



Quarterly Reporting Guide for Access Providers

Please note that this guide may be subject to updates. If there is anything that needs clarification, please send an email to accessforall@cpucsafa.org.

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Overview

- **SAFA:** GCAP Services, Inc. is the Statewide Access Fund Administrator (SAFA) designated by the California Public Utilities Commission (CPUC) to administer the SAFA Access for All Program. GCAP, as the SAFA, is responsible for reviewing and accepting complete quarterly reports for approved Access Providers in the SAFA Access for All Program Funding Cycle 5, CY 2026.
- **Quarterly Reports Requirement:** Per the signed and executed SAFA Funding Agreements, Access Providers are required to complete and submit quarterly progress reports to SAFA that will be shared with the CPUC. Access Providers must complete a separate submission for each county in which WAV services are provided.
- **Reporting Template Requirements:** Access Providers must use CPUC reporting templates when preparing their reports. See section for “Where Can I Find the Quarterly Report Templates” below.
- **Submission Timeline:** Quarterly progress reports must be submitted to SAFA within 30 days after the end of each quarter. See section for “When are Quarterly Reports Due” below.
- **Submission Method:** Reports must be submitted to SAFA via the SAFA Access Provider Portal (SAFA APP). The SAFA APP is the same system Access Providers used to complete their SAFA Access Provider applications.



Where Can I Find the Quarterly Reporting Templates?

The required CPUC quarterly reporting templates are available on the [SAFA website](#) and scroll to the section for “Resources for Approved Access Providers” > “Quarterly Reports”.

Resources for Approved Access Providers

Below are important resources for approved Access Providers for the SAFA Access for All Program to submit monthly invoices for reimbursement and quarterly report submissions per the signed and executed funding agreements for SAFA Funding Cycle 5 (CY 2026).

Invoices (Request for Reimbursement)

- [Access Provider Reimbursement Guide \(PDF\)](#)
- [SAFA Access Provider Invoice Template \(Microsoft Excel\)](#)

Quarterly Reports

- [Access Provider Quarterly Reporting Guide \(Coming Soon!\)](#)
- [SAFA APP Link to Submit Reports](#)
- [Access Provider Templates \(Required by CPUC; See Application Instructions & Reporting Templates\)](#)
 - [TNC as Access Provider Attestation \(only for TNCs\)](#)
 - [Safety Protocol Declaration Form](#)
 - [Access Provider Blank Templates \(A .zip file that includes the following templates.\)](#)
 - [ABCD_YearQuarter_WAVS_In_Operation_1a](#)
 - [ABCD_YearQuarter_Unique_WAVS_In_Operation_1b](#)
 - [ABCD_YearQuarter_WAV_Trips_2](#)
 - [ABCD_YearQuarter_Response_Times_3](#)
 - [ABCD_YearQuarter_Outreach_4](#)
 - [ABCD_YearQuarter_Training_and_Inspections_5](#)
 - [ABCD_YearQuarter_Complaints_6](#)
 - [ABCD_YearQuarter_Funds_Expended_7](#)
 - [ABCD_YearQuarter_Contract_Information_8](#)
 - [Access Provider Templates with Examples \(An Excel/.csv file with CPUC's required templates and examples of entered data.\)](#)
 - [Access Provider Data Examples and Dictionary \(A resource that can help define the fields in the CPUC's required reporting templates.\)](#)



The same quarterly reporting templates can also be found on the [CPUC website](#) and scroll to section for “Application Instructions & Reporting Templates” > “Reporting Templates”.

Application Instructions & Reporting Templates

Interested Access Providers may submit applications and the required information to the LAFA in their county. Applications will be available from the LAFA. For a list of approved LAFAs, including contact information and a link to their website, please see “Approved LAFAs” below. For counties not listed below, interested Access Providers may still apply through the Statewide Access Fund Administrator. Information on the Statewide Access Fund Administrator will be forthcoming. Please check back at a later time.

Reporting Templates:

- [TNC as Access Provider Attestation \(only for TNCs\)](#)
- [Safety Protocol Declaration Form](#)
- Access Provider Templates (effective Q4 FY 2023/2024)
 - [Access Provider Blank Templates](#)
 - [Access Provider Templates \(with examples\)](#)
 - [Access Provider Data Examples and Dictionary](#)
 - [Access Provider Data Examples and Dictionary \(Redlined\)](#)

When are Quarterly Reports Due?

The table below outlines the deadlines for submitting quarterly reports. Because these reports require substantial detail, Access Providers are encouraged to begin preparation early. The CPUC has established the following due dates for each reporting period:

Report	Reporting Period	Due Date
Quarter 1 Progress Report	1/1/26 – 3/31/26	4/30/26 (Thursday)
Quarter 2 Progress Report	4/1/26 – 6/30/26	7/30/26 (Thursday)
Quarter 3 Progress Report	7/1/26 – 9/30/26	10/30/26 (Thursday)
Quarter 4 Progress Report	10/1/26 – 12/31/26	1/29/27 (Friday)

All Access Providers must submit quarterly reports to SAFA every quarter, regardless of funding status. Reports are required even if all allocated funds have been fully expended and must be submitted for each quarter within the calendar year.



