



# GUIDELINES and POLICIES

for Administering and Providing Service for Pennsylvania's

## **Senior Shared-Ride Transportation Program** and **Persons with Disabilities Transportation Program**

PENNDOT BUREAU OF PUBLIC TRANSPORTATION  
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Questions?

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# Overview

## **DOCUMENT PURPOSE AND SCOPE**

This document details Pennsylvania Department of Transportation (PennDOT) policies and guidelines for the Senior Shared-Ride Transportation Program and the Persons with Disabilities (PwD) Transportation Program. This document establishes requirements for operating, reporting, compliance, and reimbursement for both programs.

## **PROGRAM DESCRIPTIONS**

PennDOT's Senior Shared-Ride Transportation Program and PwD Transportation Program are eligibility-based funding programs, with services available statewide (by Law, PwD is not available in Philadelphia County). Each shared-ride service provider establishes its own service area, times, and fares.

### **SENIOR SHARED-RIDE TRANSPORTATION PROGRAM**

The Senior Shared-Ride Transportation Program is demand-response transportation service for persons 65 years of age and older. Passengers, an approved third-party sponsor, or combination of a passenger and third-party sponsor pay 15% of the fare and PennDOT reimburses the provider up to 85% of the fare using Pennsylvania Lottery funds. To be eligible, a person 65 years of age or older must:

1. Submit an application with the public shared-ride service provider;
2. Produce an eligible proof-of-age document; and
3. Reserve a shared-ride trip in advance, at least the prior business day of the trip.

### **PERSONS WITH DISABILITIES TRANSPORTATION PROGRAM**

The PwD Transportation Program is demand-response transportation service for persons with disabilities and is intended to provide mobility for eligible persons, who require transportation to or from locations where no other transportation options exist. State law requires the PwD Program to only pay for trips outside of the [Americans with Disabilities Act \(ADA\) service area](#) and for trips that cannot be paid for by another funding source or program. Eligible passengers pay 15% of the public shared-ride fare, or 100% of the complementary paratransit (ADA) fare, whichever is greater. Unlike the Senior Shared-Ride Transportation Program, the PwD Transportation Program does not allow third-party fare sponsors; the discounted fare must be paid by the passenger. PennDOT reimburses the provider up to 85% of the fare, using funds from the Public Transportation Trust Fund. To be eligible, a person must:

1. Be 18 through 64 years of age;
2. Submit an application with the public shared-ride service provider;
3. Produce an eligible proof-of-disability document (the shared-ride transportation provider determines the person's eligibility for the PwD Transportation Program through an Eligibility/Registration application that records the person's Certification of Disability or other proof-of-disability documentation); and
4. Reserve a shared-ride trip in advance, at least the prior business day of the trip.

The PwD Transportation Program is intended to provide mobility for eligible persons, who require transportation to or from locations where no other transportation options exist; thus, it is the "payer of last resort." PwD Transportation Program funds must be used in addition to, not in lieu of, social service and public transportation resources. Providers are required to have administrative procedures and recordkeeping systems to document maintenance-of-effort by other state and federal programs.

There are more restrictions on passenger and trip eligibility for the PwD Transportation Program than there are for the Senior Shared-Ride Transportation Program. See the [Eligibility](#) section for more details.

### **MINIMUM CRITERIA FOR GRANTEE PARTICIPATION**

PennDOT contracts with one shared-ride provider in a geographic area to provide service under the Senior Shared-Ride Transportation Program and the Persons with Disabilities Transportation Program. To apply for the program, a shared-ride transportation provider must be:

1. A transportation company;
2. A local transportation organization; or
3. A municipality or municipal organization.

Per Pennsylvania County Code, counties have the exclusive right to provide public transportation, unless service is provided by a Borough or City, which also have authority to provide public transportation. A private provider cannot provide transportation service on its own unless it has authority or a contract from a county or authorized municipality, or authority from the Pennsylvania Public Utilities Commission (PUC).

Counties or their designees are required to submit information about its community transportation service, providers, fares, and other policies to PennDOT for review and approval on an annual basis or when any changes are proposed. Each county has authority over how shared-ride service is provided in its service area, contingent upon

approval from PennDOT. With PennDOT's approval, counties can designate another entity as the shared-ride service provider and grantee for the area.

