Performance Data Reporting

Revised Reporting Process

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DRPT
VIRGINIA DEPARTMENT OF RAIL AND PUBLIC TRANSPORTATION

Agenda

1. Why is DRPT Updating the Reporting Process?
2. Data reporting upgrades
   - Upgrades to Transit Reporting
   - Upgrades to Commuter Assistance Reporting
3. Overview of New Process
4. Performance Data Reporting Walk-Through
5. Questions

Why is DRPT Updating the Reporting Process?

- DRPT has needed an update to our Performance Data reporting module for a long time to:
  - Align with industry standards for performance data reporting
  - Accommodate the updated schedules for required reporting
  - Include a more advanced mechanism to communicate with reporters
- On December 1, DRPT will launch a new grants management software – WebGrants
- WebGrants does not currently have a performance data reporting module that maintains the flexibility needed

Data Reporting Upgrades – Transit Modes

- DRPT transit reporting modes have been revised to align with NTD reporting
- Agencies can use monthly data reported for both DRPT and NTD

Old DRPT Transit Modes	New DRPT Transit Modes	NTD Reporting Modes
Bus (Fixed, Commuter, DR)	**Bus - Fixed Route**	Bus - Fixed Route (MB)
-	**Bus - Commuter**	Bus – Commuter (CB)
Bus Rapid Transit	**Bus - Bus Rapid Transit**	Bus - Bus Rapid Transit (RB)
Paratransit/ADA	**Demand Response - ADA***	Demand Response – ADA + Public* (DR)
-	**Demand Response - Public***	-*
Light Rail	**Light Rail**	Light Rail (LR)
Heavy Rail	**Heavy Rail**	Heavy Rail (HR)
Commuter Rail	**Commuter Rail**	Commuter Rail (CR)
Ferryboat	**Ferryboat**	Ferryboat (FB)

**Demand Response - ADA and Demand Response - Public are reported together in NTD*

Data Reporting Upgrades – Transit Modes

- All mode definitions are included in the performance data reporting tool

Transit Mode	Definition
Bus Rapid Transit	Fixed-route bus systems that operate at least 50% of the service on fixed guideway
Commuter Bus	Local fixed-route bus transportation primarily connecting outlying areas with a central city
Bus – Fixed Route/ Local	A transit mode comprised of rubber-tired passenger vehicles operating on fixed routes and schedules over roadways
Commuter Rail	An electric or diesel propelled railway for urban passenger train service consisting of local travel which operates between a central city and outlying areas
Demand Response – ADA/ Paratransit	Public transportation with door-to-door service for ADA qualified riders
Demand Response – Public	Public transportation with door-to-door arranged in advance available to the public (no eligibility requirements), including microtransit services
Ferryboat	A transit mode comprised of vessels carrying passengers over a body of water
Heavy Rail	Transit mode that is an electric railway with the capacity for a heavy volume of traffic
Light Rail	A transit mode that typically is an electric railway with a light volume traffic capacity compared to heavy rail

Data Reporting Upgrades – Commuter Assistance

- Commuter Assistance Service Types

Service	Definition
Ridematching	Online and mobile app ridematching service open to the public for the purpose of finding carpool, vanpool, and transit matches for commuting or other travel purposes
Vanpool	Vanpool service operators or NTD vanpool reporting programs
Employer Services	Direct interaction with decision makers and employees at employer offices for the purpose of establishing transit and/or vanpool benefits and onsite table events to promote carpooling, vanpooling, and transit

Data Reporting Upgrades – Commuter Assistance

- Performance Measures for Ridematching and Vanpool Services

Ridematching

Performance Measure	Definition
Matches Attempted	The number of ridematching requests for carpool, vanpool or transit submitted by the public through a DRPT approved online or mobile app ridematching system

NOTE: *Agencies using two ridematching systems will report matches attempted separately for each system*

Vanpools (VP)

