

SmartWay Webinar Series: The New, Improved 2016 SmartWay Truck Carrier Tool January 20, 2016

NOTE: < > bracketing indicates explanatory text or web links not stated in the presentation

Cover Slide – Mary Walsh

Mary Walsh, EPA: Now the recording will begin.

Covered Today – Mary

Alright, here's a little outline of what we're covering today: first the background, then we're going to go into the new features for this year's tool compared to previous tools, especially last year's. Then we're actually going to move into a demonstration in the tool itself, where I'll be walking through an example tool and showing you where the data entry fields are and talking a little bit about it. And then I'm going to give you some hopefully helpful hints about the tool when you're filling it out.

Background –

This program, SmartWay, a voluntary market-based program as it says right there on the slide, was begun in 2001. The idea was to show what the freight industry is doing in terms of sustainability and efficiency practices and look for ways to improve the efficiency and competitiveness of the industry. And in so doing, we're looking to reduce the release of harmful emissions, including greenhouse gases.

Now, we formally launched our SmartWay—what we call 1.0—in 2004, and we've been improving the tool every year ever since. We've been gaining partners in various categories and currently have over 3,000 carriers, as well as over 250 shippers as SmartWay partners.

Background –

Now mentioning those shippers, some shippers do require carriers to participate in SmartWay, and they're wanting to know what the carbon footprint of their carriers are if they're interested in their sustainability reporting. So they want to have a way to look at carrier data to rank among one another, and SmartWay can help them do that. You can also see that they're also using them in stockholder reports, in their media, in their communications with their customers, and our multinational companies are also finding increasing global requirements for them in terms of carbon reporting. So SmartWay can help with all of these.

Why Participate? –

Why should you participate? It goes down to fuel use. For you, your fuel use has to do with your expenditures for operations. You're in business to make money; well we're in business to reduce emissions and improve the environment. So it's a win—win for you in the reducing expenses area, and it's a win, win for us when we're able to reduce emissions, especially CO₂. We find in many cases that reducing fuel and diesel also reduces other harmful emissions, so there's a co-benefit there.

SmartWay is an Integrated System –

On this graphic, you can see that we're showing you a few things. We're showing you that SmartWay is an integrated system where there are several different kinds of tools. You have six types of carrier tools: truck, logistics, barge, rail, and multimodal; new for 2016 is our air tool. We had a beta version available last year, and it is now a complete air tool for this year, no longer considered a beta tool. It's gone through its shape-down cruise. In addition to those six tools, we have a shipper tool. And as we mentioned before, shipper tools are looking at their carriers and seeing how they are doing in terms of their ranking in environmental performance. Now when I say it's an integrative system, in a moment I'll show you how the progression of tool submissions from carriers feeds up the line to multimodal to logistics to shippers. We'll get to that screen in just a moment, but to continue with this little overview screen.

We have this process where it starts with your data collection and you submit your data to us, and we process it through the SmartWay tool, or you actually do it by filling out the tool. The tool has various quality assurance and quality control mechanisms in it to try to make sure that the information that we are receiving from you and the processes we use on it are going to give us the kind of information that allows you to understand where you stand in your environmental performance, allowing you to benchmark and compare in successive years how you're doing. Another source of our quality assurance is our staff reviewing the SmartWay tools. They are your partner account managers. I'll mention them again in the future, but they are, when I talk about your SmartWay partner account managers, there's staff here who you can think of as your personal consultants for all things SmartWay.

Now the SmartWay process produces six emission factors *<that fall into six emission metrics>* that can be used in order for this benchmarking process. Now the SmartWay database is where all the information that you're submitting through the tool will go after you submit it to EPA; then we will upload it to our database. That's where we keep and manage all that information year after year. This is where we're allowed to manipulate the data so that it allows industry benchmarking.

I showed you a moment ago the SmartWay home page. Here's another small image of the SmartWay home page. This is your resource center for all kinds of things dealing with the SmartWay program, including downloadable versions of the tools, user guides, technical documentation—and I'll show you in a moment again the webinars, how to access the webinar schedule, program descriptions, information on our quality assurance, various other research, and technical reports. It's really worth going through it, taking a look, spending some time, and surfing the SmartWay website to see all the resources that are there. There's more than that that I could even spend time talking to you about today.