Element	Senior Shared-Ride Transportation Program	PwD Transportation Program	See Section
<b>Program Availability</b>	Available in all 67 Pennsylvania counties	Available in all counties except Philadelphia	<a href="#">Program Descriptions</a>
<b>Age</b>	65 and older	18-64	<a href="#">Client (Passenger) Eligibility</a>
<b>Trip Reservation</b>	In advance: The prior business day or earlier	In advance: The prior business day or earlier	<a href="#">Program Descriptions</a>
<b>Trip Purpose Eligibility</b>	<p><u>Ineligible</u> trip purpose:</p> <ul style="list-style-type: none"> <li>Nursing Homes (non-emergency eligible transportation services for medical assistance residents in nursing home is included in the home's per diem rate)</li> </ul>	<p><u>Ineligible</u> trip purposes:</p> <ul style="list-style-type: none"> <li>Medical (if trip can be provided under MATP)</li> <li>Non-competitive employment (e.g. Sheltered Workshops)</li> <li>Adult Training Facilities</li> <li>Day programming</li> <li>Psychiatric rehabilitation and Clubhouses</li> <li>Primary and secondary school bus service</li> </ul>	<a href="#">Trip Purpose Eligibility</a>
<b>Eligibility Documentation</b>	Acceptable proof-of-age documentation	Acceptable proof-of-disability documentation	<a href="#">Client (Passenger) Eligibility</a>
<b>Reimbursement</b>	Up to 85% of the shared-ride fare, subject to reimbursement limits	Up to 85% of the shared-ride fare, subject to reimbursement limits	<a href="#">Reimbursement Limits</a>
<b>Co-payment</b>	15% of the shared-ride fare	15% of the shared-ride fare, or the ADA complementary fare, whichever is greater	<a href="#">Fares</a>
<b>Sponsorship</b>	PennDOT-approved third-party sponsors are permitted to pay all or part of the co-payment	None	<a href="#">Fare Payment by Third-Party Sponsors</a>



# Definitions

## **ADA Complementary Paratransit Service**

As required by federal law, fixed route transportation systems must make comparable transportation service available to persons with disabilities who are functionally unable to use the fixed route service. Comparable transportation service is defined as being within a corridor three-quarters of a mile on either side of a fixed route, during the same hours fixed route service is available, and at a fare that is no more than twice the fixed route fare.

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## **Adult Training Facility**

A building or portion of a building in which services are provided to four or more individuals who are 59 years of age or younger and who do not have a dementia-related disease as a primary diagnosis, for part of a 24-hour day, excluding care provided by relatives. Services include the provision of functional activities, assistance in meeting personal needs, and assistance in performing basic daily activities.

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## **Area Agency on Aging**

A local agency designated by the Pennsylvania Department of Aging to administer delivery of a comprehensive and coordinated plan of social and other services and activities for senior citizens.

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## **Children and Youth Services**

County program that supports children and youth by providing professional social services that support children and their families including transportation. County children and youth agencies fund transportation services to programmatic activities that are covered in the child's program plan for children in substitute care. County children and youth agencies are responsible for funding transportation services for children in placement (e.g., foster care, residential care). County children and youth agencies are not responsible for providing transportation services for children who are served in their own homes.

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### **Charter Service**

The exclusive use of a bus or van for a negotiated price to a special event or excursion selected and paid for by a third party. The third party determines the origin and destination, and it is not part of the transit provider's regular service and is offered for a limited period of time.

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### **Demand-Response**

Transportation services operating based on demand (rather than on a fixed route or timetable) and are available only by advance reservation by the passenger.

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### **Designated Stops**

Pre-established waiting, boarding, and alighting areas for passengers who have reserved a trip in advance with a shared-ride transportation service provider.

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### **Escort**

A passenger who rides at a special reduced escort fare to accompany a passenger who is unable to travel without assistance from another person other than the driver, from origin to destination. No portion of any escort fare for escorts under age 65 is reimbursable through the Senior Shared-Ride Transportation Program or the PwD Transportation Program, regardless of trip purpose.

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### **Find My Ride Apply**

Find My Ride (FMR) Apply allows passengers to apply for shared-ride services with their local transportation provider online. Passengers can submit an application and eligibility documentation through FMR Apply rather than in-person, over the phone, or via other means.

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**Fixed Route Service with Deviation**

Regular, scheduled fixed route service that departs from its scheduled route upon advance request to provide demand-responsive transportation service at a higher fare than that charged on the scheduled route.

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**Grantee**

A provider, either directly or indirectly, of shared-ride transportation services that has entered into a shared-ride program grant agreement with PennDOT.

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**Group Home**

A community home that provides residential care for individuals with an intellectual disability. Transportation to and from group homes is not eligible for the PwD Transportation Program.

