily passenger trips (the actual rides taken by the passengers each day) and vanpool expenses incurred (i.e. fuel, washes, tolls, parking). **You must also enter your vans ending odometer reading at the end of each month.** This section will describe the steps for creating, completing, and submitting your OC Vanpool monthly report.

A. **Reporting Ridership** – From the Monthly Ridership Calendar, the current day will always be highlighted in pale yellow. Each day that has a completed ridership report will be shaded green. Click on the day you want to log passenger rides, you will be directed to the **Daily Ridership** form.

Ridership for Tuesday 3/3/2020
 Vanpool: VO1395 - Charlie Coordinator
 Confirm travel time/miles and select which riders rode in/out for the day

Travel Time to Work (minutes): 30
 Distance to Work (miles): 23.36

Travel Time from Work (minutes): 30
 Distance from Work (miles): 22.91

(Select All)

Name	Rode In / Out
Charlie Coordinator Driver	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Passenger John Rider	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Tracy McConnell Rider	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Passenger Patricia Rider	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Passenger Patrick Rider	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

Buttons: Save and Go Back, Save Ridership, Save and Continue, Month View

Tip: To view your Monthly Ridership Calendar at any time, click the **“Month View”** button toward the bottom of the Daily Ridership form.

Once you are done completing the reporting for the day, click **“Save and Continue.”**

If you are reporting at month end and you have finished logging all your daily passenger trips, click **“Month View”** and then click at the bottom of the calendar to move to the next section of the reporting process.

Begin logging your passenger trips starting on the first day of your vanpool commute. Check the buttons for each ride a passenger took to work and from work for the day.

- B. **Expenses** – This section is for entering all the expenses incurred during the month, such as fuel, van wash, tolls, and parking. Enter expenses as noted below, even if your employer paid for some or all the expenses.
- Select the **Expense Type**, enter the **Quantity**, **Total Cost**, and click **Add**.

Tip: For all other expenses aside from fuel, identify at least a “1” in this field so that you may proceed.

- b. **Comments** – you may add any comments you believe may be of assistance OC Vanpool regarding the expense type.
- c. If you made an entry error, click **Delete** to remove the entry and re-enter the expense (the system does not have the ability to edit an entry once it has been saved).
- d. Once you have entered all your **Expenses** for the current reporting month, continue by clicking .

You may enter a monthly total for each of **Expense category** incurred during the report month or enter the expenses individually for each type of expense. For example, if during the month you purchased a total of 250 gallons of fuel and spent a total of \$800, this can be reported as one entry. Or, you can enter each fuel purchase individually as they occur during the report month.

- C. **Vehicles** – In this section you will confirm your vehicle information. The system will display the year, make, model, leasing vendor, vehicle ID and number of seats in your vanpool vehicle. The start and end day and your starting odometer will be pre-populated. **You will be required to enter your ending odometer reading.** The ending odometer reading should be taken when the vehicle is parked at the home end on the last commute day of the month.

If you had more than one vehicle assigned to you during a reporting month, you only need to complete this information for the vehicle that was in your possession on the last day of the report month. If this report does NOT show the vanpool vehicle currently assigned to you, or if you were assigned a new or loaner vehicle on the last day of the reporting month, please email vanpool@octa.net.

- a. **Starting Odometer** – Confirm your starting odometer. Your *Starting Odometer* will be automatically pre-populated each month with the prior month’s *Ending Odometer*.
- b. **Ending Odometer** – Complete this section by entering the *Ending Odometer* of the vehicle at the time the vehicle is parked on the last day of the reporting month at the home end.

D. **Submit** – If all Passenger Trips, Expenses, and Vehicle information has been reported and verified, the final section of the monthly report will be to confirm the number of vehicles used during the reporting month and to confirm that the report information is complete and accurate.

a. **Comments** – You may enter any pertinent information, comments or concerns you wish to share with OC Vanpool about this reporting month, such as information regarding a vehicle change during the period.