SmartWay's Current 6 Emission Metrics –

I mentioned a moment ago that we have these six emission metrics. We have three pollutants that we are looking at: carbon dioxide, oxides of nitrogen, and PM, or particulate matter. Here you see each one is of consequence to us and has an effect on the environment or human health, which you may or may not be aware of why we are regulating. As you can see there, the characterization of each of these pollutants and why it's a concern for us.

Over here we talk about the two kinds of metrics we are looking at. We're looking at the grams of a pollutant, CO₂, NO_x, or PM, emitted per mile traveled. The other, which gets more to efficiency, grams per ton-mile, is the amount of that pollution produced for every ton that travels 1 mile. We say that's usually the best metric to use because it goes more to efficiency.

Covered Today –

Alright, moving through our outline, what's new this year?

What's New This Year? –

We've been asked over the years by our existing partners, "Is there a way I can use the data I've already put into previous years as a starting point and then adding my new information for this year?" We haven't been able to do that until now, but starting this year, there is an option for auto-populating the first three steps of the tool when collecting your company name information and your company contacts, how can we reach them, fleet descriptions, which is something you'll all see when we walk into the SmartWay tool itself. You'll see where the steps 1, 2, and 3 are. Now you'll have this opportunity, in fact, but if you do choose to auto-populate, you will actually be required to go back and look at the information from last year that you're using in auto-populate and verify that, "Oh yeah, these are the same people, this is the same address as last year. We didn't move. Oh, our working contact actually moved on--we need to put the new contact there and their information." After you've verified that, you can move on with the tool.

We've also tried to reduce work for entering the source of various kinds of data among different fuel types. Instead of having to enter diesel, natural gas, gasoline, whatever you happen to have, if you're using the same data sources for each fuel type that you're using in your fleets, you can actually just replicate the different fuel types, the data sources, and then edit them as necessary as the program. Actually, there's a separate screen for electric, I should have said that. But for different other fuels you can save time and energy by just editing if necessary and not having to put everything in manually one by one.

Another improvement: we're using fewer screens, and we're asking for less data entry, so we're streamlining the process. We're also taking a lot of text off of the screens. You look at the screens and it's text-heavy, and it's already looking like, "Oh my goodness, this is a lot of work." Well, it's not necessarily that much work. We've tried not to make it look like it's more work than it actually is. We hope that you returning users will be pleased with what you see.

Another big change that we see this year for SmartWay is how new partners, or prospective partners, I should say, people who are interested in raising their hand and saying, "I'm interested in joining SmartWay. I haven't been a partner before but I'd like to be contacted and have someone talk to me about how to join." You would go online—and I'll show you that in a moment where you go—and you're basically completing steps 1 and 2, and if you wish you can go as far as the third step of the tool online. When you complete that, you are an Applicant, and then you'll have that interaction with a partner account manager to help you move forward from there. When you actually do get around to filling out the tool and say, "yes, I want to be a partner; I want to move forward," once again, you'll be able to auto-populate the tool with those first three steps. So hey, you're jumping ahead in the tool and already have some of that work done.

We thought by doing it this way, we can have upfront coordination, communication between us here at SmartWay, who have the information about how to fill out the tool, and you. And you'll have the information you want to share with us, and that's where the partnership comes. We found that a lot of people's first exposure to SmartWay is doing a tool. What we wanted to do is bring you into the program knowing who you can talk to if you have questions, and having a little basic information about how you can make the tool process a little easier by knowing where your resources are and what kind of data you need to collect, etc. So, that information is

available on our “Join” section of the home page and it goes to our “For Carriers” area. A little more on that in a bit. We even have a document on the website that has a complete list of changes for this year for those who wanted to see what the differences are summarized.

Covered Today –

Alright, moving to part three here. We’re going to the demonstration of the partner online application.

SmartWay Online Application –

So as I mentioned a moment ago, this is the SmartWay home page, and we go to the “Join” area. You want to click on this hotlink right there.

Joining SmartWay as a Freight Carrier –

It will take you to this page right there and it kind of walks you through with a little background on SmartWay. There are these links to carrier overview, SmartWay components, overview of the partnership, and highlights of environmental achievements. When you look through these things, it gives you a little more to go on to help you decide, “Is this something I’m interested in, that I want to do?” Hopefully you’ll read through that and, knowing a little bit more about SmartWay, decide, “Yeah, I want to move on. I want to complete the SmartWay partner application.”