Performance Measure	Definition
New Vanpools	New vanpools formed with mostly new vanpoolers
Total Vanpools	Total number of vanpools in operation
VP Ridership	Number of actual vanpool passengers, including the non-paid driver, that board a vanpool. Passengers are counted each time they board a vanpool no matter if that vehicle is traveling to or from the office destination
VP Revenue Miles	The miles a vanpool is in revenue service from the first pick-up point to the final drop-off point
VP Passenger Miles	The cumulative sum of the distances ridden by each passenger

Data Reporting Upgrades – Commuter Assistance

- Performance Measures for Employer Services

Employer Services

Performance Measure	Definition
Sales Calls	The number of completed calls where a sales conversation took place with an employer. Does not include voicemails left, or attempted calls where no one was reached
Sale Meetings	The number of in-person and virtual meetings with decision makers with an employer
Table Events	The number of onsite events conducted with a table containing information to promote carpooling, vanpooling, and transit
New Transit Benefits (direct)	The number of employers that started a new transit benefit for employees as a direct monthly benefit either in the employees' paycheck or through a transit pass benefit program
New Transit Benefits (pre-tax)	The number of employers that started a new transit benefit program for employees as a pre-tax payroll deduction
New Vanpool Benefits (direct)	The number of employers that started a new vanpool benefit for employees as a direct monthly benefit either in the employees' paycheck or through a vanpool provider
New Vanpool Benefits (pre-tax)	The number of employers that started a new vanpool benefit program for employees as a pre-tax payroll deduction

Data Reporting Upgrades – Commuter Assistance

Employer Services (continued)

Performance Measure	Definition
Total Transit Benefits (direct)	The total number of employers that have a transit benefit for employees as a direct monthly benefit either in the employees' paycheck or through a transit pass benefit program
Total Transit Benefits (pre-tax)	The total number of employers that have a transit benefit program for employees as a pre-tax payroll deduction
Total Vanpool Benefits (direct)	The total number of employers that have a vanpool benefit for employees as a direct monthly benefit either in the employees' paycheck or through a vanpool provider
Total Vanpool Benefits (pre-tax)	The total number of employers that have a vanpool benefit program for employees as a pre-tax payroll deduction
Total Telework/Hybrid Schedules	The total number of employers that have implemented a hybrid work schedule or teleworking for employees

Data Verification – Commuter Assistance

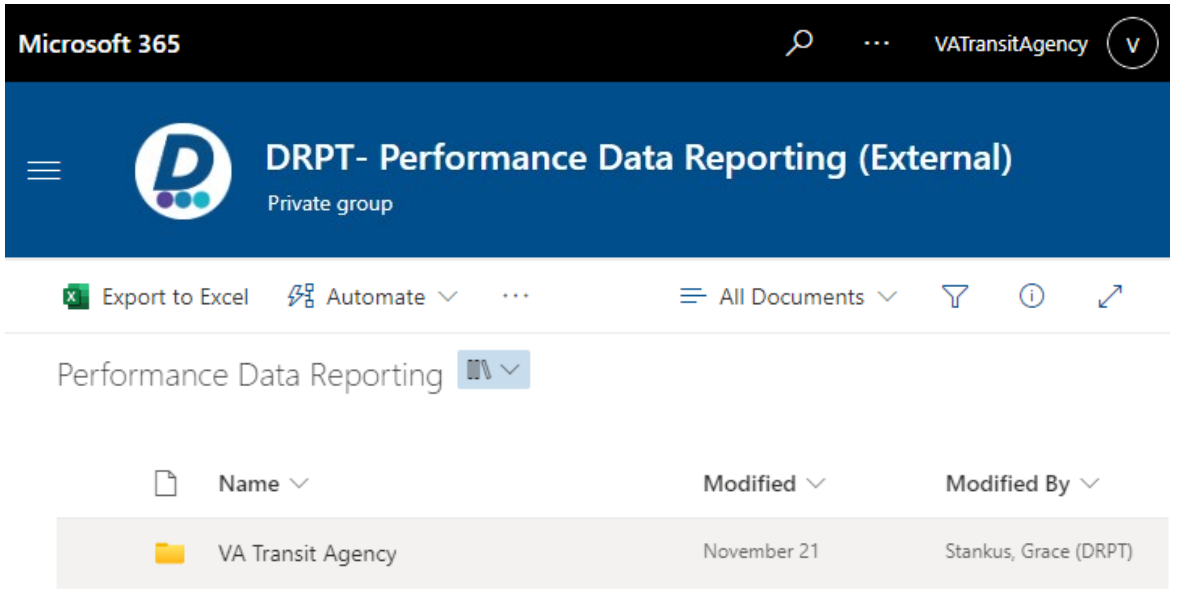
- Performance Measures Data Verification
  - System reports provide a defendable and verified data source
  - Cuts down on human data entry errors
  - Submit monthly reports through your folder on the SharePoint site

