Introducing the New SmartWay Online Truck Tool

For all Truck Carriers

Matthew Payne, January 27, 2022
The presentation slides will be shared after the webinar.

Today’s webinar is being recorded.

Submit a question or comment via the Q&A pane on your Zoom control panel.

After the presentation, as time permits, our EPA hosts and presenters will answer questions submitted via the Q&A box.

Please complete the survey at the end of today’s webinar.
www.epa.gov/smartway
# SmartWay Webinars & Events

EPA hosts free webinars to help you learn how to get the most out of the SmartWay Program.

**On this page:**
- [Upcoming Webinars](#)
- [Past Webinar Recordings](#)

## Register for Upcoming Webinars

- Participants must pre-register.
- Registration closes at 12:00 pm on the day of the webinar.
- Click the event name for a description and registration links.

### Event Type Legend

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
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<tbody>
<tr>
<td>Thursday, April 21,</td>
<td>Education</td>
<td>The Benefits of Freight Railroad Transportation Capacity, Safety &amp; Clean Air</td>
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<tr>
<td>2021</td>
<td></td>
<td></td>
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<tr>
<td>Wednesday, May 20,</td>
<td>Education</td>
<td>SmartWay's Strategies: Submitting Activity Data Gets You More Out of SmartWay</td>
</tr>
<tr>
<td>2021</td>
<td></td>
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</tr>
</tbody>
</table>

Have an idea for a webinar? [Email your idea](mailto:smartway_transport@epa.gov) with the subject line “SmartWay Webinar Suggestion.”

## Past Webinars

### Event Type Legend

<table>
<thead>
<tr>
<th>Webinar Type</th>
<th>Event Name</th>
<th>Primary Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freight</td>
<td>Alternative Fuel Adoption Accelerator: Discussion with Penske and CMA</td>
<td>All Partners, General Audience</td>
</tr>
<tr>
<td>Matters!</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

www.epa.gov/smartway/smartway-webinars-events
Covered Today

- Very Quick SmartWay Background
- Comprehensive Screen Capture Walkthrough and Discussion
- Live Demonstration
Background

- Partnership Program
- Jointly developed with the freight industry
- Goal: reduce emissions- CO2, NOx, PM
- Goal: Save Partners money through efficiency improvements
Tool Development Timeline

- Program development: 2001
- Program launch: 2004
- SmartWay 2.0 Tools (Excel): 2008
- SmartWay 3.0 Tools (Online)
  - Online Truck Tool: 2020
  - Online Shipper Tool: 2021
  - Online Logistics: Planned for 2022
Carriers Submit Data in SmartWay Tools

SmartWay QA/QCs the Data & Creates Metrics

SmartWay System Core Functionality

Common Metrics Accessed by Customers

Feedback Mechanism

Used in Global & Other National Reporting Systems

SmartWay’s Current 6 Emission Metrics

<table>
<thead>
<tr>
<th>Pollutant</th>
<th>Metric</th>
</tr>
</thead>
<tbody>
<tr>
<td>CO₂</td>
<td>g/ton-mile</td>
</tr>
<tr>
<td>NOₓ</td>
<td>g/ton-mile</td>
</tr>
<tr>
<td>PM</td>
<td>g/ton-mile</td>
</tr>
</tbody>
</table>

Carriers Submit Data in SmartWay Tools

SmartWay QA/QCs the Data & Creates Metrics

Common Metrics Accessed by Customers

Feedback Mechanism

Used in Global & Other National Reporting Systems
Changes due to going Online

- Submit online, not via email
- Submit via PC, Mac, or large screen tablet device
- Use any major web browser
- Saves data in your SmartWay partner portal
- Updates to Tools applied instantaneously

- More auto-populate options
- Real-time information on your carrier submittal status
- Easier data management
- Better Navigation
- Scalable to your screen size
Changes due to going Online

- No more Excel security setting issues
- No Excel version issues
- No dual .xls and .xml submission via email
- No more losing your SmartWay files
Getting Started