SmartWay Partner Application (the SmartWay Onramp) –

It will take you to this page, and the first thing you’ll do is indicate your partner type. For those of you on the call today, you’ll want to indicate your carrier partner. In fact this is the only one that’s active right now. We have led with these new improvements with the truck carrier tool. We’re going to bring the rest of them online as the year progresses for multi-modal, logistics, and shipper, and next year we’ll be adding processes for our remaining categories: air, barge, and rail.

SmartWay Partner Application (the SmartWay Onramp) –

After you’ve indicated what kind of partner you are, you want to review the partnership agreement where it talks about what our responsibilities towards you are, and one of the most important things actually, making sure that your data is secure. The data that you are sending us is not going to be shared with the public.

And we’re also going to commit to publicizing your status as a SmartWay partner and putting your name on the carrier list. It will be available on the website. We also have recognition programs for the top performers who are showing the way in their operations, their practices, in the equipment they are using. They sort of say, “Hey we did this, and it worked for us.” And we have a way of recognizing them. We’re also going to provide you with information that, as I mentioned before, allows you to benchmark where you are the first time you fill out the tool.

And then in succeeding years, you can compare the information that you’re getting back from us with your benchmark information and see if you’re progressing. And if you’re not progressing, or only progressing in certain areas and not others, you can work with us to get insight as to what you can do to make improvements in the areas where you think you can do better.

And on your side, you agree to give SmartWay a program update every year by filling out your tool. You commit to always having your executive and working contact available for us and letting us know when there’s a changeover. Your company agrees to make sure that there’s a

continuity of operations there; if somebody moves on or retires, we always know who to contact, and you will let us know.

The rest of the terms are laid out there. I don't need to go through them point by point, but you will just click that box and it will allow you to go to the next step.

SmartWay Partner Application (the SmartWay Onramp) –

Here are the next two screens where you enter your company and contact information here and here. And optionally, you can start even entering your fleet information. Here's an example of some of the information you'd be adding, ways your customers identify your fleet, the way you identify your fleet. For example, if you have two fleets in your company, and one's an international operation, one's a refrigerant operation, and maybe one's LTL. These are the ways your company is going to look for, even your fleets, to hire you. They want to get specifically that right fleet, and you'll put that name in there and your operations' body types, etc.

Step 5 Confirm and Submit –

Alright, when you complete that step, you're ready to go ahead, check your information, and submit to SmartWay. And within three business days you will be contacted by a SmartWay partner account manager. Remember that person I said was your personal consultant? They're going to work with you to give you information on how to get started, what information you need to collect, where your resources are, and alternatively you can always use the SmartWay Helpline to get in contact with us.

Covered Today –

Alright, next: truck tool demo.

Truck Tool Demonstration –

This is my cue to switch over between this PowerPoint presentation and my example tool to display for you; so what I'm going to do is escape out of this, and I'm going to go to my tool.

Welcome to the 2016 SmartWay TRUCK Tool –

<on screen: view switches from slide presentation to Truck Carrier Tool example file>

When you go online to the website and download your SmartWay tool, this is the way our welcome screen looks right now. You'll sit there in awe and then you'll hit the "NEXT" button.

Assistance for New Users –

<on screen: "Assistance for New Users" screen, showing intro video and button links>

Alright, here's the screen, "Assistance for New Users." For those of you who've completed the tool before, it's up to you. You can enjoy watching our little video, which is a little introduction, or you can check out, "Making Sure You Have the Right Tool." You might say, "Am I properly a truck carrier, or am I really a multi-modal company or a logistics company?" You want to make sure you've got the right tool, so this provides more information for you.

It talks about what kind of data you need to gather. It gives you a little preview of that. You definitely want to know what kind of data you want to gather before you commit to going through the rest of the tool. More on tool help and navigation. What do these buttons do? Why do we have them? Schedule of tool due dates and link to the SmartWay website.

Data Year 2015 – Partnership Annual Agreement –

<on screen: SmartWay Partner Agreement with check box>

Here's our friendly "What we commit to do for you and what you commit to do for us." Check the box, "Yes." You have to make sure that somebody in your organization is empowered to agree to this before you can click the box and move forward. "I understand and agree to the terms of the agreement." Make sure the right person < *the Executive Contact* > knows about them and what's being committed, and you'll be ready to move on.

I forgot! <*does not advance to next screen*> That's what happens when you don't check the box. It will stop you. You really need to do that.

Data Year 2015 Option to Autopopulate

Alright, here's where we can auto-populate. Now those partners who've already filled out a tool have a partner ID number or got a partner ID through the SmartWay application process. Now, if you have that ID, this is where you use it. You put it in here and that will allow you to auto-populate the tool with the data you've already submitted.