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**Health Care Facility**

A medical facility, either for-profit or not-for-profit, including facilities operated by a governmental entity.

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**Local Transportation Organization**

Any of the following:

1. A political subdivision or a public transportation, port authority, municipal authority, or redevelopment authority, organized under the laws of the Commonwealth of Pennsylvania or pursuant to an interstate compact or otherwise empowered to render, contract for the rendering, or assist in the rendering of transportation service in a limited area in the Commonwealth, even if it also renders or assists in rendering transportation service in adjacent states.
2. A nonprofit association that directly or indirectly provides public transportation service.
3. A nonprofit association of public transportation providers operating within the Commonwealth of Pennsylvania.

### **Maintenance of Effort**

Existing human service transportation funding resources are the priority payer for PwD trips. Existing human service transportation programs will not shift the transportation burden to the PwD program. PennDOT is only to be billed for those trips that are not eligible for reimbursement through any human service funding resource, including, but not limited to: the Medical Assistance Transportation Program (MATP), the Mental Health/Intellectual & Developmental Disabilities Program (MH/IDD), the Human Services Development Fund (HSDF), the Office of Developmental Programs (ODP), and other Medical Assistance/Medicaid waiver programs.

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### **Medical Assistance Transportation Program (MATP)**

Federally required Non-Emergency Medical Transportation (NEMT) administered by the Department of Human Services for eligible Medical Assistance (MA) recipients. MATP provides transportation to medical appointments for Medical Assistance recipients who do not have transportation available to them. MATP provider in the individual's county of residence will provide the type of transportation that is least costly while still appropriately meeting the individual's needs.

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### **Non-profit social service organization**

An organization that meets the following criteria:

1. Advances a charitable purpose;
  2. Operates entirely free from private profit;
  3. Donates or renders gratuitously a substantial portion of its services;
  4. Benefits a substantial and indefinite class of persons who are legitimate subjects of charity (not to include clubs organized for pleasure or recreation, or fraternal beneficiary societies, orders, or associations); and
  5. Relieves the government of some of its burden.
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### **Non-Public Service**

Transportation service that is provided regularly and continuously, or for a specific population that is not open to the general public.

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### **Nursing Home**

A medical facility, licensed by the PA Department of Health that provides 24-hour, long-term nursing care and short-term care options for older adults who do not need hospital care but cannot be cared for at home.

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### **PACE**

The Pharmaceutical Assistance Contract for the Elderly program.

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### **Payer of Last Resort**

PwD is the payer of last resort for shared-ride transportation in Pennsylvania. Funding from human service programs and other sources must be used before PwD funds are utilized.

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### **Personal Care Home**

A residence that provides shelter, meals, supervision, and assistance with personal care tasks, typically for older people or people with physical, behavioral health, or cognitive disabilities who are unable to care for themselves but do not need nursing home or medical care. Transportation to and from personal care homes is not eligible for the PwD Transportation Program.

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### **Persons with Disabilities (PwD) Transportation Program**

The Public Transportation Trust Fund grant program administered by PennDOT to subsidize shared-ride transportation services for persons with disabilities (temporary or permanent) who are 18 through 64 years of age.

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### **Program(s)**

The Senior Shared-Ride Transportation Program and/or the PwD Transportation Program, administered by PennDOT to subsidize shared-ride transportation services for senior citizens and persons with disabilities.

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**Psychiatric Clinic (Outpatient)**

A nonresidential treatment setting in which psychiatric, psychological, social, educational, and other related services are provided under medical supervision. It is designed for the evaluation and treatment of patients with mental or emotional disorders. Outpatient services are provided on a planned and regularly scheduled basis. Transportation to and from psychiatric clinics is not eligible for the PwD Transportation Program.

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**PUC**

The Pennsylvania Public Utility Commission.

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**Reciprocal Agreement**

An agreed-upon partnership between shared-ride transportation service in two or more counties/service areas. A reciprocal agreement allows a grantee to provide service to persons living within the municipal boundaries of the partner agency and achieves the common objective of efficient, affordable transportation.

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**Reservation**

A record documenting each requested passenger trip (passenger name, date and time of trip, origin, and destination address).

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**Senior Citizen**

An older adult 65 years of age or older.

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**Senior Shared-Ride Transportation Program**

The Lottery Fund grant program administered by PennDOT to subsidize shared-ride transportation services for senior citizens, authorized under Section 701 of Act 72 (72 P.S. §§ 3762-701).

