

vanpool
by Spokane Transit

**Vanpool
Reporting
Guide**

July 2020



1212 W Sharp Avenue, Spokane, WA 99201
STAvanpool@spokanetransit.com
SpokaneTransit.com/Vanpool
509-326-POOL (7665)

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Thank You Bookkeepers

Your work is greatly appreciated! As the bookkeeper you are responsible for submitting the monthly ridership report and payments to STA on or before the 8th of the month. This includes the online reporting for vehicle mileage and ridership and the payment report which is completed in MS-Excel.

You will be able to log into online reporting anytime during the month to enter data. If your online report is not yet submitted and the deadline is approaching, you may receive a reminder email from the Vanpool office.

Groups that fail to turn in their reports by the 8th of month may be assessed a late fee, and the group's fuel card may be deactivated. Please reference the STA Vanpool manual for further information.

On-line Reporting for mileage & Ridership

Access to reporting is through the website www.commutefindernw.com.

The website is also a ride matching service providing bookkeepers an easy way to search for new Vanpool members.

Payments and Payment Record

Each month bookkeepers will prepare a payment record and inform the riders of their payment amount due. This should be done prior to the 1st of the month so the riders will be able to submit their payments in a timely manner.

The payment forms (and all other forms) are located on our website under Bookkeeper Forms: <https://www.spokanetransit.com/vanpool>

Riders can now make payments by check or online at with their individual accounts at <https://www.commutefindernw.com>

Check payments can be sent in with a copy of the payment record using a provided SASE envelope. If you do not have one, please call 509 326-POOL for more. You may also send payments to:

Spokane Transit Rideshare
1230 W Boone Ave
Spokane, WA 99201

Terminology

Vanpool Group	A designated group of persons joined together to commute to and from worksite(s) in a single van. A group is assigned a vanpool group number (i.e. V602) that does not change.
Roster	All the persons who are members of the group comprise the vanpool roster. Only the vanpool staff can make changes to the roster.
Vanpool Vehicle	This is the vehicle assigned to a vanpool group. Vehicles can change for a group due to changes in roster, van availability or temporary assignments. Vans are assigned a number that starts with the letter 'R'.
Loaner Vehicle	A temporarily assigned vehicle to a group who will use it while the regularly assigned vehicle is being serviced.
Vanpool Route	The mapped route with all pick up and drop off stops of a vanpool group.
Bookkeeper	The person responsible for monthly reporting for a vanpool group.
Revenue trip	Vanpool term for any trip on the van where riders are going to or from their work sites.
Incidental Trips	These trips are defined as incidental to a regular commute trip. Incidental trips occur during the workday when the van is with the driver. Groups can use up to 50 miles a month for incidental use. Approved drivers must sign an agreement and the bookkeeper logs each trip as a non-revenue trip (see next entry).
Non-Revenue Trip	A trip made for any purpose other than commuting. Use for fueling or washing your van that amount to 3 or more additional miles.
Inbound trip	Vanpool term for a trip going to the work site.
Outbound trip	Vanpool term for a trip coming from the work site.
Responsive Site	CommuteFinderNW takes advantage of responsive web design. This means you can access this website with your mobile device without loss of functionality. In some cases, accessing the site on a mobile device may arrange the page differently and/or place menu items in an expandable button.

Important Tips

- Saving your Work** Entries are not saved when you type them. They are saved when you “submit” or “save” the page or click the “next” button to move to the next page. If you make a change, then navigate to another function without saving, the change will be lost.
- Signing out** You are logged in the reporting site until you click on “Sign Out” or close ALL tabs in the web browser. If you close one tab while another is running, you are still logged in.
- Back Function** Use the back function to navigate to previous pages.

Logging In

Reporting is done via a password protected web page. To access bookkeeper reporting, the Vanpool office will need to activate it for you. When you log in at www.commutefindernw.com you will automatically be taken to your bookkeeping view. If you would like to make a fare payment or edit your profile, select “Commuter” from the “Switch Roles” tab on the menu bar.