Performance Measure	Report Source
Matches Attempted	Monthly report produced directly from the ridematching system
All Employer Services Measures	Monthly report(s) produced directly from a customer relations management system
All Vanpool Measures	NTD report and database/tracking system report

Overview of New Data Reporting Process

- Previous Data Entry Process: OLGA Performance Reporting Module

- New Data Entry Process: Microsoft Excel via Microsoft SharePoint
  - Microsoft SharePoint allows DRPT to share files that external users can access and update through a web browser
  - All files and information are in one place accessible to everyone with permission



Overview of New Data Reporting Process

Step 1: Data reporters and other designated staff will be provided access to a Microsoft SharePoint site hosted by DRPT and a folder associated specifically with your agency

- **All staff that are given access will receive an email with a link to the SharePoint site, then will be asked to follow a two-step process:**
  1. You will be prompted to enter your email address
  2. You will the then be sent a verification code to your email address from Microsoft that you will enter into a verification screen
     - Note: If you have Microsoft Authenticator installed on a cellphone and associated with your Microsoft account, you may be prompted to use that to verify instead of email
  3. After entering the verification code sent through email, you may be prompted to "verify your identity" with an authentication code sent to the phone number associated with your email address

Overview of New Data Reporting Process

Step 2: Each SharePoint site will contain at least one Microsoft Excel file that can be accessed and edited on a rolling basis

- **File 1:** Monthly reporting – available year-round (Transit & CAP)
  - The spreadsheet has been pre-populated with each mode your agency operates
- **File 2:** Annual reporting – available starting in November/December for agencies that report annual PMT to DRPT (Only Transit full reporters)
- **When you click on the file included in the SharePoint site, it will automatically open Microsoft Excel online in a new tab**
  - The file or the SharePoint Site can be easily bookmarked