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**Shared-Ride Service**

1. Door-to-door or curb-to-curb demand-responsive transportation
2. Available to the general public on a nonexclusive basis
3. Operates on a nonfixed route basis
4. Operates service in published service times and area
5. Charges a fare to all riders

Passengers must reserve a shared-ride trip in advance, at least the prior business day of the trip, and must be willing to share the vehicle with other passengers.

The term does not include exclusive-ride taxi service, charter and sightseeing service, nonpublic transportation, or school bus and limousine service.

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**Sheltered Employment**

At an organization or in an environment that employs people with disabilities separately from others, with exemptions from labor standards, including but not limited to the absence of minimum wage requirements. A noncompetitive job opportunity that is intended to prepare disabled individuals for work in the general economy.

Transportation to and from sheltered employment is not eligible for the PWD Transportation Program.

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**Third-Party Sponsor**

PennDOT-approved entities, such as area agencies on aging, MATP, nonprofit social service organizations (including churches that qualify as non-profit social service organizations), and health care facilities. A transit agency’s third-party sponsors must be entered into grantee’s application and approved by PennDOT.

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**Transportation Company**

An entity that renders public passenger transportation service.

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**Trip**

One-way travel from a scheduled point of origin to a scheduled destination.

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**Waiver Program (also Support Services Waiver)**

An abbreviation for the Medicaid Home and Community Based Waiver Program. The program provides funding for support and services to help individuals live in their home and community. The term “waiver” derives from the federal government waiving Medical Assistance/Medicaid rules for institutional care in order for Pennsylvania to use the same funds to provide supports and services for people closer to home in their own communities. In Pennsylvania, the Department of Human Services administers 10 Medical Assistance/Medicaid waivers. Each waiver has its own unique set of eligibility requirements and services.



# Eligibility

There are three categories of eligibility for shared-ride trips that are reimbursed through PennDOT:

1. Service eligibility,
2. Client eligibility, and
3. Trip purpose eligibility.

Trip reimbursement is contingent upon grantees and clients meeting the requirements of all three categories, which are described below.

## **SERVICE ELIGIBILITY**

To be eligible for program reimbursement (up to 85% of the shared-ride fare, subject to reimbursement limits) for trips provided to senior citizens and/or persons with disabilities, the service must meet all the following criteria:

1. The service must be open to the general public. Any advertising for the service must state that the service is open to the general public.
2. Shared-ride service must be demand-responsive. The service does not include fixed route service, but can include fixed route service with deviation, or shared ride with designated stops, or both.
3. Each passenger must be charged a fare based on the established shared-ride transportation service fare structure.
4. Each passenger, including senior citizens, must be permitted to pay their own fare or share of the fare. Approved third-party sponsors can pay the passenger share of the fare on behalf of senior citizens. PwD passengers must pay 15% of the fare themselves. No third-party sponsors are permitted for the PwD Transportation Program.
5. Each passenger must be willing to share the vehicle with other scheduled passengers.
6. Passengers must schedule trips in advance, at least the prior business day of the trip.
7. The service must be either door-to-door or curb-to-curb, but in no event will the service be door-through-door.
8. Subcontractors used to provide service must be submitted in PennDOT's data collection system and verified by PennDOT. If a change occurs, the grantee must notify PennDOT in writing, obtain approval, and update PennDOT's data collection system prior to implementing the change.

9. Trips must be provided within the service area marketed publicly on the transportation provider's website, in brochures, or throughout any other promotional materials describing service. PennDOT requires the service areas to be submitted annually and updated as changes occur in PennDOT's data collection system. Detailed service area requirements follow.

### **SERVICE AREA REQUIREMENTS**

The service must be provided wholly within Pennsylvania, unless the trip is for medical purposes, or the grantee can demonstrate that providing service to an out-of-state destination is more cost effective than providing service to a comparable in-state destination. In any case, the service must either originate or terminate in Pennsylvania, except for intermediate out-of-state stops as part of a vehicle run that originates or terminates in Pennsylvania. The fare structure and service area in the annual application must include out-of-state destinations.

1. The service area is defined by the grantee and approved by PennDOT through the annual program application process.
  - a. For municipalities, local transportation organizations, and entities operating through substantial county control, the county with the transportation provider determines the service area.
  - b. For PUC-regulated agencies, the PUC-approved tariff defines the service area.
2. Grantees can provide service beyond municipal boundaries if the service originates or terminates within the municipal boundaries.
3. Grantees that have transported passengers beyond their municipal boundaries can provide intermediate trips that begin and end outside of the municipal boundary.
4. Grantees can enter into a reciprocal agreement with another grantee to provide service to persons living outside its municipal boundaries. The agreement must be in writing. An email or letter from one agency to another authorizing them to provide the service will suffice. Reciprocal agreements must be retained and provided during a compliance review.