Monthly Reporting

Once you’ve logged in, you will be redirected to a screen prompting you to review the route, schedule, and roster information on file for you. If there are any changes that need to be made, please contact the Vanpool Office at stavanpool@spokanetransit.com.

Please note that a rider agreement should always be submitted to the Vanpool Office when a rider joins the van prior to their first ride. When a rider leaves the van, they must submit a withdrawal form before the end of the month and make any outstanding payments in order to be removed from the roster.

Please make sure the route and the stops are correct and assigned correctly to the riders listed.

Once you’ve reviewed all your vanpool information, at the bottom of the page select “I confirm that all of the information above is correct about this route,” then click “Submit”

From there, you will be directed to fill out ridership for the *current date*. If you would like to submit ridership information daily, you can do so from here. If you are submitting ridership information at the end of the month, please navigate to the “Find Monthly Report” screen by selecting “Find Report” and searching for the month you would like to edit.

Commute Finder NW
Spokane Transit

SWITCH ROLES HOME MY ACCOUNT FIND REPORT NEW REPORT HELP DOCUMENTS

Monthly Reporting

Find a Monthly Report

Vanpool Code V542 ▾

Start Month January ▾ Start Year 2020 ▾

End Month December ▾ End Year 2020 ▾

Search

When you select the report you would like to fill out, you will see a blank calendar for the month for which you’re submitting ridership information. From this screen, you can submit daily ridership information, or navigate to different sections of the report by selecting the gray “Monthly Reporting” icon on the top left of the screen.

SWITCH ROLES HOME MY ACCOUNT FIND REPORT NEW REPORT HELP DOCUMENTS

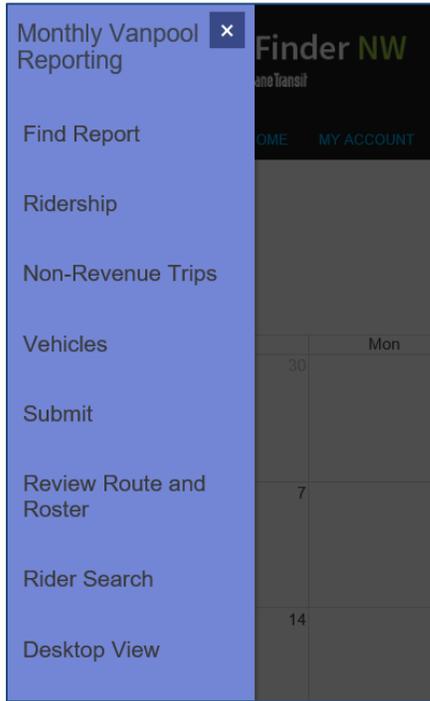
Monthly Reporting

Ridership for July 2019

Vanpool: V542 - North/5 Mile to Liberty

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13

Monthly Reporting Menu



Find Report: Use if you have already started a report for a month or create a new report.

Ridership: Navigate to the monthly ridership entry screen.

Non-Revenue Trips: Navigate to enter any non-revenue trips. This may include maintenance, fueling or incidental trips.

Vehicles: Navigate to vehicle entry and monthly mileages.

Submit: Final review and submission screen.

Review Route and Roster: Please review your vanpool route and roster frequently and notify the vanpool office of any changes.

Rider Search: Use to find riders to fill an empty seat in your van.

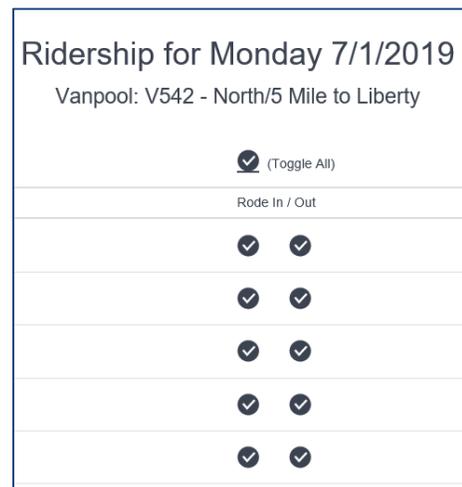
Desktop View: Access to legacy ridership entry process.