- The same vehicle was used for this entire reporting period.
- Multiple vehicles were used during the course of this reporting period.

I confirm that my passenger list is correct, and that no additions or deletions need to be made. All information in this report is complete and correct.

Submit



b. Read the statement “*I Confirm that my vanpool report is correct*” and check the box upon confirmation. Before you click submit, use to review your entries carefully and edit if necessary. **Important** – *Once submitted, your report will be locked for review and you will not be able to make further changes.*

c. If you receive an error messages and the System is unable to submit your report, please correct the errors noted. If you are having trouble correcting the errors, or if you submitted the report and then found that changes are required, contact OC Vanpool to re-open your report.

- i. contact OCTA at vanpool@octa.net or 714-560-5588.
- ii. After correcting any errors, click **Submit**.

d. **Congratulations!** You have submitted your OC Vanpool monthly vanpool report. You will receive an email from OC Vanpool confirming receipt of the report. The OC Vanpool will review your report and if necessary, may contact you or your Reporter(s) with questions.

6. **Expanded Report Menu (Side Bar Menu).** The **Report Menu** can be found on the top left corner of the page. This expanded side bar menu allows you to easily move through each of the reporting sections, where you can search/find a monthly report, complete the various sections, submit your monthly report, and access quick links to **Update Your Vanpool** and **Rider Search**.

- Monthly Vanpool Reporting
- Find Report
- Ridership
- Expenses
- Ending Odometer
- Submit
- Update My Vanpool
- Rider Search
- Desktop View

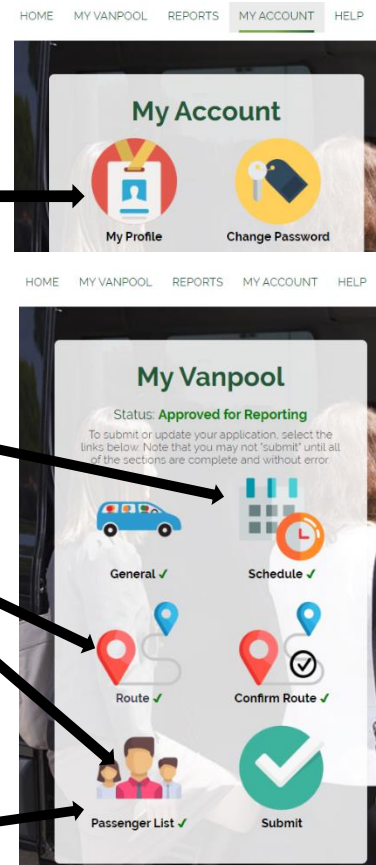
- A. **Find Report** – Allows you to search for a submitted or pending monthly report. Select “View” to review a previously submitted report or “Edit” to work on the current month’s report.
- B. **Ridership** – Directs you to the current Ridership month calendar, where you can select a day and add which riders rode the vanpool to and from work.
- C. **Expenses** – Track and enter the out of pocket expenses the vanpool incurred during the month, such as fuel, cleaning, tolls, or parking.
- D. **Ending Odometer** – Enter your vehicle’s ending odometer on your monthly report each month.
- E. **Submit** – Confirm and submit your monthly report.
- F. **Update My Vanpool** – Update your Route, Schedule and/or current list of passengers.
- G. **Rider Search** – Use this to search for interested vanpool riders near your vanpool route.
- H. **Desktop View** – Provides a monthly view for reporting Passenger rides.

7. **OC Vanpool Payment of the Monthly Subsidy.** OC Vanpool staff will notify you by email if you do not qualify for the OC Vanpool subsidy. The OC Vanpool subsidy will appear on the invoice you receive from your vanpool provider.