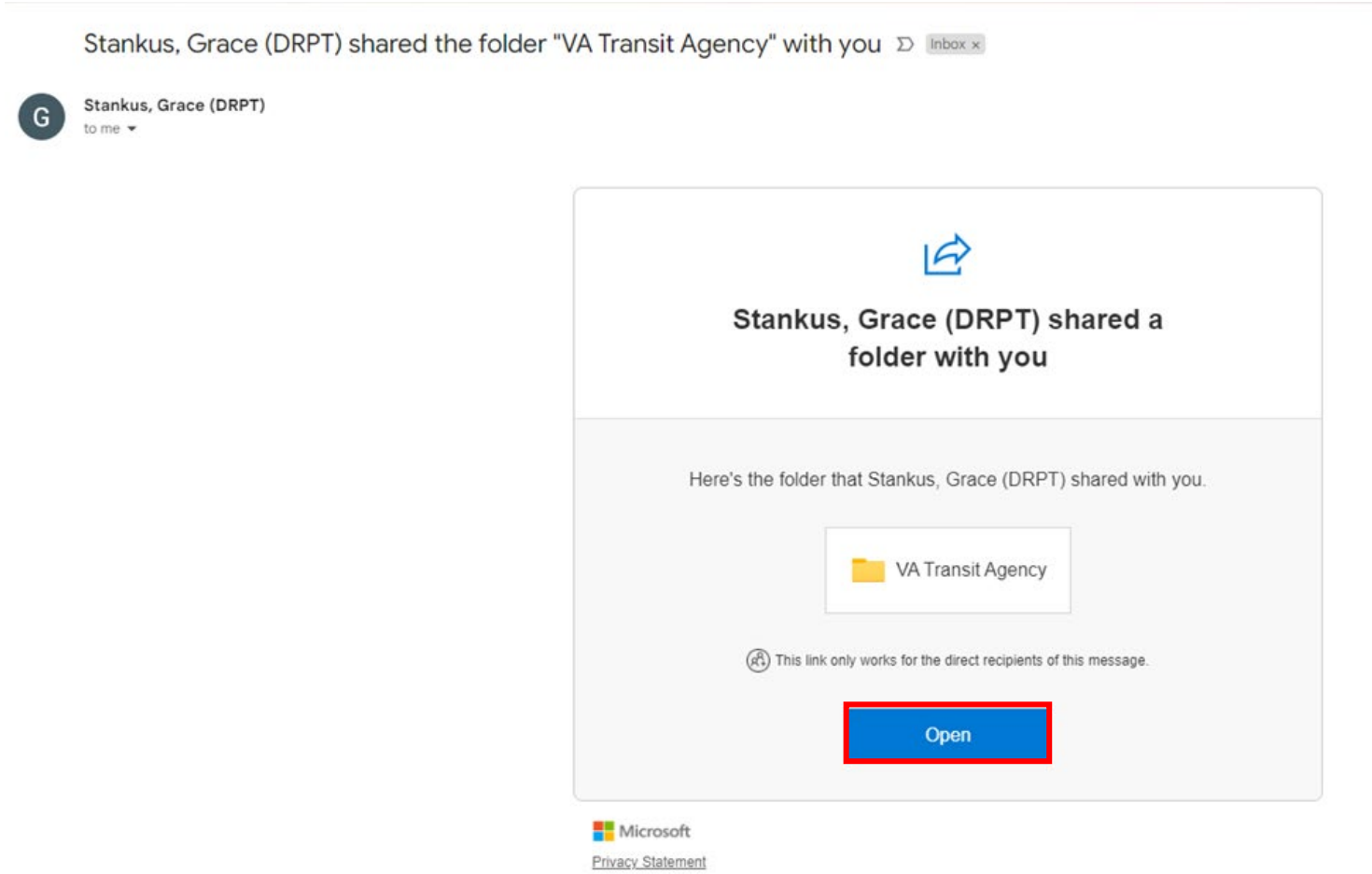
NOTE: All performance data should be edited online. Please do not download the file.