### **INELIGIBLE SERVICES**

Any of the following characteristics makes a service ineligible for program reimbursement:

1. Same-day trips, unless approved in writing by PennDOT;
2. Exclusive-ride taxi service;
3. Charter, special excursion, or sightseeing service;

4. Nonpublic transportation service – Any service beyond the geographic service area, outside of the days and hours, and/or outside of the general public shared-ride fare structure submitted in the annual application and approved by PennDOT;
5. School bus service; or
6. Limousine service.

### **CLIENT (PASSENGER) ELIGIBILITY**

Grantees are responsible for verifying the age or disability eligibility of passengers. Clients must provide acceptable documentation to the grantee. The grantee must file, at a minimum, the following information (hard copy or electronic) in its registration system:

1. Name of applicant
2. Address of applicant
3. Date of birth
4. Date of application
5. Acceptable proof of age or disability document
6. Name of staff person who verified the proof of age or disability documentation

Grantee must maintain full and accurate records for three years after final payment.

### **SENIOR SHARED-RIDE TRANSPORTATION PROGRAM**

Passengers must be at least 65 years of age to qualify for discounted fares. The following are acceptable proof-of-age documents and must contain a date of birth for the client:

1. Armed Forces discharge papers
2. Birth Certificate
3. Enhanced Tribal Card or Native American Tribal Photo Identification Card
4. EVS printout (MATP)
5. Form I-94 - Immigration Record from Customs and Border Protection
6. Naturalization papers
7. PACE identification card (accepted as age verification despite not including a date of birth due to only being issued to seniors age 65 and older)
8. Passport
9. Pennsylvania Department of Corrections Inmate Identification Card
10. Resident Alien Card issued by the U. S. Department of Justice–Immigration and Naturalization Service
11. Statement of age issued by the Railroad Retirement Board

12. Statement of age issued by the U.S. Social Security Administration
13. State Issued Photo ID Card
14. U.S. Department of Defense ID
15. U.S. Driver's License
16. Veteran Health ID Card

Note: Medicare cards and Social Security cards are not acceptable for age verification.

The transportation provider must obtain a copy of an eligible proof-of-age document. Transit systems must upload a copy into their paratransit software system. Passengers can also utilize FMR Apply and upload an approved proof of age document or enter a Pennsylvania driver's license or a Pennsylvania identification card number which will automatically be verified online through the Department of Motor Vehicles (DMV) database. Only eligible proof of age documents from the list above will be accepted at a PennDOT compliance review.

Coordination of age verification with outside agencies:

1. Grantees can coordinate with other organizations, such as an Area Agency on Aging, to assist senior citizens applying for a Senior Citizen Identification Card only with prior PennDOT written approval of an acceptable Memorandum of Agreement between the grantee and the other organization.
2. Outside agencies must forward proof-of-age documents to the grantee.
3. Only a direct grantee is permitted to issue a Senior Citizen Identification Card and must maintain age verification documentation.
4. The grantee is ultimately responsible for any errors made by an outside agency.

### **PWD TRANSPORTATION PROGRAM**

The following passenger eligibility requirements apply to the PwD Transportation Program:

1. The passenger must be 18 through 64 years of age.
2. The passenger must have a disability as defined by the Americans with Disabilities Act (ADA). Disability must be verified using an acceptable proof-of-disability document:
  - a. Behavioral Health/Developmental Disabilities (BH/DD) Program
  - b. Bureau of Blindness and Visual Services
  - c. Center for Independent Living
  - d. Community Services Program for Persons with Physical Disabilities
  - e. Functional Assessment – performed for ADA eligibility

- f. Individual Support Plan (ISP)
  - g. Office of Vocational Rehabilitation
  - h. PA Attendant Care Program
  - i. Physician
  - j. Registered Nurse
  - k. Registered Physical/Occupational Therapist
  - l. Social Worker
  - m. Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI)
  - n. United Cerebral Palsy
3. Grantees must ensure that there is an application on file for each PwD client, and that each application includes acceptable proof-of-disability documentation.
  4. The PwD passenger must allow the grantee to refer that individual to other potential service providers or funding agencies. Refusal to accept a reference negates a client's eligibility for the PwD Transportation Program.