Now maybe for some reason you don't have the SmartWay ID number with you, you can't find it, then your SmartWay partner account manager can email it to you.

Okay, so when you complete that step and enter that there and you want to auto-populate, you can click that button there; however, if you don't have your SmartWay ID for whatever reason, you can still continue here <*but without auto-populating any fields*>. In any case, you hit the "next" button and that brings you to this screen.

Data Year 2015 – Home Screen

Now this is a filled-out tool ... This is a different tool than the one that's auto-populated, so I'll have to just verbally tell you what happens here if you've auto-populated. I didn't in the previous step, so I'm going to go back there, and then I can go forward again.

For the contact information and fleet description, if you've previously filled them out, there'll be a little box here and a little line that will tell you to look at the contact information and fleet descriptions that have been populated there. You'll have to actually go there, click on this and this, if you've filled that out too, and review to make sure, "Oh, I forgot Tom isn't our working contact anymore; Denise is our working contact. I better go fill it out." This is just a quality control process that we're doing, making sure. We want to make it easy for you, but we want to make sure it's right. If those are auto-populated, you'll just have to do that.

SmartWay Contact Information –

Now contact information you'll have to review. It will look like this. Or if you've happened to fill it out before, you'll be working through it this way. It's starting out with your company information, and then you'll move to your working contact information. This is the person who will probably be filling out the tool and dealing most directly with the partner account manager. And then your executive contact is the person who actually has the power to agree to the partnership agreement that we looked at a moment ago. That's the person who also commits to making sure that the position of working contact is staffed, or if the working contact departs or is unavailable for any reason, that somebody else is slotting that position and that the EPA is contacted about that. We say that the executive contact should be vice president or a higher level representative.

Alright, the next tab is your working contact. You can fill in the company information like the address information here by clicking on that button. Then you'll add the unique information for this person down here, and then the same kind of work being done for the executive contact. You may have alternative contacts or additional contacts that you want to add. You can add new contacts, and as you can see, it gives you the same kind of opportunity to enter information. Look, I can click that button again and give that address.

Well I just decided not to do that. I probably shouldn't have gone there, but that's okay. Oh, well this is a good opportunity to show you one of our quality control features of the tool. If you forgot to do something, you can either validate screen, and it will come up with this kind of information, or sometimes when you hit okay to go back, it will tell you about it anyway, whether you wanted to know about it or not. It's going to tell you, no, you didn't do that.

I'll fix it now, yes. It told me where I was and what I needed to do. And now look what happens. We're happy now. You can also delete a contact. Yes, I do want to delete that. Enough about contacts. Everything looks good. It's a beautiful thing. I want to go back to the home screen.

Data Year 2015 – Home Screen

Here we are. Alright, fleet descriptions. *<selected one pre-populated fleet by double-clicking>*

SmartWay Truck Fleet Description(s) –

This is the last part of the auto-populate stuff that you can have done, but you'll have to review it and go through each of the tabs to make sure you've checked through everything where you identify. Step 1 was your partner name, and then Step 2 was the contact information. In this step, you want to submit a fleet identifier. People are hiring an LTL fleet or your temperature control fleet. You want to give it an identifier that your customers are looking for to hire you. And then it gives you your fleet name, which is this plus this equals that. Okay? You see how that happens there? Very straightforward.

Something I could mention here, if you don't know what we mean by something, if you click on the little question box, it lets you find out a little more—hopefully helps you out there. There are also the screen demos. Click on the “Screen Demo” and you hear me walking you through, an image of the screen with my little arrows and highlights talking about what you're doing in sequence to complete this screen. This is just saying okay, you need to know that this is exactly the way it's going to appear on the SmartWay website when you are looking for a particular SmartWay fleet. This is what it is going to be shown as, and they are just asking you to verify that.

The operation page. This is very straightforward too, but if you're not sure what we mean by each of these, especially less than truckload, sometimes there's confusion between less than truckload and package delivery, so do make sure you know which is which. In fact, this is even going to stop you before you move on as you indicate anything there and say, “Are you sure you know what you're doing? You've got to categorize the correct way. Okay you do. That's a wonderful thing.”

Whatever you add up here is going to add up to 100 here. Wherever you see white boxes, those are boxes where you can actually enter data. If it's shaded, it means it's not available for you to fill in.