Overview of New Data Reporting Process

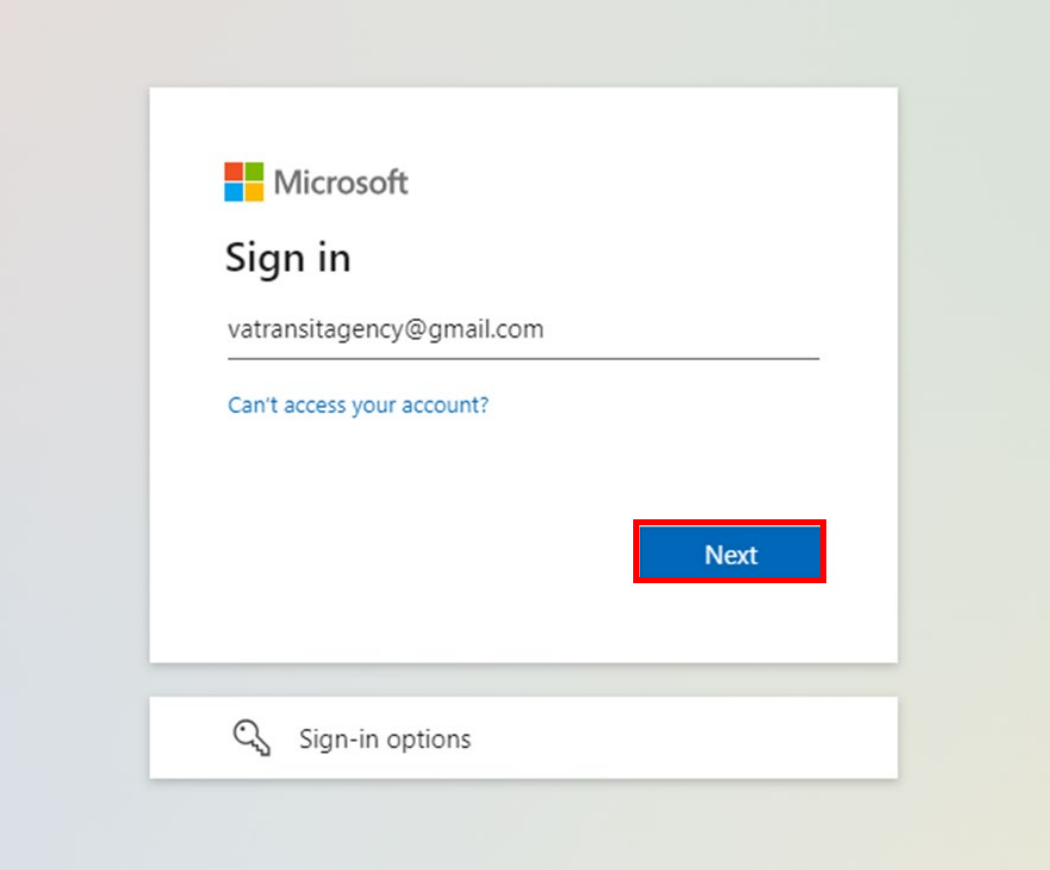
Step 3: Data reporters will need to access their spreadsheet each month to report the next month of performance data and update any previously reported data

- Data will update automatically if files are accessed through Excel online
- Monthly reporting will continue to be due on the last business day of the month
  - Example: November data is due December 29th
  - **Note:** October 2023 data reporting will be due on December 15th
- Annual reporting will be due once a year by December 15th (PMT for full reporters)
- If organizations need to update data reported in a previous fiscal year, please reach out to DRPT staff (grace.stankus@drpt.virginia.gov) and we will advise you on how to do so

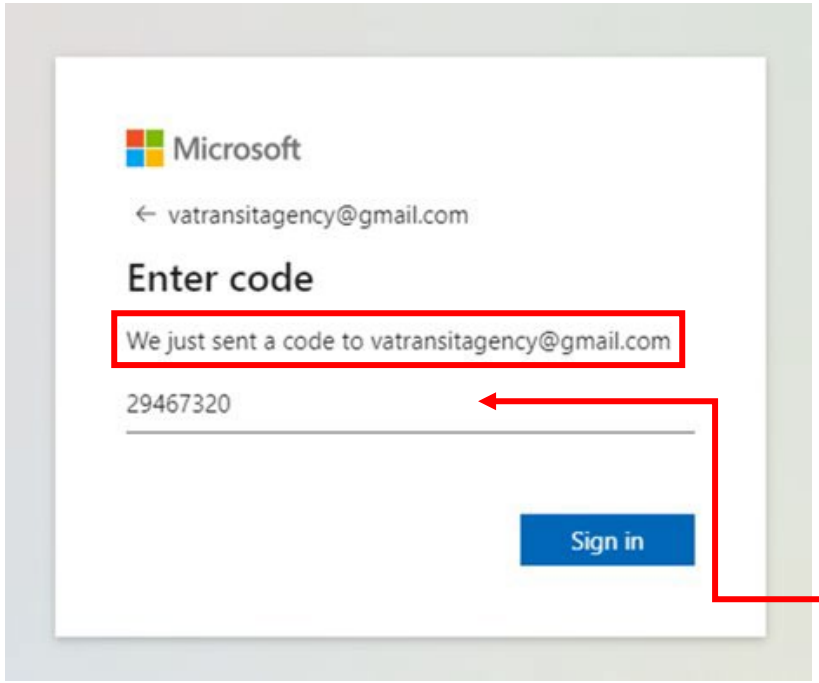
Step 1: DRPT Grants Access to Agency Folder

