User Guide to SB Loop Monthly Reporting

Welcome to the SB Loop Vanpool Subsidy Program! The following step by step guide will provide you detailed information on keeping your vanpool information up to date as well detailed instructions on how to complete the required monthly reporting on SB Loop's (the Loop) program website ridetheloop.com (System). This Guide is for applicants that have a vanpool lease with *Commute with Enterprise* and have been approved to receive a subsidy from SB Loop. If you have not applied for a Loop subsidy, visit ridetheloop.com or call (833) RIDETHELOOP (833-743-3843).

Important - The monthly Loop subsidy is contingent on following the SB Loop Program Guidelines, the Participation Agreement and submitting an accurate and complete report each month. Reports are due by 5:00 p.m. on the 5th day of each month for the previous months vanpool operation.

We recommend for best access to ridetheloop.com that you log on through one of the following four compatible web-browsers: Windows Internet Explorer Version 8 or higher; and/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 to the most recent operating platform.
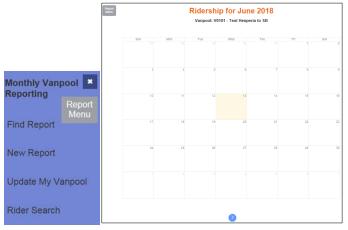
Guide Contents

1. **Reporting Deadlines.** Your vanpool commute statistics and expenses must be inputted into ridetheloop.com for each calendar month period and is due by **5:00 p.m. on the 5th day of each month.** For example, the July monthly report log (which covers July 1st through July 31st) is due by *no later than* August 5th, by 5:00 p.m. If the deadline falls on a day off, on a weekend or holiday, it is still your responsibility to ensure the report is complete and submitted into ridetheloop.com by the 5th of each month. If you are unable to submit your report by the deadline, and you have not identified a

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Reporter for your vanpool who can submit the report by the deadline, contact the Loop immediately. Remember that your monthly Loop subsidy is contingent on following the SB Loop Participation Agreement and submitting an accurate and on time monthly report.
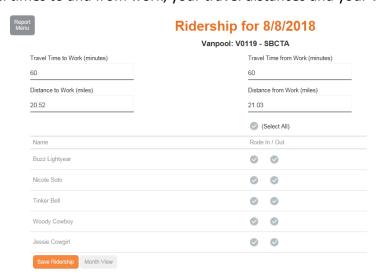
2. **Updating Vanpool Information.** Keeping your vanpool information up-to-date is easy and important, as it populates your monthly report that is required to be submitted each month. Depending on the types of updates you make to your vanpool, review and/or approval by the Loop may be required prior to the new information being active and populating your monthly report. Vanpool information that should be kept up to date includes but is not limited to:

A. **Leaseholder, Reporter, Primary Driver and Driver(s) Contact information** – Each individual upon signing into their account need to click **My Account** on the primary navigation bar and then the **My Profile** icon to update their contact information, employer address or other profile information.

B. **Vanpool Schedule** – Including the times that your vanpool departs the home end at the beginning of the work day (Going to Work Trip) and then the times the vanpool departs work at the end of the work day (Returning Trip). You may also update the days of the week the vanpool operates or any variances your vanpool may have from week to week. Click **My Vanpool** on the primary navigation bar and then the **Schedule** icon.

C. **Pick-up and Drop-off Locations** – Should there be changes or new locations where passengers board your vanpool or are dropped off at the work end. Click **My Vanpool** on the primary navigation bar and then the **Route** icon.

D. **Passengers joining** the vanpool or **passengers leaving** the vanpool – To add or remove passengers to the vanpool roster, click **My Vanpool** on the primary navigation bar and then the **Roster** icon.
   ➢ *Note - Should any of your origin, destination, Pick-up and/or Drop-off locations change, make those updates to your application __first__. Click **My Vanpool** and select **Roster** to edit the passengers that have been impacted by these location changes.*