Log into your SmartWay partner portal by entering your SmartWay ID at https://app4.erg.com/smartwayweb/portal/login.cfm?language=ENG

If you don’t receive a login, then your email may be blocking our database messages so ask your PAM for a login.
SmartWay has a short form of the Truck Tool built for small carriers with non-complex fleets

- 20 Trucks or less
- Operates only One truck class  
  (e.g. only operates class 8B vehicles)
- Only uses diesel or gasoline fuel  
  (no alt fuels/EVs)
- Does not broker out loads
- Compatible with mobile phones, tablets, PCs
Starting in 2022, the SmartWay Tool will only be offered Online

No more MS Excel-based Truck Tools
Make sure you are completing the right Tool!
Experienced/New Users

SmartWay Online Truck Tool for All Carriers

Determine Assistance

Now, let's determine what level of assistance you need. You must select one of the options below in order to proceed.

- I've done this many times before, take me right to the data input.
- I would like to review the help screens before I start.
- Please contact me before I start.

[Buttons: Back, Continue, Help]
Easy Tool Navigation

SmartWay Online Truck Tool for All Carriers

Help screens

Select the underlined links on this page for details on tool input requirements, help and navigation features, and tool schedules. Selecting the top three links will display the information. You can select it again to hide it. The bottom two links will open new tabs in your browser. Close the new browser tabs or click on the SmartWay Online Truck Tool browser tab to return to this page.

If you do not have a PDF document viewer, you can go to the Adobe Reader Web site and download a free Adobe Reader for Windows, Macintosh, or UNIX systems. Note that there are other PDF viewers you can use instead.

- Gathering Your Data
- Tool Help and Navigation
- Schedule of Tool Due Dates
- Tool User Guide (PDF) (Opens in a new browser tab. To return to this page, simply close the new browser tab or click on the SmartWay Online Truck Tool browser tab.)
- EPA SmartWay Website (Opens in a new browser tab. To return to this page, simply close the new browser tab or click on the SmartWay Online Truck Tool browser tab.)

Accordian Structure, click and expand, click again and minimize
Additional Help

User Guide is a step-by-step instruction.

Technical Doc explains all inputs into the tool.

Located in your portal and on the SmartWay Website

https://www.epa.gov/smartway/smartway-truck-carrier-partner-resources
SmartWay Online Truck Tool for All Carriers

Home

Please complete each step in order. When a step is completed, the box next to it will be checked.

☐ Step 1: Partnership Agreement
☐ Step 2: Enter Company & Contact Information
☐ Step 3: Characterize your Fleet(s)
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☐ Step 7: Submit Your Information to EPA

Main Navigation
Screen
Proceed step-by-step
As you complete steps, a checkmark will appear indicating you have completed it
Click on any previously completed section to review it
The Partnership Agreement is unchanged from last year

It must be checked (accepted) to proceed further

Note: It is illegal to knowingly submit false information to the U.S. Government
Completing the Tool: General Dos and Don’ts

- The Tool generally saves as you proceed, however click Save and Continue to not lose your work on the current page.
- Do not cut and paste into the Tool. Sometimes you can copy unknown code that adversely impacts tool operation.
- Always check your inputs.
- For Company and Contact information, please make sure the information is correct and spelled correctly.
- Take advantage of all the built in QA/QC functions within the Tool.
Auto populate can save you a lot of time—just remember to review it!

Note: You can auto populate all your previously submitted contact information.

Accordion Structure, click and expand, click again and minimize.
You can Auto Populate (upload previous years data with one click) many sections of the tool saving you time and effort!

Look for the Auto Populate button!
Importance of Contact Information!

🔍 Your Partner name is used on our website
- **Please submit**: Joe's Trucking Company, LLC.
- **Not**: jooes TruckinG

🔍 Your Name is used in our mass communications
- **Please submit**: Joseph Testaverde
- **Not**: Joe T

🔍 Without proper information, your customers may not be able to identify you.