Body types. Let's see. Review LTL and package fleet definitions *<if you select these categories, select their small "question boxes">* to make sure we got them in the right place. Just because we wound up having so many situations where there was confusion and the wrong information was actually entered, we're just doing that to make sure.

Here's our list of available body types. And if you're not sure what any one of these mean, remember, you can always click there *<on the small "question box">* and get an explanation and see, "Oh yeah, just as I thought. This live stop trailer does go under special hauler." Same deal, you can fill out these white boxes and they need to total 100 for each line.

SmartWay category. Based on the information that you've input, it's going to assign a category. As you can see here, LTL, it looks like it wound up in this category here: "Less Than Truckload - Dry Van." The body types information—temperature control fleet—is a refrigerated fleet. If you want to get more information, you click on that button here.

Before you can move, if you say, "It all looks good to me; I'm a happy person," you can't go to the Home screen yet--you have to select the "Create Fleet(s)" button. Now I've already created fleets, so it's not going to do anything for me here, but you need to create fleets from this page as you're moving through the tool unless you've already completed this section.

Data Year 2015 – Home Screen

Because I already completed fleets when I did this example tool, it lets me go without challenging me in any way. So we're now on Step 4. You'll notice these checkboxes. They just tell you where your progress is through the tool. Each checkbox gets completed as the data is satisfactory indicated.

I just wanted to mention to you, the next time I get to a screen where it has a validate screen, that's really important as you go along to take advantage of the validate screen button, so I'll talk about that in a moment.

Okay, now we're to data entry. For those of you who have already auto-populated your first three steps, this is where you really start to get into the thick of it. What you wind up with when you're done with this stuff is to have these say "complete." But before you do, or if you're only partially done, it might say "incomplete," or "error," or "not reviewed," "not checked yet." Probably it's going to say not checked if this is your first foray into the tool. And when I say first foray, I mean you haven't been working on it, saved it, and couldn't come back to it.

You can save the tool at any point. This is really important. You might want to be saving your tool as you go along. It's not necessary, but if you know you're going to be departing the tool, you're going to lunch, or closing up your computer for the day do make sure you save. Even if you hit "Quit" it's going to ask you to save just as a safeguard. You want to save the tool, and then when you open it up again it will show you how far you got, which is great. You can just pick up where you left off.

Alright now, when you're in Step 4, if you've got more than one fleet, you'll just handle them one at a time. You'll double click on the name of the fleet or just hit enter. I'm going to double click because that's faster.

Truck Seville Enterprises LTL – General Information

There are a series of tabs across the top here that you can see. Only the tabs that you need to fill in are not shadowed. Unshadowed tabs are where you have to go. If you already indicated that you have different kinds of fuel types, they'll come up, they'll be bolded, they won't be shadowed here. You need to go through and complete each tab that's not shadowed. I indicated in this example only diesel fuel, so that's why we just have general information on this screen and these other two tabs. You'll always have to do data sources.

SmartWay, you may or may not know, is administered in both the U.S. and in Canada. The program originated here in the U.S., a program of EPA, and Canada was interested in doing SmartWay, so they are what I call our sister program. They are exactly the same tool except that the user interface is different. If you use the Canadian tool, you have the option to have them French or English, and you can also indicate your metrics. It can be either the English system, like we use in this tool, or you can use the metric system. Here we ask you to indicate the approximate percentage of operations in the U.S. and Canada. Generally, wherever your headquarters is, is the nation of the tool you should be using. If your headquarters is in the U.S., fill out this tool. If your headquarters is in Canada, you need to go with Canada's website, National Resources Canada, or Canada's energy website, and you can find your way to the SmartWay tool for Canada. This one is 95 percent U.S. operations, 5 percent Canada, so you'd probably want to fill out the U.S. tool there.

Next, if you want to know what does that mean, "my operations," click on the question mark button and it will give you more information on how you define that. Alright, I indicated here I just have diesel, or biodiesel, so that's going to be the only one that's lit up there. Short-haul versus long-haul split, as it says here: 200 miles of travel or less=short-haul; long-haul=anything over 200 miles. Try to give us your best approximation there. Because my categorization of this fleet is less than truckload/dry van, you will also have to fill in this area. You don't have to fill in this for all categorizations, but this one will need to be filled for an LTL/dry van.

You can either click the "next" button, or you can hit the tab.