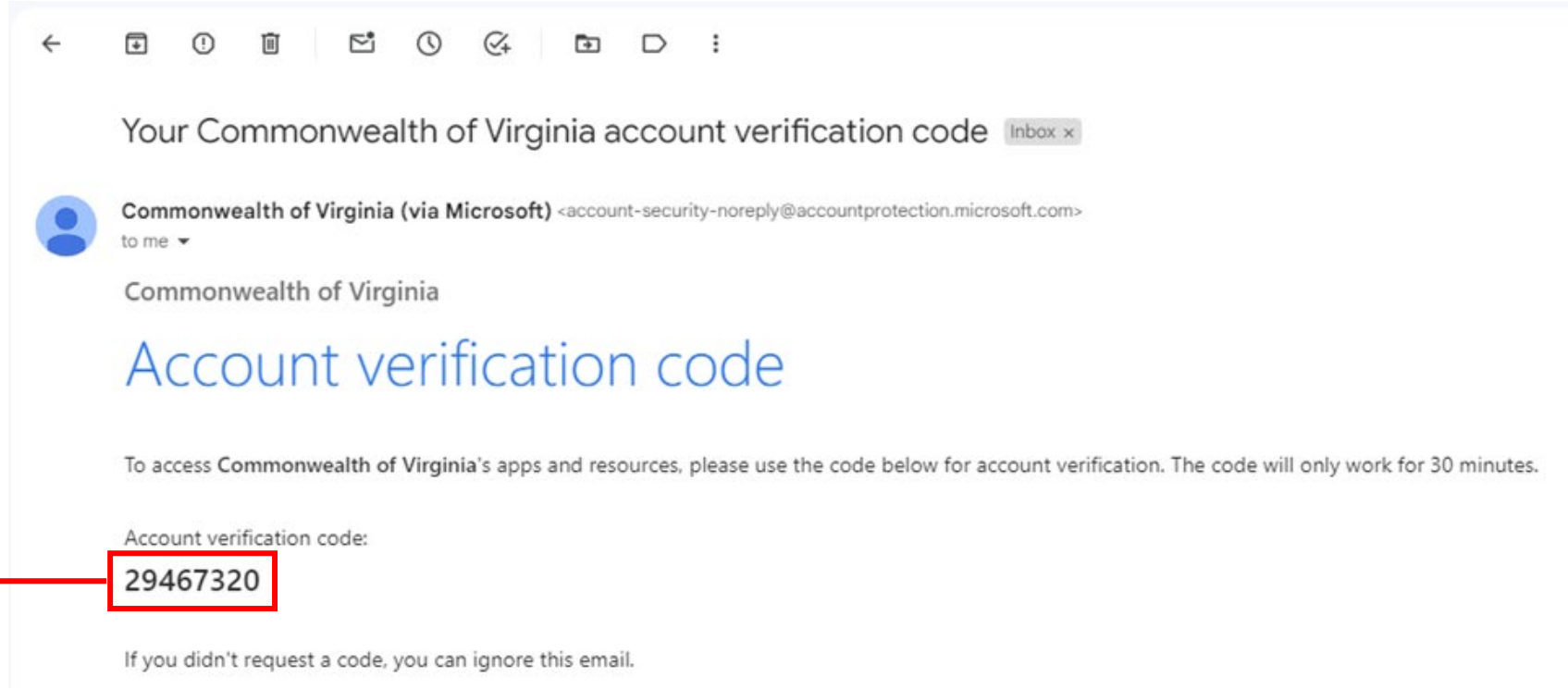


Step 2: Sign-in to Microsoft

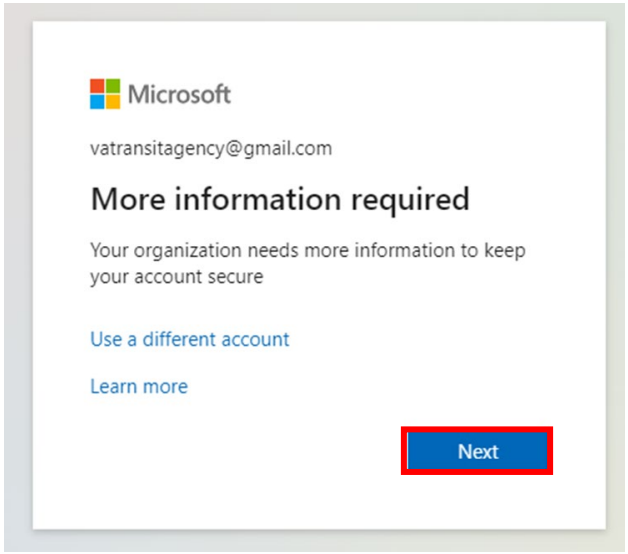


Step 3: Verify Your Account

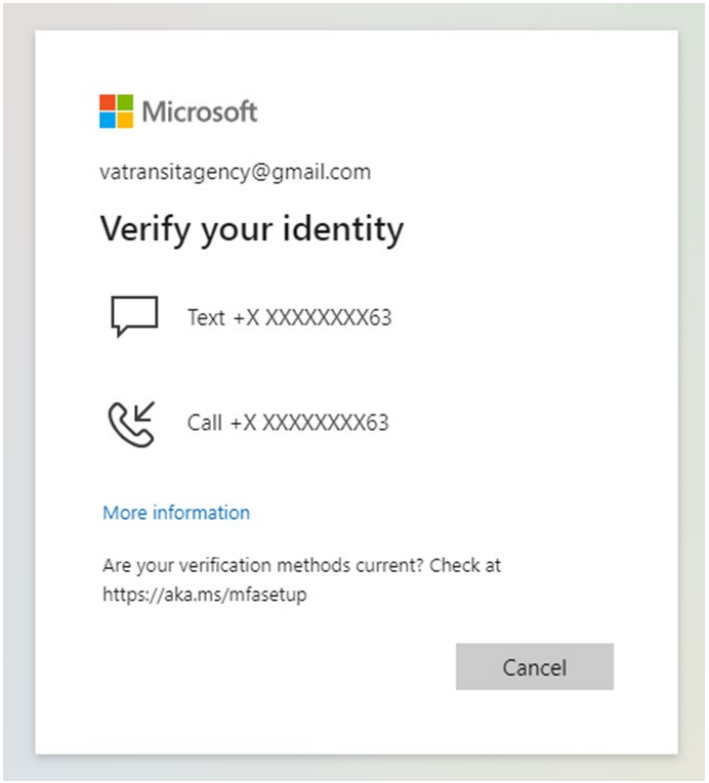