What Information is Needed for Quarterly Reports?

Access Providers must provide the following required information on a quarterly basis for each county:

1. **Project Narrative:** A brief narrative description of the progress made by the Access Provider, including any compliance or other challenges encountered.
2. **Project Funding & Expenses:** The amount of Access Funds obligated and used by the Access Provider during the quarterly reporting period.
3. **Number of WAVs in Operation (Excel):** The number of WAVs in operation by quarter and aggregated by hour of the day and day of the week. "In operation" is defined when a WAV: (a) is available to receive a trip request in that quarter/hour/day or (b) has accepted a trip request in that quarter/hour/day.
 - Template: ABCD_YearQuarter_WAVS_In_Operation_1a
4. **Number of Unique WAVs in Operation (Excel):** The number of unique WAVs in operation by quarter and aggregated by hour of the day and day of the week. "In operation" is defined when a WAV: (a) is available to receive a trip request in that quarter/hour/day or (b) has accepted a trip request in that quarter/hour/day.
 - Template: ABCD_YearQuarter_Unique_WAVS_In_Operation_1b
5. **Number and Percentage of WAV Trips Completed, Not Accepted, Cancelled By Passenger, Cancelled Due To Passenger No-Show, and Cancelled By Driver (Excel):** Provide the number and percentages of WAV trip statuses by quarter and aggregated by hour of the day and day of the week.
 - Template: ABCD_YearQuarter_WAV_Trips_2
6. **Completed WAV Trip Request Response Times (Excel):** The number of completed WAV trip request response times in deciles, as well as broken out by Period A (time elapsed from when a trip is requested until the trip is accepted) and B (time elapsed from when a trip is accepted until the vehicle arrives). Response time is the elapsed time between when a trip is requested and when the passenger is picked-up (Period A plus Period B). For example, the Access Provider shall report that 10 percent of all trip requests originating in a geographic area were fulfilled in X response time minutes, 20 percent were fulfilled in X response time minutes, etc. In addition, the Access Provider shall report that Period A time was X minutes for 10 percent of completed trips, that Period B time was X minutes for 10 percent of completed trips, etc. Accordingly, to verify the Access Provider's WAV response times, the Access Provider shall provide WAV trip response times in deciles, as well as Periods A and B in deciles, etc.
 - Template: ABCD_YearQuarter_Response_Times_3



7. **Trip Completion Rate (Percentage from the Excel template for “Completed WAV Trip Request Response Times”):** The percentage of completed WAV Trip Requests calculated by dividing total trips completed by total requested unique trips, multiplied by 100%.
 - No Template. This is a calculation.
8. **Evidence of Outreach (Excel and PDF):** Summary and list of activities to publicize and promote available WAV services to disability communities, how the partnership promoted WAV services, and marketing or promotional materials of those activities.
 - Template: ABCD_YearQuarter_Outreach_4
9. **Certification of Driver Training (PDF):** Certification that all WAV drivers operating on the Access Provider’s platform have completed driver training on transporting peoples with disabilities within the past three years, including sensitivity training, passenger assistance techniques, accessibility equipment use, door-to-door service, and safety procedures.
 - No Template. Provide the training certifications for WAV drivers in PDF format.
10. **Report of WAV Driver Training Programs (Excel):** List of driver training programs completed and the number of WAV drivers that completed each training in that quarter.
 - Template: ABCD_YearQuarter_Training_and_Inspections_5
11. **Certification of Inspection (PDF):** Certification that WAVs operating on the Access Provider’s platform have been inspected and approved to conform with the ADA Accessibility Guidelines for Transportation Vehicles within the past year.
 - No Template. Provide the Certification of Inspection for all WAVs in PDF format.
12. **Number of Complaints (Excel):** Number of complaints received related to WAV driver or WAV services, categorized as follows: security issues, driving training, vehicle safety and comfort, service animal issue, stranded passenger, and others.
 - Template: ABCD_YearQuarter_Complaints_6
13. **Funds Expended (Excel):** The amount of funding that has been expended on this project.
 - Template: ABCD_YearQuarter_Funds_Expended_7
14. **Contract Information (Excel):** Identify the parties to the contract, the duration, the amount spent on the contract, and how the amount was determined.
 - Template: ABCD_YearQuarter_Contract_Information_8
15. **Safety Protocol Declaration Form:** Certification under penalty of perjury to comply with Safety Protocols.
 - Form Link: [Safety Protocol Declaration Form](#)



Are there Naming & Format Standards for the Quarterly Reports?

Yes, there are naming & format standards for the quarterly reports established by the CPUC. Below is the information to consider when preparing the quarterly report submission.

