



Metro Vanpool User Guide

The Metropolitan Transportation Authority (MTA) welcomes you to the Metro 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.

MTA 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 Metro Vanpool Program. To remain eligible for this funding, MTA 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 Metro Vanpool Program.

When you qualify for the Metro 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 Metro Vanpool Program are required to report passenger trips daily and vanpool expenses by the last day of each month. Reports are due on third business day of the next month.

To begin, log in to <https://metrovan.ridematch.info/rp2/SignUp/SignIn>. We recommend that you log in using one of the following compatible web-browsers: the latest versions of Microsoft Edge, 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.

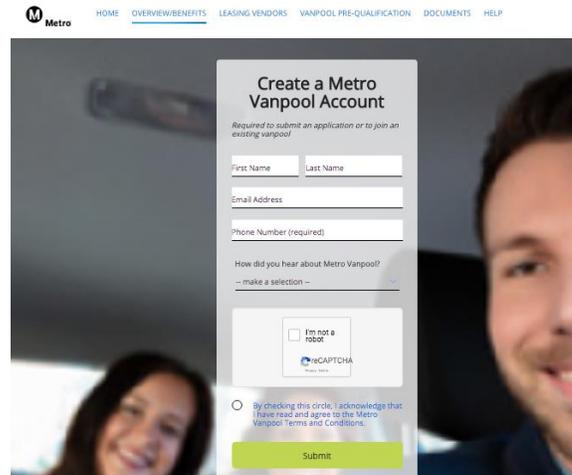
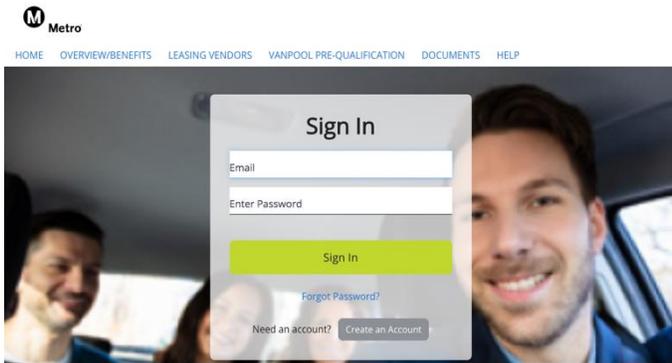
Table of Contents

| | |
|---|----|
| Introduction | 1 |
| Applying for the Metro Vanpool Program | 3 |
| Monthly Reporting Requirements | 6 |
| Signing into the Monthly Reporting Module | 7 |
| Creating a New Monthly Report | 7 |
| Completing a Monthly Report | 8 |
| Reporting Ridership | 8 |
| Expenses | 8 |
| Vehicles | 9 |
| Submit | 9 |
| Expanded Report Menu (Side Bar Menu) | 10 |
| Metro Vanpool Payment of Monthly Subsidy | 11 |
| Updating Vanpool Information | 11 |
| Coordinator and Report Contact Information | 11 |
| Vanpool Schedule | 11 |
| Pick-up and Drop-off Locations or Adding a New Location | 11 |
| Passengers Joining or Leaving | 11 |
| Update Vanpool Member Information | 11 |
| Changes to Your Van Provider Use Agreement | 11 |
| Adjustments to Your Use Agreement with the Vanpool Provider | 12 |
| Change in Vehicle | 12 |
| Coordinator Change | 12 |
| Termination | 12 |
| Changing Vanpool Providers | 12 |

1. How to apply for the Metro Vanpool Program

STEP ONE

Please open the following link: <https://metrovan.ridematch.info/rp2/SignUp/SignIn>