Filling Out Your Monthly Report

Ridership

Once you've selected the month you would like to edit, you will first see the "Ridership" screen, which will display a blank calendar. Select a day to edit ridership information, and you will be directed to a screen prompting you to fill check off the rides each person on the roster took for that single day.

There are two check marks by each person's name: one for a ride in to work, and one for a ride home. You have the option to select or deselect all the checks by clicking "Toggle All."



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If there's someone who took trips on your van whose name does not appear on your roster, please select the "Add Rider" option at the bottom of the list of riders.

Once you've entered all the trips, select "Save and Continue" at the bottom of the page to save the trips you've entered and move on to the next day of ridership.

After you've completed ridership for each day of the month, you can either click the blue arrow at the bottom of the calendar to move forward to "Non-Revenue Trips" or select the gray "Monthly Reporting" icon and select "Non-Revenue Trips" from the menu bar.

***NOTE: if you would like to use the previous version of the site to avoid entering ridership by day, you can select "Desktop View" from the Monthly Reporting menu.**

Non-revenue Trips

Trips taken by a driver for non-commuting purposes are called non-revenue trips. These trips may include traveling to fuel the van, deliver the van to the maintenance shop, and travel to wash the van. Non-revenue trips are also recorded for Incidental Use trips (see full Vanpool manual for details) and should not exceed 50 miles per month.

- Record non-revenue trips as Fuel/Wash when the van is driven to fuel or wash a round trip distance of 5 or more miles.
- Record non-revenue trips as Maintenance when the van is driven by the vanpool driver to the Spokane Transit maintenance shop.
- Record non-revenue trips as Personal Miles when the van is driven by the vanpool driver during non-commuting times for errands and appointments as outlined in the Spokane Transit Vanpool Manual.

Common errors in non-revenue trips include:

- Non-revenue trips start and end on the same day. Please record that as such.
- An error will occur if the maintenance miles omitted in the "Vehicles" section are recorded as a non-revenue trip. In the example below, the bookkeeper has recorded that the van was taken in for maintenance at 52,103 miles and returned for commuting purposes at 52,115 miles.

Vanpool Reporting Guide

Monthly Reporting

Vehicles for July 2019

Vanpool: V542 - North/5 Mile to Liberty

Vehicle updated
✕

Search for a Vehicle

	Vehicle	Start / End Date	Start / End Odometer (Miles)	
Edit	STA R232 2014 Chevrolet 3500	7/1/2019 7/9/2019	51765 52103 338	Delete
Edit	STA R210 2014 Dodge GRANDCAR	7/9/2019 7/10/2019	61291 61326 35	Delete
Edit	STA R232 2014 Chevrolet 2500	7/10/2019 7/31/2019	52115 52453 238	Delete

This omits the 12 miles traveled for the purpose of maintenance and does NOT need to be recorded separately in the non-revenue trips section.

To correct an error of this nature, remove the non-revenue trip entirely. If the van is brought into the shop and a spare vehicle is NOT used by the group while maintenance is done, then the trip will be recorded as a non-revenue trip for maintenance.

In the example below, the assigned van R232 traveled 5 miles for fueling. This would be one non-revenue trip. Add more trips as necessary.

Monthly Reporting

Non-Revenue Trips for July 2019

Vanpool: V542 - North/5 Mile to Liberty

Add Trip

	Vehicle	Trip Purpose	Start / End Date	Start / End Odometer	Miles	
Edit Trip	STA R232 2014 Chevrolet 3500	Fuel/Wash	7/9/2019 7/9/2019	52103 52108	5	Remove Trip

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Vehicle Usage

The vehicle odometer at the end of last month will be copied forward to this month. If this is the only vehicle driven for the entire month, with no trips to the shop, simply select "Edit" and enter the ending odometer to complete the vehicle usage section.

