



SPECIALIZED SERVICES MANUAL

OFFICE OF PASSENGER TRANSPORTATION

EFFECTIVE as of 9/1/2022

ACRONYMS/DEFINITIONS

Act 51	Act 51 of Public Acts of 1951, as amended.
Annual Application	Section 10(e)6-10 of Act 51 requires the department to annually approve transportation services provided to Seniors persons and persons with disabilities under Section 10(e)(4)(c)(i) of Act 51.
CTF	Comprehensive Transportation Fund.
FTA	Federal Transit Administration.
JARC	Job Access Reverse Commute
LBOA	Local Bus Operating Assistance (a.k.a. formula. LBO)
OAR	Operating Assistance Report
MDOT/OPT	Michigan Department of Transportation/Office of Passenger Transportation.
NF	New Freedom
PTMS	Public Transportation Management System.
R&E Manual	Local Public Transit Revenue and Expense Manual, promulgated annually. This manual can be located at: Audit & Accounting Information (michigan.gov)
Regular Service Provider	Receives local bus operating assistance funds, and is required to submit a regular service OAR
Specialized Services Recipient	Has a project authorization with MDOT/OPT for Specialized Services funds.
Specialized Services Subrecipient	Has a third-party contract with a Specialized Services Recipient for Specialized Services funds.
TA	Transit Agency

SPECIALIZED SERVICES PROGRAM

The Specialized Services Program provides operating assistance for transportation services primarily for seniors and individuals with disabilities. The service to be provided is based on an annual application approved by OPT. The Specialized Services Recipients and Subrecipients are reimbursed per mile or per one-way unlinked passenger trip up to the contract maximum. The Specialized Services Program is a state-only funded program.

This Manual identifies Specialized Services data that must be reported quarterly on the PTMS. Quarterly OARs are due 40 days after the end of each quarter (the State fiscal year begins 10/1/xx) Payment of Specialized Services funds are made upon the receipt and approval of the OAR.

ELIGIBILITY REQUIREMENT

Only the following service provided in accordance with the annual application approved by OPT is eligible for reimbursement under this program:

- Service that is targeted to all elderly persons and persons with disabilities in the service area.
- Service supported by the local coordinating committee and transit agency in a coordination plan.
- Service that does not duplicate or replace existing services funded from other sources.
- Service within the legal service area with proper authority.

The following are ineligible for reimbursement under this program:

- Funds for capital equipment.
- Service or method of providing service is unidentified.
- Service primarily for delivering "Meals-on-Wheels".
- Service using personal cars (except for volunteer drivers).
- Service that cannot be provided by a public transportation provider in the service area.

DIFFERENT TYPES OF SERVICE

Services can generally be classified as being: (1) agency personnel providing service with agency vehicles, (2) volunteer drivers providing service with agency vehicles, and/or (3) volunteer drivers providing service with personal vehicles.

Services utilizing volunteer drivers are eligible for reimbursement if the volunteer driver has:

- A valid driver's license.
- Been licensed for the past five years with no moving violations within the last two years.
- Provided a ride that is not for emergency medical reasons

If the volunteer driver uses his/her own personal vehicle, the additional volunteer driver requirements are:

- The private car must be in a safe operating condition¹ and owned by the volunteer driver.
- The driver has notified their insurance company that vehicle will be used for this service.

REPORTING "AGENCY" VERSUS "VOLUNTEER"

The PTMS has two columns in which to report Specialized Services data. One column is labeled "Agency" and the other column is labeled "Volunteer". Service provided with agency vehicles should be reported in the "Agency" column, whether the driver is paid or a volunteer. Only service provided using personal vehicles should be reported in the "Volunteer" column.

NONFINANCIAL PTMS CODES

610 Vehicle Hours (but not volunteer driver hours for service provided using the driver's personal vehicle.) Total hours used to operate the Specialized Services Program (e.g., drivers' time behind the wheel, drivers' time doing pre-trip inspection, drivers' time driving deadhead miles). "Deadhead" is the travel time and mileage before the passenger is picked up and after the passenger is dropped off.

Note: Miles and Passenger Trip data are required fields regardless of how paid.

611 Vehicle Miles Total miles traveled by vehicles for the Specialized Services Program including deadhead miles and miles associated with purchased transportation service.

615 Unlinked Passenger Trips – Regular The number of passengers who board public transportation vehicles. Passengers are counted each time they board a vehicle no matter how many vehicles they use to travel from their origin to their destination. Include all passengers except those described in 616 – Elderly, 617 – Persons with Disabilities, and 618 – Elderly Persons with Disabilities.