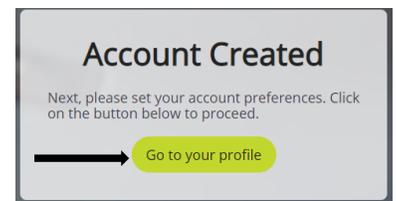
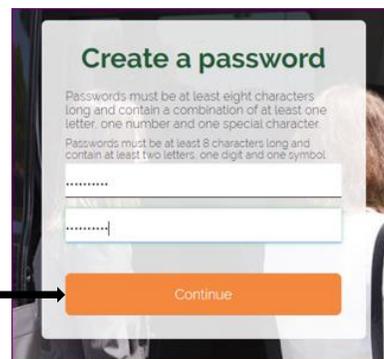
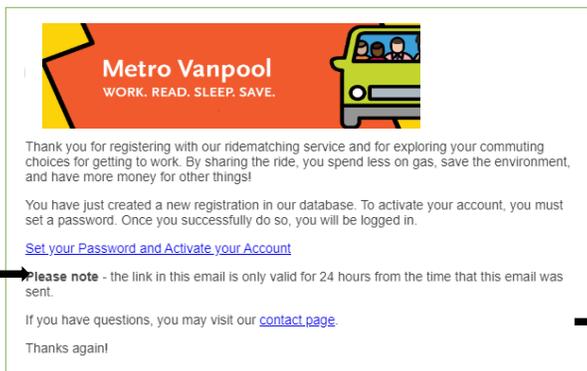
STEP TWO

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 first screenshot shows the 'My Profile' overview page with a 'Return' link and a 'Next' arrow. The second screenshot shows the address entry form with fields for Home Address, Address, City, State, and Zip, and a 'Next' arrow. The third screenshot shows the work location entry form with fields for Work Location, Test Company, City, State, Zip, Work Start Time, and Work End Time, and a 'Done' button.

STEP FIVE

Fill out the information for your vanpool.

The first screenshot shows the 'Vanpool General Information' form with fields for Vanpool Driver Name, Vehicle Leasing Vendor, Date of First Ride, and Vehicle Size. The second screenshot shows the 'Vanpool Schedule' form with fields for Going Trip, Returning Trip, Operating Days, and an Alternate Schedule section.

3 of 6

Vanpool Schedule Information was successfully saved

Route

Origin - Address from where the driver starts the van (home, Park and Ride lot, etc.)

123 Apple Tree, Orange, CA 92840

Work Address (last stop/driver exits)

1234 Test Company, Orange, CA 92840

Additional Pick-up and Drop-off Stops

Add all stops where riders are picked up and all work locations where riders are dropped off on the [route to work only](#). Click and drag below to reorder

[Add a Stop](#)

Add a Stop

Name

Test Passenger

Address

Test Pick-up Point

Pick-up or Drop-off on [Route from Home to Work](#)

Pick-up (Riders get on)

Close [Add](#)

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).

4 of 6

Route saved successfully

Confirm Vanpool Route

Please review the vanpool origin, stops, destination, and route shown below. If everything looks correct then click on the 'Confirm' button. Otherwise click on the 'Return to Route and Stops' button to revise the vanpool locations. You may adjust the stops by dragging them to new locations, and the route between the stops by dragging the route line.

[Go Back to Route and Stops](#) [Confirm and Continue](#)

5 of 6

Vanpool Passenger List

| Name / Email | Status |
|--|------------------|
| Celine Tran celine-tran@outlook.com | Primary Reporter |

[Edit this member](#)

[Add new member to vanpool](#)

[Save and Go Back](#) [Save and Continue](#)

Tip: When adding your passenger, make sure you have their email address. An email with a link will be sent to them. The passenger will be asked to put in their address where they board the van and the address of their work destination. They will be required to sign the participant agreement on-line.