### **TRIP PURPOSE ELIGIBILITY**

#### **SENIOR SHARED-RIDE TRANSPORTATION PROGRAM**

There is a nursing home restriction for senior shared-ride services. Non-emergency eligible transportation services for medical assistance residents of nursing homes who have transportation funds included in the nursing home facility's medical assistance per diem rate are not eligible for Lottery reimbursement under the Senior Shared-Ride Transportation Program.

Shared-Ride providers are responsible for verifying MA residents with per diem rates. When providing these trips, agencies must bill the full general public fare to the nursing home.

#### **PWD TRANSPORTATION PROGRAM**

There are restrictions on trip purpose for the PwD Program because it is the payer of last resort. In addition, PwD **will not** pay for trips previously funded by other programs in keeping with maintenance of effort requirements. If a program reduces its transportation budget or deems transportation an ineligible benefit, the passenger would be responsible for paying the full general public fare.

A trip taken by a person with a disability is ineligible for a discounted fare under the PwD Transportation Program if any of the following conditions apply:

1. The trip can be provided through another program or resource, including, but not limited to:
  - a. ADA complementary service
  - b. Medical Assistance Transportation Program (MATP)
  - c. Children and Youth Services
  - d. Personal care home providers
  - e. Sheltered employment workshop providers
  - f. Adult training facilities
  - g. Waiver Participants
  - h. Group home providers and other community residential facilities
  - i. Psychiatric outpatient clinic (mental health outpatient providers)
  - j. Senior Shared-Ride Transportation Program
  - k. Nursing home providers
  - l. Public school transportation
2. Another resource can pay for the trip/transportation to that destination, such as the following trip purposes:
  - a. Adult training
  - b. Day programming (including sheltered workshops and socialization)
  - c. Medical (if the trip can be provided under MATP)
  - d. Non-competitive employment (sheltered employment)
  - e. Primary and secondary school bus service
  - f. Psychiatric rehabilitation

# Fares

## **GENERAL PUBLIC FARES**

Each grantee must establish fares for the general public compliant with the following:

1. The fare structure must be established to meet the cost of regular service for the general public, as described under [Service Eligibility](#).
2. Fare structures must be distance-based (non-distance-based fares will be grandfathered until the grantee's next fare increase request).

## **FARE MEDIA**

Acceptable fare media will be determined by the transportation provider which can include cash, coin, check, credit card, pre-payment, tokens, tickets, and/or smart fare media. Transportation providers are responsible for ensuring the required fares are collected from riders. Fares must be document and reconciliation for audit purposes.

## **DESIGNATED-STOP SERVICE FARES**

Because a passenger goes to a designated stop rather than being picked up or dropped off at home, the fare established by a grantee for this service can be lower than the fare for demand-response service.

## **SENIOR SHARED-RIDE TRANSPORTATION PROGRAM CO-PAY**

Eligible passengers pay 15% of the regular shared-ride fare unless there is a PennDOT approved third party sponsor that pays a portion of or the entire 15%.

## **PWD TRANSPORTATION PROGRAM CO-PAY**

Eligible passengers pay the greater of the 15% of the regular shared-ride fare, or 100% of the ADA-complementary fare. If the ADA fare is higher than the 15% co-pay, a PwD passengers will pay more than a senior citizens for the same ride.

## **ESCORT FARES**

If a grantee permits escorts to ride at a reduced escort fare, the grantee must establish criteria for documenting the necessity for the escort. The grantee must receive PennDOT's written approval of both the escort fare and the criteria for escort necessity.

**FARE PAYMENT BY THIRD-PARTY SPONSORS****PROGRAM ELIGIBILITY**

Under the PwD Transportation Program, the passenger is responsible for the entire 15% co-pay. No third-party sponsorship is permitted.

Under the Senior Shared-Ride Transportation Program, the passenger and/or a PennDOT-approved third-party sponsor can pay the 15% co-pay.

**ALLOWABLE THIRD-PARTY SPONSORSHIP**

- Area Agencies on Aging
- Health Care Facilities
- MATP
- Nonprofit Social Service Organizations (including churches that qualify as non-profit social service organizations)

**FARE AMENDMENTS**

The following policies apply to grantee fare amendments:

1. PennDOT will review, evaluate, and approve or disapprove fare changes for grantees that are not PUC-regulated. Grantees must submit fare increase/adjustment 60 days prior to the proposed implementation date. Grantee must receive written approval from PennDOT prior to implementing fare change or submitting for reimbursement. Grantee must notify the public 30 days prior to implementing approved fare change.
2. PUC-regulated grantees must submit all fare increase information in writing to PennDOT when submitted to the PUC.
3. Approved fare amendments must be updated in PennDOT's data collection system within 30 days of implementation.