E. **Vanpool member designations** – Update or change roles of members of your vanpool by clicking **My Vanpool** on the primary navigation bar and the **Roster** icon**:**
   i. **Leaseholder** – The Loop requires that the Leaseholder be the individual responsible for the application and overall vanpool responsibilities, and there is only __one__ Leaseholder allowed per vanpool. Should the vanpool anticipate or require a change to the approved Leaseholder, you must contact Commute with Enterprise as described in __Section 3__ below.
   ii. **Primary Driver/Back-Up Driver(s)** – One member of the vanpool must be designated as the Primary Driver. This can be the Leaseholder or another rider who conducts the majority of the driving and is authorized by the vanpool provider to drive. You may also change/designate as many Back-Up Driver(s) who are also authorized by the vanpool provider as needed.
   iii. **Reporters** – At any time you can change or designate a Reporter(s) who will assist the Leaseholder with monthly reporting. Designating a Reporter(s) is a great option to ensure changes to the vanpool and submitting monthly reports are completed on time. To designate a Reporter(s), select the member's name and towards the bottom of their contact information form, check **This Person will be a Reporter**.
      ➢ *Important – Should you change or designate individuals to serve in any of these roles, an email will be sent to those individuals with instructions on creating an account or signing into __ridetheloop.com__ to review and sign an online Participation Agreement.*

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3. **Changes to Your Vanpool Vehicle Lease**. There are several scenarios where your vanpool vehicle lease may change. In general, should there be a change to your vehicle or lease, the vanpool provider will make those changes directly on ridetheloop.com. These types of changes may include:

   A. **Adjustments to your lease –** Lease adjustments may occur that have no impact to your vehicle. Examples include an adjustment to your monthly lease amount or a change to the maximum miles the lease allows. Should these adjustments occur, the vanpool provider will update the lease information on ridetheloop.com and if applicable, upload a new lease or vehicle checklist.

   B. **Change in vehicle –** A vehicle change may occur, possibly resulting in a new lease. The most important factor with a vehicle change is the vehicle's maximum seating capacity, which impacts your occupancy and is a requirement tied to your monthly reports.

      ➢ **Please note** - ridetheloop.com calculates occupancy based on the vehicle that vanpool provider enters into the system that was used on the last day of the month. *For example -* you have a 10-passenger van during July and working with the vanpool provider, you change vehicles on July 20th to an 8-passenger model. When the occupancy is calculated for July, it will be based on the 8-passenger vehicle. Upon a vehicle change, the vanpool provider will update ridetheloop.com and if applicable, upload a new lease and a vehicle checklist.

   C. **Leaseholder change –** Where your vehicle and route remain the same, but your vanpool has a change in the Leaseholder, the person who signs the vanpool vehicle lease. When this occurs, the old Leaseholder should notify the Loop and the vanpool provider of the change.

      i. The old Leaseholder must notify the vanpool provider, by either emailing Commute with Enterprise at coordinatorswitches@vanpool.com, and provide their *old* Leaseholder's first/last name, their Agreement number, the contact information of the *new* Leaseholder and their preferred date when this switch will take place.

      ii. The Loop will work with the old Leaseholder or assigned Reporter(s) to ensure the monthly reporting is completed prior to the Leaseholder change.

      iii. Changes in Leaseholders <u>do not</u> require a new Loop application as long as the general route and passengers remain the same. The Loop will update the system with the new Leaseholder's information. In addition, the vanpool provider will update ridetheloop.com with a new lease and a vehicle checklist, signed by the new Leaseholder.

      iv. The Loop will contact the new Leaseholder to provide them with instructions on creating a Loop account or signing into their account, providing/updating their profile information (home address, email, phone number, employer and supervisor), sign an online Participation Agreement, and maintaining the vanpool information and monthly reporting.

4. **Data Gathering Requirements.** To continue to receive a monthly Loop subsidy, you are required to submit an accurate and on time monthly report. Your vanpool's report is based on a calendar month period, and must be submitted on ridetheloop.com ***by <u>5:00 p.m. on the 5th day of each month</u> for the previous months vanpool operation*.** The system will send out a friendly reminder email on the 27th of each month to the Leaseholder and Reporter(s) of the approaching due date.

   ➢ **Note -** You are only required to report activity from the day your subsidy began and forward. *For example,* if your subsidy began July 15th, start your reporting on July 15th and no earlier.

   ➢ The Loop encourages you to log your ridership data as often as possible (daily, on the weekends, etc.) to avoid the last minute crunch to collect your ridership data and expenses before the 5th of the month deadline.