🔍 You will be contacted by your PAM and asked to correct & resubmit, as we cannot list your company without accurate information.
Returning partners can Auto Populate this section

Remember to review it carefully and make any needed updates
Importance of Fleet Information!

Your Shipper customers will look for your fleet name in their SmartWay Shipper Tool

Can be Auto Populated

Please review for accuracy

Create fleets as your customers can hire you. Example below:

- XYZ fleet has two business units that can be hired: XYZ Truckload, and XYZ Flatbed
- Good: XYZ Truckload, and XYZ Flatbed
- Bad: XYZ West Coast, XYZ Central, XYZ East Coast, XYZ Yard Hustlers, XYZ Best cherry-picked trucks fleet

Note: If your yard fleet cannot be hired separately, do not break it off into a separate fleet. Incorporate those trucks into your existing fleets as appropriate
Will be auto populated if you click the auto populate box on the prior screen

Make sure your SCAC, MCN and DOT numbers are accurate. Your customers search for you using this information!
Fleet Description continued

Will be auto populated if you click the auto populate box on the prior screen

Make sure your Fleet Description Results make sense to you. This is how you will be benchmarked

If you broker out loads you will need to complete the brokerage section (New this year)
More fleets are offering brokerage services

This freight must be captured and included

- Impacts emission rates
- Impacts Shippers

Option 1: Easy option- include your brokerage in your Truck Tool
- Assigns non-SmartWay emission factors to all brokered freight

Option 2: Complete a Truck Tool, mark your fleet internal, and then complete a Logistics Tool later in the year
SmartWay Online Truck Tool for All Carriers

Home

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   ☐ Lydia Transportation LLC: Lydia Refrigerated Fleet
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Return to the Home Screen

Note the boxes for the completed sections are now checked!
Fuel Types

SmartWay Online Truck Tool for All Carriers

You will have to complete an Activity screen for each fuel type checked.

Small numbers of Test trucks do not need to be included.

Example:

- **Do Not Include:** 2 low mileage Hybrid trucks used to test the viability of hybrid trucks in a fleet of 1000 trucks.
- **Include:** 20 CNG trucks in a fleet of 100 trucks.
Select (Check) each truck class that you operate

You can input Class 8B, 8A, 7, 6, 5, 4, 3, & 2B

This will populate screens in the Activity Data section for you to fill out per truck class

Please pay extra attention to 8B vs. 8A
Identify Model Years

Use the dropdown boxes to add your engine model years.
- You can select 2022 to 1998 or older.
- Enter your Truck Counts.
- It is OK to have empty Engine Model Year and Truck Count Rows.
- You may need to scroll down if you add a lot of rows.
Enter your Activity Data
Make sure to Validate your Data
Explain any Red or Yellow Alerts that signify an unusual data entry
Yellow and Red Alerts

While labelled errors, alerts may or may not be correct.

They are meant as a Quality Control feature for the benefit of the Partner.

Alerts are determined based on expected data generated by SmartWay tables of past partner inputs. Example: All MPG results from diesel 8B truckload dry van trucks in the past year (creates a nice bell curve actually).

Yellow Alerts are somewhat unusual (compared to the expected):
- Optional text explanation

Red Alerts are highly unusual (2+ Standard deviations from the mean):
- Require a text explanation (sufficient to explain the input to your SmartWay reviewer)

Boxes will be Red or Yellow in the tool denoting their status:
- Explained Reds will turn Yellow
Input your fuel
- Biodiesel is input on the Diesel Page
- Refrigerated Fuel only appears for Refrigerated Carriers
### Biodiesel

If your fleet uses biodiesel, enter the number of gallons used for each of the blends used by your fleet.