# Reimbursement

## **GENERAL REIMBURSEMENT AMOUNT**

PennDOT will reimburse the grantee up to 85% of the shared-ride fare for eligible services– not to exceed the maximum allowed with respect to reimbursement limits– under the Senior Shared-Ride Transportation Program and the PwD Transportation Program.

## **SERVICE REQUIREMENTS**

Services are eligible for program reimbursement **only if all** the following apply:

1. Trips are provided in accordance with the terms of the grantee’s application as approved by PennDOT.
2. Trips are provided in accordance with public information (e.g., brochures, websites, etc.). PennDOT expects public information to be consistent with submitted information in PennDOT’s data collection system.
3. Trips for emergencies that are a threat to public safety and/or health. To be reimbursed agency must provide details to PennDOT, receive PennDOT approval, and enter a comment into the paratransit scheduling software system.
4. Trips are completed (i.e., not a canceled trip or a no show).
5. The grantee complies with the following reporting requirement:
  - a. All grantees must complete a Revenue Replacement Report (RRR) with their monthly invoice in eGrants. The invoice is due by the 20<sup>th</sup> of the month following provision of service. Late invoices will delay payment.
6. The grantee collects and documents the collection of the non-PennDOT-reimbursable portion of the shared-ride fare, calculated and paid as follows:
  - a. Senior citizens: 15% of the regular shared-ride fare (rounded up to the nearest nickel), paid by the senior citizen passenger or a PennDOT-approved third-party sponsor, or a combination of both.
  - b. PwD: The greater of 15% of the regular shared-ride fare (rounded up to the nearest nickel), or 100% of the ADA-complementary fare paid by the PwD passenger whichever is higher.
7. Grantees cannot solicit donations from passengers for shared-ride transportation services. All collections from passengers must be based on the general public fare structure.
8. No portion of any escort fare for escorts under age 65 is reimbursable through the Senior Shared-Ride Transportation Program, regardless of trip purpose.
9. Penalties and no-show fees are not eligible for reimbursement.

**BASIS FOR REIMBURSEMENT**

PennDOT will reimburse grantees based upon:

1. Fares approved by PennDOT for local transportation organizations and municipalities that are incorporated into the grantee’s application or amendment.
2. Tariffs approved by the PUC and determined appropriate by PennDOT for shared-ride services offered by transportation companies and are incorporated in the grantee’s application or amendment.

Accuracy of invoices:

If a transportation provider submits an incorrect invoice to PennDOT or later identifies that trips billed to PennDOT were supposed to be billed to another funding program (or vice versa), the transportation provider must submit a revised RRR to PennDOT.

**REIMBURSEMENT LIMITS**

**TRIP LIMITS**

As of July 1, 2023 trips will be reimbursed up to \$63.75 (85% of a \$75 fare) regardless of the full-fare amount.

**GRANT LIMITS**

PennDOT cannot make grant adjustments after May 1<sup>st</sup> of the grant year. Agencies must communicate with PennDOT throughout the grant year to ensure funding is sufficient to cover increases in ridership and/or fares. Grants will not be increased to cover payment shortfalls for service provided in prior grant years.

**RESTRICTIONS**

1. Grantees cannot use funds derived from shared-ride service to subsidize any non-public service.
2. PennDOT reserves the right to recoup, at its discretion, excess program revenues earned through the provision of shared-ride service.

# Compliance

PennDOT can visit grantees on a random, unannounced basis to verify program compliance. Visits can include the following:

1. Inspections by the Pennsylvania Office of State Inspector General;
2. Audits by the Office of Comptroller Operations' Bureau of Audits; and/or
3. Reviews by PennDOT's Bureau of Public Transportation staff or contractors.

Audits can include, but are not limited to, verifying the following:

1. Copayment collection;
2. Eligibility of trips for reimbursement;
3. Grant agreement compliance;
4. Invoice accuracy, completion, and proper fare structure application, and;
5. Passenger eligibility for the Senior Shared-Ride and PwD Transportation Programs.

Grantees must take corrective action on any deficiencies discovered by inspections, audits, or reviews.

For non-compliance in the form of overpayments (calculated through review or audit of program records) on a per-trip basis, PennDOT can adjust future grant payments or require the grantee to refund PennDOT the full amount of the unjustified payment.

PennDOT will consider a grantee's repeated failure to take reasonable corrective action as a failure to comply with funding regulations and can withhold payments until compliance is achieved.