Need Assistance – Please email vanpool@octa.net or call 714-560-5588

8. **Updating Vanpool Information.** Keeping your vanpool information up to date is necessary as it may affect your monthly report. Some updates to your vanpool may require review and approval by your vanpool provider and OCTA prior to the new information being active and populating your monthly report. This includes:

- A. **Coordinator and Reporter Contact Information** – To update contact information, employer address, or other profile information, click **My Account** and then the **My Profile** icon. After you make the necessary changes, click **Done**.
- B. **Vanpool Schedule** – Click **My Vanpool** and then the **Schedule** icon. You can also update the days of the week the vanpool operates or any variances your vanpool may have from week to week.
- C. **Pick-up and Drop-off Locations or Adding a New Location** – Click **My Vanpool** and then the **Route** icon when there are changes to existing or new locations where passengers board or are dropped off.
- D. **Passengers Joining or Leaving the vanpool** – To add or delete passengers to your vanpool, click **My Vanpool** and then the **Passenger List** icon. Add the passenger’s name, email, vanpool join date, and pick-up/drop-off locations.
- E. **Update Vanpool Member Information** – Update information or authorize a vanpool member to report by clicking **My Vanpool** on the primary navigation bar and the **Passenger List** icon:



- a. **Coordinator** – OC Vanpool requires that the Coordinator be the individual Primary Reporter responsible for the application and the overall vanpool responsibilities. There is only one Coordinator allowed per vanpool. To change the approved Coordinator, you must contact your vanpool provider as described in [Section 9](#) below.
- b. **Primary Reporter/Additional Reporter(s)** – The Primary Reporter is responsible for completing the monthly report each month. At any time, you can designate an additional Reporter(s) to complete and submit the monthly report. To designate a Reporter(s), go to **My Vanpool** and select **Passenger List**. Scroll to the member name and select **Edit this member**. Scroll below Employer and tap the checkmark button “**This Person will be a Reporter**” and click **Save**. There is no limit to the number of Reporters a vanpool can have.

Note: if there are any changes to your vanpool, complete the changes as indicated above before you start your monthly report because it will impact the data that you submit to OCTA.

9. **Changes to Your Van Provider Use Agreement.** There are a couple of scenarios where your Use Agreement may change with your vanpool provider. When there is a change to your vehicle, mileage cap, or monthly fee, your vanpool provider will make those changes directly to OC Vanpool. These types of changes may include:

- A. **Adjustments to Your Use Agreement with the Vanpool Provider** – Use Agreement adjustments may occur that have no impact to your vehicle. Examples include an adjustment to your monthly use fee or a change to the monthly mileage cap. Should these adjustments occur, your vanpool provider will submit updates to OC Vanpool and it will be reflected in your account.
- B. **Change in Vehicle** – The most important factor with a vehicle change is how the **vehicle’s maximum seating capacity** impacts your vanpool occupancy. ***Important** – Make sure the number of seats in your van is correct before you begin your monthly reporting. Notify OC Vanpool if the van you are in is different than what shows on your account.*

10. Coordinator Change. When your vehicle and route remain the same, but there is a change in the person who signs the agreement with your vanpool provider, follow this process:

- A. Contact the vanpool provider and inform them of the new Coordinator name, contact information and the preferred date for this switch to occur.
- B. The current Coordinator should continue to complete OC Vanpool reports or designate the new Coordinator as a Reporter (see Section 8. E. b.) to ensure there is no interruption of the OC Vanpool subsidy.
- C. Changes in Coordinators **do not** require a new OC Vanpool application if the general route and passengers remain the same.
- D. OC Vanpool will contact the new Coordinator to provide them with instructions on creating an OC Vanpool account or signing into their account so they can begin reporting.

11. Termination. A 30-Day written notice is generally required by your vanpool provider to terminate your vanpool. Please copy vanpool@octa.net on that notice. Remember to complete your report through the last day of your commute in this vanpool to remain eligible for any subsidy from OC Vanpool.

12. Changing Vanpool Providers. If you are switching from one vanpool provider to another, provide a 30-day notice to your existing vanpool provider. Inform OC Vanpool by email to vanpool@octa.net and include your new vanpool provider name and the date that you will begin riding in your new van.