<table>
<thead>
<tr>
<th>Blend</th>
<th>Gallons</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Add Biodiesel row**

**Gallons of Biodiesel (All blends):**

**Weighted Average of Biodiesel Blends:**

**Gallons of B100 Equivalent:**

- **Select your blend using the dropdown**
- **Input your gallons**
- **Add rows for more blends**
- **The tool calculates B100 equivalents (used in emission calculations)**
Refrigerated Fuel

Refrigerated fuel can be directly input
Enter directly (if known)
Use default (if not known)
Payload can be entered directly
Or an industry default specific to the SmartWay category may be selected
- Very Low, Low, Average, High, Very High
Drive cycle inputs
- Urban v. Highway
- Urban Speeds
- Used to modify Class-Model Year
- NOx and PM emissions
**Idle information**

- **Long**
- **Short**

Primarily impacts your NOx and PM emissions

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**Average Annual Idle Hours per Truck**

Use this calculator to determine how much your trucks run at idle per year, on average.

- Enter the number of long and short duration idle hours your trucks run per day on average. (Long duration idle includes overnight, or continuous idle for longer than 60-minute intervals. Short duration idling includes idling at stop signs, in traffic, or short delivery stops.)
- Enter the average number of days per year that each truck is in service.
- The number of long duration idle hours per truck and the average number of days on the road cannot be zero.

<table>
<thead>
<tr>
<th></th>
<th>Class 8b</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Long Duration Idle Hours per Truck (overnight and longer than 60-minute intervals)*</td>
<td>1</td>
</tr>
<tr>
<td>Daily Short Duration Idle Hours per Truck (includes idling at stop signs, in traffic, and short delivery stops)*</td>
<td>0.5</td>
</tr>
<tr>
<td>Average Number of Days on the Road per Year*</td>
<td>325</td>
</tr>
<tr>
<td>Average Annual Idle Hours per Truck</td>
<td>488</td>
</tr>
</tbody>
</table>

**Validate**
Data Sources Description

- Simplified input from previous years
- Important to understand your inputs and tool
- Helps with QA/QC efforts
- Very useful if you hand off your work to a fellow employee
  - They will be able to complete the tool easier knowing your sources of information, contacts, etc
  - Also helps YOU remember next year
## Data Sources for Total Miles Driven

TMS data are collected for every trip with point to point mileage determined by GPS. The driver is required to key in start and end data for each trip into their handheld dispatch screen. For drivers that do not enter their data, a dispatch reconciliation process is conducted by the Dispatch Supervisor and keyed in before the trip is submitted for IFTA fuel tax calculations and payroll. Recorded start and end data are checked against driver logs on a trip-specific basis (by month) to ensure no mileage is missed. Total Mileage data from the two systems is reconciled to within a variance of less than 0.0005%.

## Data Sources for Fuel Used, including Biofuel and Reefer if applicable

All trucks are equipped with Qualcomm systems for electronic fuel/mileage reporting via the ECM. We run an annual report for the calendar year from our AS400 system where all data is recorded and maintained to report all mileages and fuel usage at the individual truck and trip level.

## Data Sources for Average Payload

We ran a detail revenue report including freight weights obtained from bills of lading, and our land analysis report (showing the precise number of loads over the calendar year). We then took the total weight for the year and divided by the total number of loads and converted to tons to calculate average payload per load.

## Other Data Sources

- Idle Hours: "We used our dispatch software to report the number of loads per day and over the year to estimate total idle time during truck wash/load/unload periods. We then adjusted the idle time estimates for use of customer pumps when unloading, and for facilities with "no idle" policies (where applicable), reducing idle time."
- Road Type/Speed Distributions: "Most of the loads in this fleet are hauled to facilities located outside urban cores, and directly off the highway or freeway. Using GPS records we determined that we drive approximately six "urban" (non-highway) miles for every load hauled by looking at the most common locations we load/unload.

☐ Apply these data sources to all of my fleets

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**Lydia Transportation LLC: Fleet 1**

Describe the Data Sources for this fleet in the spaces provided below. Make sure to describe sources for all fuel types as appropriate. Click on the (?) icons for detailed guidance on each Data Source Type.