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5. **Signing in to the Monthly Reporting Module.** Beginning on the first day you receive your Loop subsidy and for each month that your vanpool is in operation, you will need to sign in to ridetheloop.com to track and log your daily vanpool ridership (vanpool members who rode the van each day), expenses incurred by the vanpool such as fuel, parking costs and tolls, personal or maintenance miles, and at month end, the vanpools ending odometer reading.

   A. When signing in to ridetheloop.com for the **first** time after your subsidy has been approved and until your first monthly report has been submitted, you will automatically be directed to your Monthly Ridership Report, which will display in a monthly calendar view.
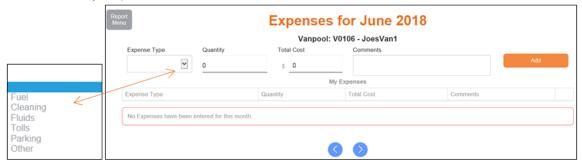

6. **Completing a Monthly Report.** The section will describe the steps for creating, completing and submitting your Loop monthly report.

   A. **Ridership** – From the Monthly Ridership Calendar, the current day will always be highlighted as <mark>pale yellow</mark>. Each day you have already completed will be shaded green. Click the day you need to log your vanpool riders, which will direct you to the Daily Ridership form. The Daily Ridership form is pre-populated with information from your application, including your Vanpool ID/Name, your travel times to and from work, your travel distances and your vanpool riders.

   Important – Begin logging your vanpool data starting on the first day your vanpool received a Loop subsidy. The Loop encourages you to log your daily ridership as often as possible, such as daily, on the weekends, etc.

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i. **Travel Time to/from Work (minutes) and Distance *to/from* Work (miles) -** The two columns (see above) contain the one-way commute times and miles on your commute **_to/from_ _Work_** for the selected day.
   1. Should either of your commute segments have a travel delay (minutes) or a detour (miles); update those fields to accurately reflect your commute statistics for that segment for the day selected.
   2. Should your travel time/miles be the same each day, leave as is.
ii. **Riders** - Check the boxes for each rider that travelled in your vanpool, *to and from work*, for the selected day of travel.
   1. If one or more of your riders did not travel in your vanpool on a given day, leave blank.
   2. If one or more of your riders travelled only one way (*Example* – a rider rode in to work in the vanpool and found an alternate means of travel to go home), check **only** the "Rode In" box.
   3. If all riders rode both to and from work, check the **Select All** button.
   4. If most riders rode that day, click the **Select All** button and *uncheck* those that did not ride.
   5. When finished, click the **Save Ridership** button. You must click **Save Ridership**, *or your entries will be lost!*
   6. Upon successful ridership data entry, you will be returned to the Monthly Ridership Calendar, and the date box into which you entered ridership data will be shaded in **green**. Above the calendar, you will receive the message: "Daily Ridership was successfully saved for {*date*}."
      ➢ *Tip: To view your Monthly Ridership Calendar at any time, click the* **_Month View_** *button towards the bottom of the Daily Ridership form.*
   7. 👍 You have now completed the Daily Ridership entries for the day selected. Continue this process for each day your vanpool operated during the reporting month.
   8. If you are reporting at month end, and you have finished logging all your daily ridership statistics, you may click the blue forward arrow at the bottom of the calendar to move to the next section of the reporting process.

B. **Expenses** – This section is where you must track and enter the out of pocket expenses the vanpool incurred during the month, such as fuel, cleaning, fluids, tolls, parking, etc. Enter all expenses as noted below, even if your employer paid for some or all of those expenses. **_Do not_** enter your lease amount in Expenses. Your lease amount is maintained in the System by Commute with Enterprise and you are not required to input this expense as part of your monthly reporting responsibilities. For each **Expense** your vanpool incurred during the month, enter the following in each of the required fields:
   i. Select the **Expense Type** – click the drop down menu and select fuel, cleaning, fluids (oil, transmission fluid, power steering fluid, etc.), tolls, parking or other expenses (such as windshield wipers).

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ii. Identify the **Quantity** of the expense type. If "Fuel" is selected then the "Quantity" column changes to "Gallons/Units". For all other expense types, identify at least a "1" in this field so that you may proceed.

iii. Enter the **Total Cost** for that expense type, in dollars and cents.

iv. **Comments –** you may add any comments you believe may be of assistance to the Loop regarding the expense type.

v. Click **Add.** Upon successfully adding an expense a green banner will appear, notifying you that the expense has been added to your report.

vi. 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).