Vanpool Member Information

First Name
Anna

Last Name
Coordinator

Vanpool Join Date
7/15/2020

Role
Primary Driver

Select a Pick-up Stop

Vanpool Origin

Select a Drop-off Stop

Vanpool Destination

Employer
MTA

Save

Save and Add Another

Cancel

Vanpool Passenger List

5 of 6

| Name / Email | Status | |
|--|--|--------|
| Charlie Coordinator celine-tran@outlook.com | Coordinator | |
| Edit this member | | |
| Passenger John thuanhau714@yahoo.com | Participation Agreement Signed | Remove |
| Edit this member | | |
| Passenger Patricia mcconnelltracy73@yahoo.com | Reporter Participation Agreement Not Yet Signed | Remove |
| Edit this member | | |
| Passenger Patrick scollins@octa.net | Participation Agreement Not Yet Signed | Remove |
| Edit this member | | |
| Passenger Pete boylesandy56@gmail.com | Participation Agreement Not Yet Signed | Remove |
| Edit this member | | |

Add new member to vanpool.

Save and Go Back Save and Continue

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. If you have not already done so, you will need to agree to our Participation Agreement and sign it. The signature portion of this form is shown below.

17. Participant Authorization By checking the box below and writing my name in Section 18 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 above terms and conditions.

I Agree

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

Participant Name and Signature

Friday, August 07, 2020

Clear Signature

Print this Agreement

Submit

Revised June 18, 2020 – Previous Versions May Not Be Used

If you need assistance, please email vanpool@metro.net or call 213-922-7003

Once all of your passengers have signed the participant agreement on-line, Metro Vanpool staff will review your application.

Please log into your account periodically to check the status of your application.

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 | Participation Agreement Signed |
| | Participation Agreement Signed |
| | Participation Agreement Signed |
| | Participation Agreement Signed |

2. Monthly Reporting Requirements.

To be considered for the monthly Metro 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://metrovan.ridematch.info> or on the Metro Vanpool mobile application by the third business day of the following month.

- 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://metrovan.ridematch.info 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://metrovan.ridematch.info/rp2/SignUp/SignIn>

The screenshot shows the Metro website's navigation menu with options: OVERVIEW/BENEFITS, LEASING VENDORS, VANPOOL PRE-QUALIFICATION, DOCUMENTS, and HELP. Below the menu are four main sections: 'Benefits of Vanpooling' (with a 'Program Overview' button), 'Find an existing Vanpool' (with a 'Find a Vanpool' button), 'Pre-qualify your Vanpool' (with a 'Vanpool Eligibility' button), and 'Sign In' (with a 'Sign In' button). An arrow points from the 'Sign In' button to a 'Sign In' form. The form includes fields for 'Email' and 'Enter Password', a green 'Sign In' button, a 'Forgot Password?' link, and a 'Need an account? Create an Account' button. A tip box with a lightbulb icon states: '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.** Metro 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.

New Monthly Report
VO1395 - Charlie Coordinator

This page displays your vanpool route and schedule, including Pick-up and Drop-off points, as well as all of the people currently registered in your vanpool group. If anything regarding the route, stops or passenger list is incomplete or incorrect, please [update it immediately](#).

Schedule
Going Trip 5:30 AM - 6:00 AM
Returning Trip 3:30 PM - 4:00 PM
Operating Days: Mon Tue Wed Thu Fri
[Update Schedule](#)

Route
Origin → Destination: 23.36 mi
Destination → Origin: 22.91 mi
[Update Route](#)

- 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 Metro 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) | Travel Time from Work (minutes) |
| <input type="text" value="30"/> | <input type="text" value="30"/> |
| Distance to Work (miles) | Distance from Work (miles) |
| <input type="text" value="23.36"/> | <input type="text" value="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"/> |

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.

a. 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.

Report Menu

Expenses for March 2020

Vanpool: VO1395 - Charlie Coordinator

Add each vanpool expense for the month. Enter '1' for quantity for all expenses except fuel.

Expense has been added

| | | | | |
|-----------------------------------|--------------------------------|-----------------------------------|----------------------|------------------------------------|
| Expense Type | Quantity | Total Cost | Comments | <input type="button" value="Add"/> |
| <input type="text" value="Fuel"/> | <input type="text" value="0"/> | \$ <input type="text" value="0"/> | <input type="text"/> | |

| My Expenses | | | | |
|-----------------------|----------|------------|----------|---------------------------------------|
| Expense Type | Quantity | Total Cost | Comments | |
| Fuel GA - Gasoline | 20.00 | \$75.00 | | <input type="button" value="Delete"/> |
| Cleaning | 1.00 | \$15.00 | | <input type="button" value="Delete"/> |

- b. **Comments** – you may add any comments you believe may be of assistance Metro 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.