1. **File Format:** Provide all data in CSV format.
2. **Delimiter:** Field delimiter must be a comma.
3. **File Naming:** File naming must consist of four segments separated with underscores and saved as a .csv” file: Access Provider Name, Year and Quarter, Report Number, and Report Name (e.g. “XXXX_YYYYQ#_WAVs in Operation_1.csv).
4. **Complete All Fields:** Fields labeled “Mandatory” must be filled out. For fields labeled “Optional” and there is no applicable data, then enter “Not Provided” in the field. There should be no blank fields on any of the report templates. Any reports submitted with blank fields will be returned to the Access Provider for revision.

Report Name	File Format for Each Required Report
WAVs in Operation	XXXX_YYYYQ#_WAVS_In_Operation_1a.csv
Unique WAVs in Operation	XXXX_YYYYQ#_WAVS_In_Operation_Unique_1b.csv
WAV Trips	XXXX_YYYYQ#_WAV_Trips_2.csv
Response Times	XXXX_YYYYQ#_Response_Times_3.csv
Outreach	XXXX_YYYYQ#_Outreach_4.csv
Training and Inspections	XXXX_YYYYQ#_Training_and_Inspections_5.csv
Complaints	XXXX_YYYYQ#_Complaints_6.csv
Funds Expended	XXXX_YYYYQ#_Funds_Expended_7.csv
Contract Information	XXXX_YYYYQ#_Contract_Information_8.csv
Key: <ul style="list-style-type: none"> • XXXX - Access Provider Name/Abbreviation • YYYYQ# - Year and Quarter of data reporting • # - Report Number (as outlined in above chart) 	

How Do I Submit the Quarterly Reports?

Access Providers are required to submit quarterly reports through the SAFA Access Provider Portal (SAFA APP) in accordance with their executed funding agreements.

To submit a quarterly report, please follow the steps below:

1. **Prepare for Submission:** Before accessing the SAFA APP to upload an Access Provider’s quarterly report, it is recommended to complete all required templates and spreadsheets in advance. This will allow the Access Provider to upload and submit all materials at once.



2. **Access the SAFA APP:** Visit <https://cpucsafaprogram.submittable.com/submit>
3. **Locate the Submission Form:** Scroll to the bottom of the page and select **“Submit”** under *Access Provider Quarterly Report Submission*.

The screenshot shows the SAFA Access Provider Portal (SAFA APP) interface. At the top, there is a header with the SAFA logo, the text "Access for All California Grant Funding Program", and "GCAP Services, Inc. (Statewide Access Fund Administrator)". Below the header, a welcome message reads "Welcome to the SAFA Access Provider Portal (SAFA APP)". Under "Overview", there are three bullet points: "This system is managed by GCAP Services, Inc., the Statewide Access Fund Administrator (SAFA), designated by the California Public Utilities Commission (CPUC).", "For more information on the SAFA Access for All Program, please visit our website at www.cpucsafa.org.", and "For questions regarding the SAFA Access Provider application process, please contact accessforall@cpucsafa.org". Under "Getting Started", there are four bullet points: "To get started, you will need to create a free Submittable account to submit information as an Access Provider.", "You can save a draft of your submissions if you would like to finish at a later date.", "If anything changes with the information you submitted, please send a request to edit the submission.", and "Submittable works best on Google Chrome, Firefox, and Safari. Internet Explorer is not supported. Please make sure you are using a supported browser.", "We will follow up with you about your submission by email. Please be sure to [safelist](mailto:safelist@cpucsafa.org) notification emails from Submittable and check the email you used to sign up for your Submittable account regularly." Below this, it says "For technical questions, please check out the [Submitter Resource Center](#) or contact [Submittable Customer Support](#)". At the bottom of the page, there is a section titled "Access Provider Quarterly Report Submission" with a subtext "Ends on Sun, Jan 31, 2027 11:59 PM". To the right of this section, there is a "Guidelines" dropdown menu and a red "Submit" button. The "Submit" button is highlighted with a red box in the original image. The footer of the page includes "Technical Help | Privacy Policy" on the left and "Powered by Submittable © 2026" on the right.



4. **Sign In or Create an Account:** Log in using an existing Submittable account (used during the solicitation phase) or create a **FREE** Submittable account if starting as a new user.

5. **Accessing the Form:** Once logged in, the submission form for the Access Provider Quarterly Reports will be available to complete.



- Add Collaborators (Optional):** To add collaborators, scroll down on the form and click on “**Manage Collaborators**” and add the collaborator’s email address.

- Complete the Submittable Form:** Next, Access Providers should upload all required quarterly reports into the appropriate submission fields in the SAFA APP.
- Submit the Form:** Once the Access Provider has uploaded all materials and completed all required fields, then the quarterly report can be submitted on SAFA APP.
 - Need to make changes after submission? Please email accessforall@cpucsafa.org to open your submission for editing. Do not submit a duplicate report.

Questions & Support

If Access Providers have questions or need support on quarterly report requirements, please send an email to the Statewide Access Fund Administrator (SAFA) Team at accessforall@cpucsafa.org.