   ➤ *Tip - You may enter a monthly total for each of your **Expenses** listed, or, you may enter individual expense line items. For example, if during the month you purchased a total of 250 gallons of fuel for a total of $800, then this can be added in as one entry. Or, you can enter each monthly fuel purchase individually, as they occur.*

vii. Once you have entered all of your **Expenses** for the current reporting month, continue by clicking the blue forward arrow.

C. **Personal/Maintenance Miles** – The Loop requires reporting of any travel during a month period that is <u>NOT</u> for commuting purposes, which are categorized as Personal/Maintenance Miles. These Personal/Maintenance miles should be entered by day and by miles. If during a reporting month period your vanpool did not travel any non-commute miles, then you may skip this section.

   ➤ *Personal Miles – For example, using the vehicle to run an errand during lunch or, on the weekend. The Loop suggests that you refer to your vanpool provider's lease agreement to confirm the total miles that your lease is based on, as well as the amount of personal miles you are allowed each month. The Loop requires that personal miles not exceed 20% of the average monthly commute miles to and from work to maintain eligibility for the subsidy.*

   ➤ *<u>Maintenance ("Maint") Miles</u> – Such as travel to/from a repair station to bring the vehicle in for scheduled services, or driving to meet vanpool provider staff to exchange a vehicle.*

D. To add/document Personal or Maintenance Miles, click **Add a Trip** and enter the following information:

   i. **Vehicle** – The vehicle year, make, model and Unit ID number will auto-populate. Verify this vehicle is correct for the trip being reported. If you were assigned a new or loaner vehicle during the month, select the drop down arrow to choose a different vehicle. If the new or loaner vehicle used during the month period is not showing, *please contact the vanpool provider immediately and ask them to update the System*.

   ii. **Trip Purpose** – Select either Maintenance or Personal Trip Use.

   iii. **Start Date** – Enter the date the trip started.

   iv. **End Date** – Enter the date the trip ended.

   v. **Miles** – Enter the miles traveled for the entire Maintenance or Personal trip.

   vi. Click **Save**. The entry will now appear in the table.

   vii. To edit or change the entry, click **Edit Trip**, or to delete the trip entirely, click **Remove Trip**.

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viii. Once you have added your personal/maintenance trips, click the blue forward arrow to proceed to the next reporting section.

E. **Vehicles –** In this section you will confirm the vanpool vehicle that was in your possession **and** enter your vehicle's ending odometer reading. Both should be confirmed and reflect the mileage from the last day of the reporting month period, which would be at the time the vehicle was parked at the home end. The system will display your vanpool vehicle's year, make, model and vehicle Unit ID number.

➢ *Please note – 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 reporting month. Should this NOT be the vanpool vehicle currently assigned to you, or if you were assigned a new vehicle on the last day of the reporting month, please contact the vanpool provider immediately and ask them to update the System.*

➢ *If you had a temporary loaner vehicle for a few days while your assigned vehicle was in for service or repair, enter the dates you had the loaner vehicle: "My vehicle was being serviced and I was given a loaner vehicle from (date) to (date)."*

To complete this section, follow these steps:

i. Select "**Edit**" for the appropriate vehicle and enter the following:
1. **Start Date** – Confirm the pre-populated Start Date aligns with the date you began receiving a Loop subsidy for your first monthly report, or for loaner and new vehicles, the first day the vehicle was operated.
   For example, if your vanpool was subsidized for the entire month of July 2020, enter 7/1/20 and 7/31/20. If your subsidy started on July 15th, for the month of July you will enter 7/15/20 as your start date and 7/31/20 as your end date.
2. **End Date** – This information will be pre-populated; confirm the dates align with the date you operated your vehicle(s).
3. **Starting Odometer** – If this is the first month that you are reporting, the S*tarting Odometer* will be automatically pre-populated. If each month you create a new monthly report after you've submitted the prior month's report, the *Starting Odometer* will automatically pre-populate with the prior month's *Ending Odometer*. If you create a new monthly report *before* the prior month's monthly report has been submitted, the *Starting Odometer* will need to be entered, which should be consistent with the *Ending Odometer* from the prior month. If you are unsure, it is recommended that you verify the Starting Odometer at the time of completing this reporting section.
4. **Ending Odometer** – Enter 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.
5. The system provides this statement based on the daily mileage of the vanpool route and the number of days the user entered: "Total vehicle miles (excluding non-commute usage) should be at least [**XXXX**] based upon the number of days riders were reported on the van. If your route changed on one or more days, please click the Distance/Time button above to update the miles and time for your commute on those days." This gives the user a chance to check their entries were correct or if needs to be revised, or if the vanpool route/miles need to be updated.
6. Click **Save** and a green "Vehicle Updated" banner will appear above the table.
7. Click the blue forward arrow to proceed to the final reporting section.