Ending Odometer for March 2020

Vanpool: VO1395 - Charlie Coordinator

Click Edit and enter the ending odometer for the month. If the vehicle you used is not in this list, contact us right away.

Vehicle updated

| Vehicle | Start / End Date | Start / End Odometer (Miles) |
|--------------------------------------|-----------------------|------------------------------|
| ENTNTD 70NF75 2020 Acura C2900 | 3/1/2020 3/31/2020 | 121 1520 1399 |

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@metro.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 Metro 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.

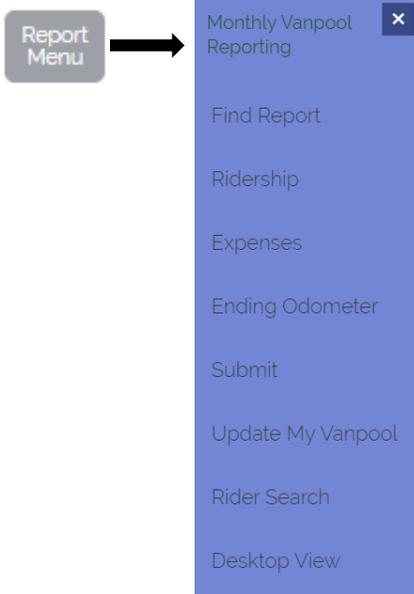
Multiple vehicles were used during the course of this reporting period.

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.

- 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 Metro Vanpool to re-open your report.
 - i. contact MTA at vanpool@metro.net or 213-922-7003.

- ii. After correcting any errors, click **Submit**.
- d. *Congratulations!* You have submitted your Metro Vanpool monthly vanpool report. You will receive an email from Metro Vanpool confirming receipt of the report. The Metro 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**.



- 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.

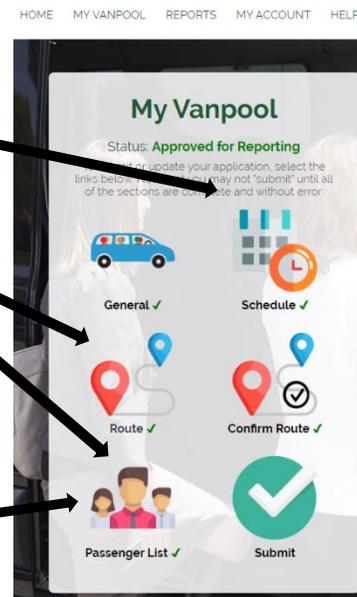
7. **Metro Vanpool Payment of the Monthly Subsidy.** Metro Vanpool staff will notify you by email if you do not qualify for the Metro Vanpool subsidy. The Metro Vanpool subsidy will appear on the invoice you receive from your vanpool provider.

Need Assistance – Please email vanpool@metro.net or call 213-922-7003

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 MTA 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:
- Coordinator** – Metro 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.
 - 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 MTA.

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 Metro Vanpool. These types of changes may include:
- 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 Metro Vanpool and it will be reflected in your account.
 - 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 Metro 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 Metro Vanpool reports or designate the new Coordinator as a Reporter (see [Section 8. E. b.](#)) to ensure there is no interruption of the Metro Vanpool subsidy.
 - C. Changes in Coordinators **do not** require a new Metro Vanpool application if the general route and passengers remain the same.
 - D. Metro Vanpool will contact the new Coordinator to provide them with instructions on creating an Metro 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@metro.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 Metro 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 Metro Vanpool by email to vanpool@metro.net and include your new vanpool provider name and the date that you will begin riding in your new van.