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	Vehicle	Start / End Date	Start / End Odometer (Miles)	
<input type="button" value="Edit"/>	STA R232 2014 Chevrolet 3500	7/1/2019 7/31/2019	51765 52564 799	<input type="button" value="Delete"/>

Add additional van(s) by entering the vehicle number(s) and clicking “Search” and “Select”. You may search and select the same vehicle more than once. This will allow you to enter odometer readings for same van for different date ranges.

Loaner van

If you were given a spare van to use while your assigned vehicle was in the maintenance shop, please record the date range and miles of the loaner van by selecting “Search for a Vehicle” and entering the ID number of the spare van used.

A box will come up that will allow you to enter the date range during which you used the spare van, as well as the starting and ending odometers for that date range.

Enter the end odometer of your assigned van BEFORE driving to shop and AFTER returning from shop. This is true for both regular and loaner vans. The miles between the shop and your location should not be recorded as commuter miles.

You will need to record two date ranges and odometers of the regular assigned van. In the example below, entries for the assigned are recorded for the dates of the 1st to the

Start Date: 7/9/2019

End Date: 7/9/2019

Start Odometer: 61291

End Odometer: 61326

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9th and another range from the 10th – 31st because the spare van was used on the 9th and 10th.

Monthly Reporting

Vehicles for July 2019

Vanpool: V542 - North/5 Mile to Liberty

Vehicle updated

Search for a Vehicle

	Vehicle	Start / End Date	Start / End Odometer (Miles)	
Edit	STA R232 2014 Chevrolet 3500	7/1/2019 7/9/2019	51765 52103 338	Delete
Edit	STA R210 2014 Dodge GRANDCAR	7/9/2019 7/10/2019	61291 61326 35	Delete
Edit	STA R232 2014 Chevrolet 3500	7/10/2019 7/31/2019	52103 52453 350	Delete

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Submitting the Report

The final step of the report is to submit all the information you've entered for the month. Select "Submit" from the monthly reporting menu bar and you will go to a screen that has space for comments and a few final checks before you select "Submit." Please do not use the comment box to notify STA of maintenance concerns or roster changes; instead, please contact stavanpool@spokanetransit.com or 326-7665 to report this items.

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Monthly Reporting

Submit July 2019

Vanpool: V542 - North/5 Mile to Liberty

Comments

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 vanpool roster is correct, and that no additions or deletions need to be made. All information in this report is complete and correct.

Once you hit submit, all your entries will be checked. If no errors are found, the month will be closed and you will not be able to make further changes. You will receive an email confirming receipt of the data. You will not be able to edit the report once it is submitted, but if you need to make a change, contact the Vanpool Office to have the report reopened.

Searching for More Riders

Our web site features a “Rider Search” that will check the database for other people who commute at the same time your vanpool operates and have origins and destinations similar to your vanpool’s route. If your vanpool route has one or more empty seats, you can search the database for candidate riders. To do so, select “Rider Search” from the monthly reporting menu.

Monthly Reporting

Rider Search

V542 - North/5 Mile to Liberty

This feature allows you to search for new riders for your vanpool route.

Each person displayed in this list either lives near a pickup point or passes by a pickup point, and works near a dropoff point, and their schedules are compatible with your vanpool route.

You may adjust the search by choosing how far to search around pickup points and dropoff points.

Search around pickup points (mi) Search around dropoff points (mi)

Include commuters on the wait list whether or not they match the search criteria

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You may adjust the search by how far to look at the start and end of your vanpool route, and how much time flexibility to consider.

The results will be displayed in text, and on an accompanying map. You may also export the list to a spreadsheet.

Monthly Payment Report Instructions

STA must receive a copy of the payment record each month either by mail or email. This is the only record STA will have of expected payment amounts and method of payment by each rider.

In the top right section of the payment report, record the group number and month/year of the payment period.

Record each participant's name and employer. Enter the individual fare amount assigned to each rider. The amounts in each column will be entered as explained below;

Column A : List the flat rate assigned based on the starting/ending counties as follows:

- \$60 a month if your commute is within Spokane County
- \$80 a month if your commute includes Kootenai or Stevens County
- \$100 a month if your commute is in any other county

Column B: Commuters who joined the van prior to July 2020 who paid a rate lower than those listed above will continue to pay the lower rate.