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F. **Submit –** If all Ridership, Expenses, and Vehicle information has been logged, 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.

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

    ii. Select **one** of the two buttons below to identify how many vehicles were used during the reporting period:

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

    iii. Read the statement "*I Confirm that my vanpool report is correct"* and check the box upon confirmation.

    ➢ *Important – <u>Before</u> you click submit, use the blue back arrow to **r**eview your entries carefully and/or edit if necessary. Once submitted, your report will be locked for review by the Loop and you will not be able to make further changes.*

    iv. After confirmation/review, click **Submit**.

        1. If you receive error messages and the System is unable to submit your report, please correct the errors noted. If you are having trouble correcting the errors, contact the Loop at ridetheloop@gosbcta.com or 833-RIDETHELOOP (833-743-3843)

        2. After correcting any issues, click **Submit**.

    v. ***Congratulations!*** You have submitted your Loop monthly vanpool reporting log. You will receive an email from SB Loop that your report was transmitted successfully. The Loop will review your report and if necessary, may contact you or your Reporter(s) with questions.

7. **Creating a New Monthly Report.** The Loop recommends you not create a new monthly report until the prior month's report has been submitted. If a new monthly report is required, please ensure you verify your Starting Odometer as described in <u>Section 6</u>.

A. On the primary navigation bar at the top of the webpage, click **New Report**.

B. Each time a new report is created, you are required to verify the accuracy of the vanpool **Schedule, Route and Roster.** If any of this information has changed, update these sections by clicking the blue **Update** link beneath each section. Visit <u>Section 1 – Updating Vanpool Information</u> above for further information.

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

C. **Read** the statement and upon confirmation, check the "*I confirm*" box.

D. **Select** the Reporting Month and Year of the report you are creating.

E. Click **Create**.

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8. **Side Bar Menu**. In the reporting section of ridetheloop.com, there is a Report Menu that can be used at any time when completing your monthly report. 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, fluids, tolls, parking, etc.
   D. **Personal/Maintenance Miles** – Report personal use and/or maintenance miles for the vanpool.
   E. **Vehicles** – Confirm the vanpool vehicle and enter your vehicle's ending odometer reading.
   F. **Submit** – Confirm and submit your monthly report.
   G. **Update My Vanpool** – Update your Route, Schedule and/or Roster.
   H. **Rider Search** – If you lost any vanpool riders during the month or are interested in filling empty seats, use this feature to search for interested vanpool riders near your vanpool's home and work end.

9. **SB Loop Payment of the Monthly Subsidy.** Upon the Loop's review and approval of your monthly report, the Loop will provide the subsidy to the vanpool provider directly. Depending on your invoice cycle , your first month's subsidy may not be reflected on your invoice until the following month. Should you have questions as to when your subsidy will be reflected on your invoice, contact your vanpool provider. Since your subsidy is determined based on your lease amount (50% of the lease amount not to exceed $400 per month), should your lease amount change , then your subsidy may change as well. Any changes to your lease will be reported into ridetheloop.com directly by the vanpool provider. Should there be any discrepancies on your bill and the SB Loop-provided subsidy, contact the vanpool provider first to resolve. If the issue is not resolved, please contact SB Loop for assistance.

Need Assistance? The Loop has many tools to assist you – go to ridetheloop.com to view the SB Loop Program Guidelines, Frequently Asked Questions (FAQ), and other program materials. SB Loop staff is also available, email ridetheloop@gosbcta.com or call 833-RIDETHELOOP (833-743-3843).

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