Truck Seville Enterprises LTL – Engine Model Year and Class

This will take you to the "Engine Model year & Class" screen. This screen lets you indicate, by model year, engine model year, and by class, your trucks. Engine model year isn't necessarily the same as the vehicle model year. What we're going for here is the engine model year, because it's the engine model year that's regulated and there are differences in the requirements for emissions controls for different engine model years. We want you to indicate model years and class. You can get rid of classes of trucks on this screen that you don't have in your fleet by clicking on that. It just clears up the screen and makes it a little easier to look at and use.

Your totals for each—so this line, it goes across for years—so your totals for an engine model year are going to be here in this shaded column. It's computed. And your totals for each class are going to be computed at the tops of the column right there. Then you have the activity information screen.

Truck Seville Enterprises LTL – Activity Information

Now I probably shouldn't have put three truck classes there because it looks like, "Wow, that's a lot!" But this information in the unshaded are is computed for you. So you're looking really at putting data in whatever is a white field. That's where you're going to put your information. If you've done your worksheets, which are available in our quick start guide, you will already have

this information ready to input here. You'll see the information for each class is separately collected; as we mentioned before, for each fuel type this information is separately collected. So you have total miles, revenue miles, empty miles, gallons of diesel used. If you had a refrigerated fleet, you'd have an additional box asking you to complete the information on how much refit fuel you're using. If you indicated that you're using biodiesel, you can use the biodiesel worksheet.

Whenever you see this little green button that looks like this on this page, it's a calculator that helps you work out what the right answer that needs to be put into an area is. So you click on a calculator. Let's see if I can do that here.

SmartWay Fuel Allocator Worksheet –

This for the fuel allocator across classes. If you know your total gallons of fuel, you can enter in your approximate class MPG. Excuse me, I got that backwards. Let me put it alongside here. Look here.

You have input this information here. Right? So you're going to be able to calculate your gallons of fuel used across classes, using this worksheet here. As you can see, there's a matchup here for that. And you do that for each class. I'm covering over the other two classes, but you can do this for each class, and it allocates it for you. You don't need to have that information. If what you're doing here matches the information you've previously given, it will give you a match. If you have no match, then you will have to go back and check that the information that you're putting in here is correct, that you didn't have a missed stroke, or that you didn't collect it from the wrong column or whatever—so another quality control check in here for you. And as long as you get a match, as long as you're within 2 percent, you're good.

Truck Seville Enterprises LTL – Payload Calculator

More information that you have payload calculators to help you for each class, calculates your cargo weight. And this is an important point: it's not the total weight of your trailer, your truck and trailer combo; it's just your cargo weight. Cargo volume, again a calculator to help you get that number. Average used cargo volume percent. This is only for loaded miles. You do not average it or put into the computation your empty miles. Road type speed categories. This is your distribution of urban and rural driving.

SmartWay Road Type/Speed Categories –

You can either provide the data that you collected yourself or, if you only know your highway versus your urban driving percentage, you can use default values to actually break down, and it uses standard defaults that are typical of the industry.

SmartWay Idling Hours Calculator – Idling Hours Calculator

And also you have an idle hour calculator, and that allows you to indicate your daily long-duration idling, which is longer than 15 minutes, versus your short-duration idling, average days in service per year. It computes for you your average idle hours per truck over the course of the year.

Truck Seville Enterprises LTL – Activity Screen

So see we have a variety of help here. And again, if you're unsure of what we're asking for, click on the little button or go to the screen demo—a little mini movie—education films.

Here's a shaded box because of the model years I entered for engine model year. If they were 2006 or earlier, this button will be highlighted and you'll be able to enter information like, "did you use a diesel particulate filter, oxidation catalyst?" There are always some options that you can indicate for a particulate matter (PM) reduction that you may have used for those engines. When this screen is done, you really want to validate the screen. This is the message you want to see.

If there are any issues with the data, you will see a yellow or a red window, a yellow window and red warnings. You need to click on the window and see what it tells you, or the validate screen. If there were errors, you would have the option of finding out what it says, where the problem is, is it out of range compared to typical trucks in your description. It helps you figure out where the source of the problem is. You can complete the tool if you have yellow screens, but we would like to have an explanation for why they are as they are. But you cannot go further if you have red warning windows in there. So you do want to click on it and it will, when you put in an explanation like, "my loads are lighter than usual because I carry potato chips." Oh that makes sense. When you put that explanation in there, you will go from a red to a yellow.