¹ All components of the vehicle must be operable. If an item is inoperable but doesn't affect the safe operation of the vehicle, the defect can be noted, and the vehicle can be operated until repairs can be scheduled and completed. If a defect does affect the safe operation of the vehicle, it must be removed from service until repairs are completed.

616 Unlinked Passenger Trips – Elderly Number of passengers 65 years of age or older who board public transportation vehicles. Passengers are counted each time they board vehicles no matter how many vehicles they use to travel from their origin to their destination. The age limit defining "elderly" may be lower under local option.

617 Unlinked Passenger Trips – Persons with Disabilities Number of passengers not defined as 616 – Elderly and who have a physical or mental impairment that substantially limits one or more of the major life activities of the individual who board public transportation vehicles. Passengers are counted each time they board vehicles no matter how many vehicles they use to travel from their origin to their destination.

618 Unlinked Passenger Trips – Elderly Persons with Disabilities Number of passengers who meet the definition of both 616 - Elderly and 617 - Persons with Disabilities who board public transportation vehicles. Passengers are counted each time they board vehicles no matter how many vehicles they use to travel from their origin to their destination. Passengers counted here should not be counted under 616 and 617.

650 Number of Personal Vehicles in Service Vehicles that are used by the TA to transport passengers in revenue service and are owned by private individuals, typically an employee of the TA or a volunteer driver.

655 Total Demand-Response Vehicles The number of agency and/or subrecipient owned vehicles purchased with MDOT and/or FTA funds used for the Specialized Services Program. Vehicles operated by other agencies through a purchase-of-service agreement or vehicles funded through other sources should not be included in this count.

Note: The number of vehicles in the PTMS vehicle inventory will not necessarily match the number of vehicles reported in 655 Total Demand-Response Vehicles.

656 Demand-Response Vehicles with Lifts The number of vehicles included in 655 that are equipped with a lift or a ramp.

661 Total Transit Agency Employees (full time equivalent (FTE)) All staff (e.g., transit manager, bookkeeper, and bus drivers). FTEs are determined by dividing all employee hours worked (including contract employees' hours) by 2,080 hours for reconciled OAR or 520 hours for quarterly reports (round to the nearest whole employee). Do not count transit board members. If an operator contracts with a private vendor for transportation service, it should include contractor employee hours in the employee hour count.

662 Total Revenue Vehicle Operators (FTE) Drivers and other TA employees who perform driver type duties (e.g., completing pre-trip inspections). These employees are also included in 661. FTE equals total driver hours (including contract driver hours) worked divided by 2,080 hours for reconciled OAR or 520 hours for quarterly reports (round to the nearest whole employee).

665 Number of Volunteer Drivers Individuals who drive vehicles in revenue service to transport passengers for the TA but are not employees of the TA and are not compensated for their labor.

804 Fatalities Report the number of death(s) due to a collision, fire, hazardous material spill, Act of God, evacuation, security event (including suicides), or another event. Fatalities that occur as a

result of illnesses or other natural causes are not reportable. For example, if a passenger suffers a fatal heart attack in a transit facility or vehicle, the event would not be reportable.

A fatality must be reported as such if it is confirmed within 30 days of an event. If the TA receives confirmation within 30 days of an event that a person(s) died due to a reportable event, the agency must report this as a fatality.

Note: If the provider has two or more programs (i.e., regular service or JARC or NF, and specialized service) it is imperative that the passengers and miles must be actual data and kept separate. Do not duplicate data between programs. Using the same data for multiple programs is illegal.

ADDITIONAL REQUIREMENTS

Regular Service Providers on completing the Regular Service OAR:

If the TA has (A) agency personnel providing service with agency vehicles, and/or (B) volunteer drivers providing service with agency vehicles, or (C) provides service for a subrecipient of Specialized Service funds: report the Specialized Service income in code 41199 Other MDOT/OPT Contracts and Reimbursements and deduct the same as ineligible in code 55004 Other Ineligible State Contracts.

As a transit agency it is prudent to know and understand the costs of a program, a cost allocation plan is recommended but does not have to be approved by OPT. Because expenses incurred over the amount of the authorization are eligible for LBOA reimbursement, separating the Specialized Service Program costs from Regular Service costs is not necessary.

If the Specialized Service Program funds are passed thru to another agency, and the TA does not provide the specialized transit services, report the Specialized Service revenue in code 41500 Pass-Through Revenue, report the same as an expense in code 51000 Pass-through expense, and record the same as ineligible in code 54200 Ineligible Pass-Through.

SEEK ASSISTANCE FROM OPT WHENEVER NECESSARY

If you have any questions, please contact your OPT Project Manager or visit our website at [Public Transportation \(michigan.gov\)](http://PublicTransportation(michigan.gov))