Column C: List the dollar amount of any subsidies provided by employers

Column D: List any other credits a rider might have (recruiter incentive, new rider incentive, previous overpayment, etc).

Mail a copy of the payment record with any checks using an STA pre-paid envelope. Vanpool, 1230 W Boone Ave, Spokane, WA 99201 - **DO NOT SEND CASH** -

Email the report if all payments are made online: stavanpool@spokanetransit.com

Recording Online Payments

Riders can make an online payment in their individual commuter account at www.commutefindernw.com. All riders have a profile set up for them when they join a van, and they do not need to register themselves if they haven't already. Please direct

Vanpool Reporting Guide

riders to contact the Vanpool Office with any questions about logging into the site or making a payment to the vanpool group.

Bookkeepers can access their commuter accounts by selecting “Commuter” from the “Switch Roles” tab on the menu bar.

How to Make Online Payments

Below is the step-by-step process of making online payments

1. Log in at www.commutefindernw.com. The vanpool office creates a login for you when you sign up for the van, so you do NOT need to register yourself. Contact the Vanpool Office if you need assistance logging in.
2. Upon logging in, you will automatically land on the “Things To Do” tab, where you can select “Vanpool Fare.”
3. Enter the amount you would like to pay, then select “Make Secure Payment” to be redirected to the secure payment screen.
4. Enter your card information and submit the payment. Credit card information is NOT stored in the users account.
5. Check your email for confirmation that the transaction was processed.

Other Forms and Important information for bookkeepers

All forms are located on our website: <https://www.spokanetransit.com/vanpool>

Forms

- Expense reimbursement form
- Rider Transfer/withdrawal
- Rider Agreement
- Driver Agreements/information on how to become a driver
- Vanpool Bus Pass registration
- Event/Accident Report

All forms can be submitted by any of the following:

- *Email:* stavanpool@spokanetransit.com
- *Mail:* Vanpool, 1230 W Boone Ave, Spokane, WA 99201 or use our pre-paid envelope.
- *Fax:* 509-232-6784

We can be reached at 509-325-7665 (POOL) or email: stavanpool@spokanetransit.com

Other Information

1. All new riders must fill out a rider agreement and submit to STA – The vanpool staff will add to your roster. Bookkeepers cannot make changes to rosters.
2. All riders leaving or transferring vans should fill out a Rider Transfer/withdrawal – The vanpool staff will delete or move the rider to another group roster. Bookkeepers cannot make changes to rosters.
3. Riders may obtain a Vanpool bus pass by visiting the STA Plaza Customer Service.
4. Please feel free to inquire on account balances.
5. Please let us know of roster, route and stop changes. These can only be made by the vanpool staff, please keep us current.
6. Van are serviced every 4,000 miles, and a “next due” sticker is in the windshield. Please contact the Vanpool Office to schedule an appointment before the van reaches that mileage.
7. All accidents or incidents need to be reported immediately and an Event Report will need to be filled out.

Example of Van Log

Use this form to log daily trips and odometers. When the month is finished, transfer this information into your on-line report.



RIDERSHIP and MILEAGE

DO NOT SEND THIS RIDERSHIP LOG TO STA. ENTER ALL INFORMATION INTO ONLINE REPORTING SYSTEM.

MONTHLY VEHICLE MILEAGE REPORT - record each date range for all vans for the month.

VAN	Start Day	End Day	Start Odometer	End Odometer

NON REVENUE TRIPS - record the date and mileages of each non-commuting trip. For Purpose, use MAIN for Maintenance, FUEL for fuel or wash, PERS for Personal miles

VAN	Date	Purpose	Start Odometer	End Odometer

RIDERSHIP KEY CODES: **R** = Round Trip All other codes are alphabetic. **i** Inbound **O** Outbound **D** Day off/Did not ride **X** not on roster

DAY OF MONTH

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					
1. Vanpool Passengers' Names																																				
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