Now your explanations, your comments, are read by your partner account manager when they're reviewing the tool. They're going to know if you said, "I was carrying a load of balloons or feathers." They're going, "Hm. I don't know about that." "My truck is that light because it's about to float away." They're actually going to take a look at it and make sure it passes the laugh test. Though we believe you always put in excellent, high-quality information, it's nice to know that someone's checking to see what you have to say about it.

Alright, so we've validated the screen. It's a beautiful thing. Now "Data Sources." You can hit "Next" or you can click on the tab.

Truck Seville Enterprises LTL – Data Sources

I have just one fuel type here, so I have only one column, and you have drop down menus that allow you to look at data source.

SmartWay Data Source Description –

Sometimes you will have to fill out your source detail for a selected data source. You have different choices for what you hit. Let's see. If you hit other and certain other choices, you won't be able to fill out anything in this box. You see two little dashes there. You absolutely have to fill in this box where you give a verbal description of the methods you used to develop your estimate for that data field, in this case total miles driven for your diesel fuel vehicles.

See it's asking me to put something there and I didn't, so it's going to stop me before I can go further.

Truck Seville Enterprises LTL – Data Source Description

Okay, it's happy now. Now if you put "aaaaa" there, your partner account manager is going to see that and say, "I'd like to know more," and they'll probably contact you. If you have a different fuel type, say I have diesel and gasoline fuel trucks in that fleet, there'll be another column here wanting you to fill out all the same information, but there'll be a button right about here that gives you the option of putting all the same information for diesel into your gasoline column. So that's where you want to start. Then you want to say, "Is it the same for all of these?"

It may be all the same, but you have the ability to go in and edit based on any difference that might exist. When you're done with this, you can go home. Move on to the next step.

Data Year 2015 – Home Screen

You have the opportunity to give us feedback. <"Give Us Feedback" button selected>

Give Us Feedback –

That helps us to know what we're doing right, what we're doing wrong, and bright ideas or suggestions you may have.

Data Year 2015 – Home

Finally, generate an .xml data file. You're not done with your tool until you generate your .xml file. <"Generate a (.xml) File" button selected>

Data Year 2015 – Generate a (.xml) File

<On screen: partnership agreement displayed again, and opportunities to input your SmartWay ID number and to answer a question on how you first heard about SmartWay>

Once again, you're saying, "I understand the agreement." You'll be asked to answer questions about whether you are an existing partner or not. It's going to ask you to put your partner ID number, or have it emailed to you if you don't have it. If you're a new partner, it's going to ask you how you heard about it. And then at this point, you'll finally be ready to generate your file.

Data Year 2015 – Instructions for Submitting File

You'll save your file and it's going to generate two versions: an .xls and an .xml file, but you're not done yet.

After that file's been saved, you have to send your .xml file at least—you can send both if you don't have troubles with your mail system handling big files—to your SmartWay partner account manager.

Data Year 2015 – Instructions for Submitting File

And then, only then, are you done with your tool submission. And when your partner account manager gets that, he or she is going to review it and may contact you with any questions. If it's all good, you'll be getting a message from them letting you know that. It's not like you're casting it into an abyss. You will hear one way or the other; either they'll have questions, or it's all good.

When this is done, you'll have the ability to get some of those benefits of the SmartWay tool. You can view your data reports, you can look at your year-to-year performance. It compares what you submitted last year and your results and your six data metrics; grams per mile; grams per ton mile for NO_x, PM, CO₂.

SmartWay Instructions for Submitting File –

Oh, this is showing "congratulations, you've saved your files." Here are the two formats. It tells you what to do: send them to EPA <email them either to your Partner Account Manager (preferred) or to the SmartWay mailbox: smartway_transport@epa.gov>.

Covered Today –

Okay, I've finished with the tool and I wanted to go in and look at the reports. We're running a little towards the end of time and I want to make sure that we do have time to answer questions that have come in.

Data Year 2015 –

Most of the data reports are summaries of the information that you submitted.

SmartWay Reports –

Now there's just the one internal metrics report: it's where your computations by the tool of your CO₂, NO_x, and PM emissions for your fleets are *<each by grams per mile and by grams per ton-mile>*. Your six metrics are there.

Covered Today –

I think I'm almost done.

2016 SmartWay Schedule –

<on screen: flow chart showing tool availability dates, due dates, and information flow>

This is the SmartWay Schedule truck tool. We have so many. We have group 1, group 2, group 3; we have to know what group you're in. We'll find that out if you're a new person by talking to your account manager, otherwise you should know by emails from your partner account manager which group you're in and when your due dates are.