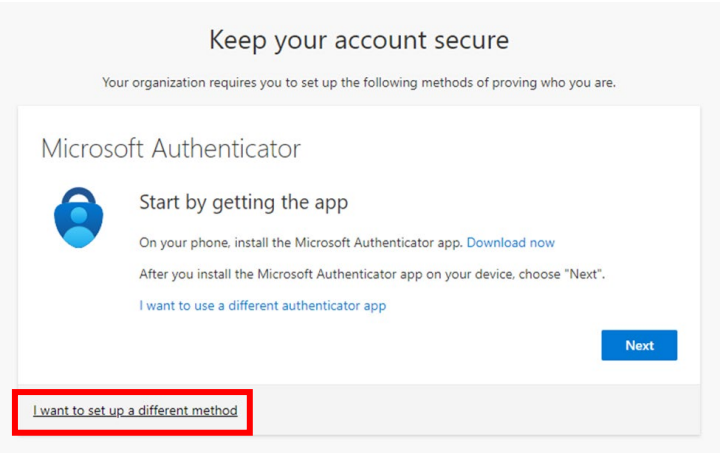
Step 4: Dual Authentication

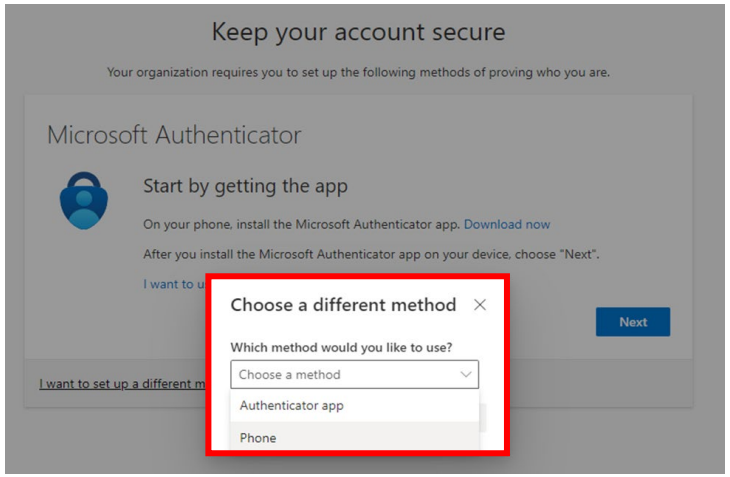


Option 1

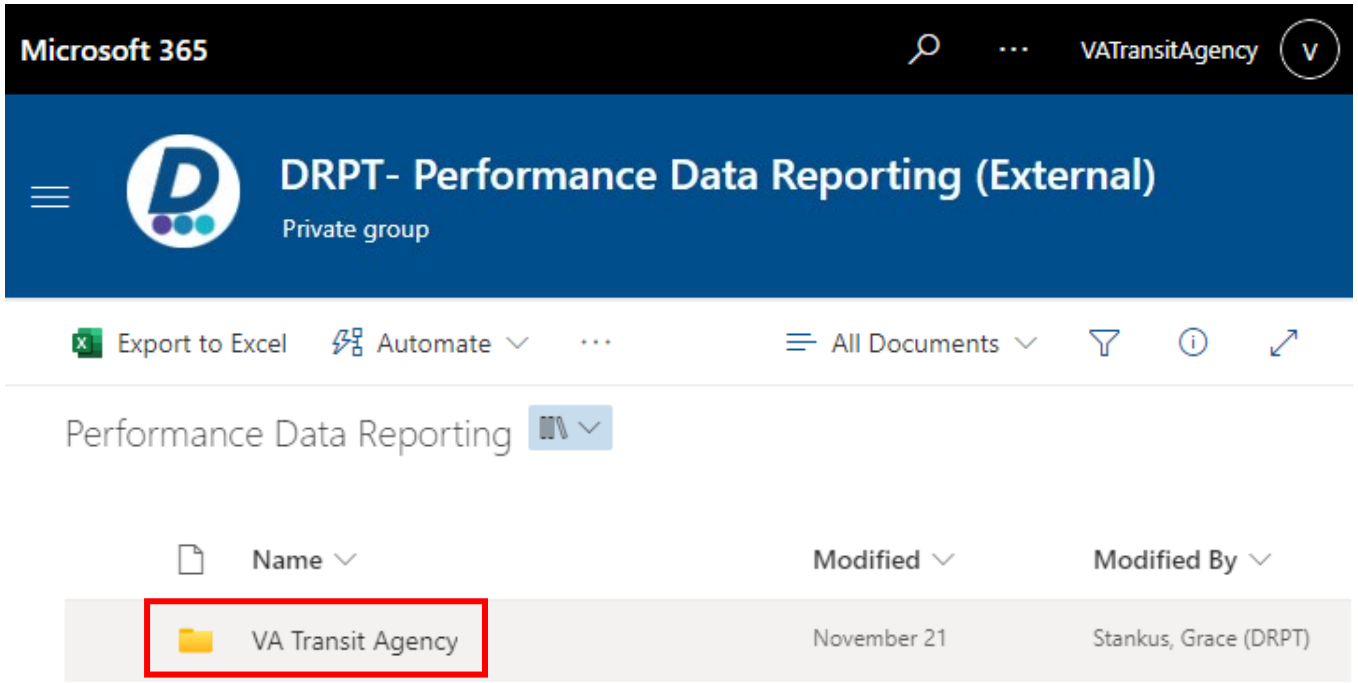


Option 2





Step 5: Access Granted!



Contact Information

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Commuter Assistance Questions
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