# Grantee Responsibilities

## REPORTING REQUIREMENTS

Due Date	Document Description
<b>May</b>	Public Transportation Operating Application
<b>August 15</b>	<ul style="list-style-type: none"> <li>• Payment Confirmation Report provided by PennDOT to transit agencies</li> <li>• Transit systems provides report to auditing firm. Audit firm starts audit.</li> <li>• Final Unaudited Legacy Budget</li> </ul>
<b>October 31</b>	First Quarter Progress Report
<b>December 31</b>	<ul style="list-style-type: none"> <li>• Final Audited Legacy Budget</li> <li>• Financial Report by Independent Auditing Firm</li> </ul>
<b>January 31</b>	Second Quarter (year to date) Progress Report
<b>April 30</b>	Third Quarter (year to date) Progress Report
<b>20<sup>th</sup> of Every Month</b>	Invoice itemizing and quantifying trips for reimbursement

### **COST-EFFECTIVE PRACTICES**

#### **Fixed Route/Free Transit**

The coordinator must develop and implement a plan whereby senior citizens are strongly encouraged to use fixed route transportation when such services are available and represent an appropriate alternative to shared-ride services. The PwD Transportation Program, as the payer of last resort, cannot be used for any trip where the rider can instead use fixed route service or ADA complementary paratransit.

### **CONSOLIDATED MANAGEMENT**

If cost-effective and efficient to do so, grantee can centralize control of shared-ride activities, such as reservations, scheduling, and dispatching of vehicles or purchasing supplies, performing vehicle maintenance, etc.

### **COMMUNITY INVOLVEMENT**

Each grantee must convene meetings (at least twice per year) of appropriate community and agency representatives to solicit and receive input on shared-ride services on an ongoing basis. Meetings must include, at a minimum: the area agency on aging, medical service providers, persons with disabilities and their advocates, shared-ride passengers, and local elected officials.

### **ADVERTISING**

Each grantee must advertise its shared-ride services as open to anyone willing and able to pay the full general public fare. The advertising cannot in any way state or imply that shared-ride service is an exclusive senior citizen or PwD transportation service.

# Q & R

**Q:** A rider was scheduled at 3:00 PM but wasn't discharged from the hospital until 4:30 PM. This delay caused two riders to be dropped off after 5:00 PM, which is after service hours. Can PennDOT be billed for these two trips beyond service time?

**R:** PennDOT supports agencies in not stranding riders. On the rare occurrence when trip delays occur due to late discharges, Executive Directors, General Manager, or designee can approve the trip(s). A comment will need to be added in in the paratransit software system for both clients. Comment must include:

- Executive Director, General Manager, or designee who approved
  - Time exception
  - Reason for exception
  - Any other information to justify exception
- 

**Q:** Are trips penalized during a compliance review if clients are picked up minutes before agency's 8:00 AM service time?

**R:** PennDOT reviews trips using a 30-minute period before and after for the trip window. The trip window is based on the promised/negotiated time communicated to the client. When a trip occurs before or after service time and is within the 30-minute trip window, it is complaint.

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**Q:** Can an Executive Director approve infrequent trips beyond service times and area due to extenuating circumstances that can be billed to PennDOT and not be penalized during a compliance review?

**R:** Due to extenuating circumstances, a transit Executive Director, General Manager, or designee can approve a trip that is beyond normal service times and area without PennDOT's approval. Approvals must not exceed five round trips per month. Requests exceeding five round trips per month must be approved by PennDOT. A comment must be entered into the paratransit software system stating:

- Executive Director, General Manager, or designee who approved
  - Time or area exception
  - Reason for the exception
  - Any other information to justify exception
-

**Q:** Is a copy of the MATP EVS print-out still an acceptable proof-of-age document for MATP clients over 65 who were grandfathered in, for the Senior Shared-Ride Transportation Program prior to July 1, 2014?

**R:** Yes.

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**Q:** If a same-day trip modification is required (e.g., time change, address correction, etc.), will it be counted as a same-day trip and therefore ineligible for reimbursement?

**R:** No, but staff must document the reason for the same-day modification with a brief trip comment in the paratransit scheduling software (e.g., no-show rebook, same-day address correction, etc.) to provide evidence of a prior-day reservation.

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**Q:** We have a PwD passenger with a caretaker who manages the passenger's finances. If the caretaker submits a check or is invoiced for the PwD passenger's trips, would it be considered third-party sponsorship for PwD?

**R:** No. If the funds paying for the copayment are those of the passenger and not a third-party organization, it would not be considered third-party sponsorship. However, the transportation provider must verify and document the circumstances of the arrangement for auditing and compliance purposes.