Here are the various carriers. They go into the multi-modal tool. The multi-modal carriers use all this information and put it into their tool. All this information in turn can go into the logistics tool for whatever carriers are being used by a logistics company. They submit a tool as well, and finally all the information that may have come from these earlier tools goes to the shipper—as appropriate—whatever the shipper has utilized for their carriers and their logistics company at the end of the year. So there's a reason why we do this in this particular order and why we have the due dates we do. It's all based on your previous year's data collection--the 2016 tool collects for 2015 data year.

Please Remember –

Please remember helpful hints. Know who your account manager is probably number one. It's there at the bottom, but it should be at the top. Make sure, since we send out a lot of emails, that you have us set up as a trusted source. You can usually adapt your spam filters so that certain sources are not automatically thrown into the spam filter. Pay attention to what's getting sent. We keep you aware of webinars, deadlines, helpful information, etc. Always make sure you have that backup person in your organization if your contacts are unavailable, they can't reach them. And always make sure your contacts, executive and working, are up to date. Do you use SmartWay for benchmarking and improvement? I didn't spend enough time today talking about how you, other carriers, and shippers can access your rank based on your six metrics. Your *<exact>* information is not shared, but your ranking is. And you can also use the benchmark information you received in the metrics to see how you're doing and identify areas for improvement. Always, if you have a question, don't hesitate to ask your partner account manager.

SmartWay: You are part of a Global Movement –

<on screen: map of world, with certain nations highlighted in green or blue>

Alright, “today U.S. and Canada, tomorrow the world” – “Green” are countries that are adopting part of the SmartWay program or have already been progressing. We’d like to see more “blue” *<like Canada, which has a full SmartWay program>* in the world as they adopt a program with more and more ability to help you with your sustainability progress. And I’ll leave you with this little thought: MIT has said that SmartWay is “the gold standard for freight carbon tools.” You know it’s not just us who are saying it. *They* think it. This is a valuable resource as well.

Alright, I’m sorry to have taken so long to go through this presentation. This is my first time delivering this presentation and I didn’t keep track of my time. For those who need to go, if you’ve asked a question, it will be handled; we’ll come back to you. For those that don’t have an appointment and wish to spend a little time just hearing the question and answers, you may stay on the line. In any case, if you have a question, it will be answered.

Mary: I’m going to ask right now that Tracie and Rick let me know if there’s some questions that we can handle now.

Tracie Jackson-Hall, EPA: Hi, can you hear me?

Mary: I can.

Tracie: Okay, most of the questions are specific things that I’m handling. A few people have asked where they can find the worksheet that you mentioned earlier. Those are located on the “We’re Partners” website: <http://www.epa.gov/smartway/forpartners/>. If you type that in, you’ll get a number of resources, including an example tool that’s already filled out that will allow you to play around with the numbers and get acquainted with the tool before you do your own. There’s also a number of worksheets that you can calculate various factors for your program again before you sit down with the tool and try to do data entry. Again that’s <http://www.epa.gov/smartway/forpartners/> --those resources are there.

There were a couple people who were asking when the tool will be available. It is available now. I just wanted to answer those questions. Given that we’re right at the 3:00 hour, I think we can take care of these last remaining questions internally. I’ll respond to those directly.

Mary: Okay, that sounds great.

SmartWay for Partners –

You may have noticed I just went to the website and showed people where those things that you were just referring to, those resources, can be found. Remember, you’re at the Truck Carriers tab on the For Partners’ page <http://www.epa.gov/smartway/forpartners/index.htm>.

Alright, with that and that promise to follow up on further questions, I would like to thank you again for your attendance at today’s webinar. We were glad to have you and we hope you found that it would be worthwhile. We look forward to hearing from you and seeing your tools come in. And as always, do make sure that you use the resource of your partner account managers. They are there for you if you need to know not only how to complete a tool, but what to do with that information that you invested into the tool in terms of how you can even improve your environmental performance, increase your efficiency, and save money. That’s the win, win again.

Okay, one more thing on the home page. If you forget how to contact us, go down to the bottom. “Contact Us” takes you to a page with a phone number, <734-214-4767>, or you have the SmartWay email box, *smartway_transport@epa.gov*, to ask your questions or request information. Alright, that’s it for us. Thanks again, everybody. Have a great day!

NOTE: < > indicates explanatory text or web links not stated in the presentation