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**SmartWay Online Truck Tool for All Carriers**
SmartWay Online Truck Tool for All Carriers

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✔ Lydia Transportation LLC: Lydia Refrigerated Fleet

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More progress—more checked boxes!
Report Viewing is Mandatory

SmartWay Online Truck Tool for All Carriers

Reports

Select a report by clicking on it's name.

In order to complete your tool, you must view each report.

- Fleet(s) Report - Please view this report
- Emissions Report - Please view this report
- Out of Range Report - Please view this report
- Public Disclosure Report - Please view this report

Open, view, and close each report to proceed

Review helps QA/QC efforts

Highlights useful information to partners who wouldn't normally voluntarily review
Printing Reports

SmartWay Online Truck Tool for All Carriers

Fleet(s) Report

Click: “Save as”
- Save to your desired location
Click “Print”
- You’ll see a preview and can print to your printer

Mouse Right Click

Click: “Save as”
- Save to your desired location

Click “Print”
- You’ll see a preview and can print to your printer
More Progress, almost done…

SmartWay Online Truck Tool for All Carriers

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Back  Close the Tool  Help
Important QA/QC Check!

SmartWay Online Truck Tool for All Carriers

Compare this year's information with last year's submission

In order to run a comparison report, you must have submitted a completed Truck Tool last year that was approved by your Partner Account Manager.

If you defined multiple fleets for either your current submission or previous submission, select which fleets you wish to compare. Then select the Run Report button in order to run the report.

<table>
<thead>
<tr>
<th>Data Year</th>
<th>Fleet</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021</td>
<td>Lydia Transportation LLC: Fleet 1</td>
</tr>
<tr>
<td>2020</td>
<td></td>
</tr>
</tbody>
</table>

**STEP 6: COMPARE TO PRIOR YEAR SUBMITTAL**

This screen provides a side-by-side comparison of the data entered for the current reporting year with that for the prior reporting year (if available). Changes in identification fields such as contact names, phone numbers, SCACs, etc. are flagged with an “X”. Changes in activity levels greater than 10 percent (Small Change) and 20 percent (Big Change) are flagged for attention. After reviewing you may return to prior screens to revise your fleet inputs if needed.

After reviewing the Comparison Report, return to the Home screen.

You do not have a previous year approved fleet, so you do not need to do this step. Please return to the Home screen and continue with Step 7.
Year-to-Year Comparison

- Very important for QA/QC, hence Mandatory viewing
- Different employees could fill out the Tool differently
  - Different sources
  - Better information
  - Varying levels of knowledge and proficiency
- Large Differences can be from
  - Changes in business
  - Tool was not completed properly LAST year
  - Tool was not completed properly THIS year
Submitting

SmartWay Online Truck Tool for All Carriers
Submit Your Information to EPA

By checking the box below, I declare that the information submitted via this Tool is, to the best of my knowledge, accurate. I understand that any person who, in the course of negotiating or performing under this Agreement, makes, presents or submits a false or misleading statement to the government, or any person who makes a material omission in the course of negotiating or performing under this Agreement, may be subject to liability under all applicable civil and criminal statutes including 18 U.S.C. 1001 (criminal liability for false statements), 31 U.S.C. 3801 - 3812 (civil liability for false statements) and 31 U.S.C. 3729-33 (The False Claims Act).

☐ I understand and agree to the terms of this agreement.

Submit

Submit your information electronically to SmartWay
You should get a confirmation email it was received (unless your security blocks it)
- Make epa.gov and erg.com a “trusted source” in your email system
Your PAM will review your Tool
What's Next?

- Your tool is saved
- You will be able to access it in your Partner Portal
- You will have access to all saved online tools in the future in your partner portal
The SmartWay Portal

The SmartWay Portal is a resource for SmartWay Partners and eligible companies that are interested in partnering up with SmartWay. The portal options that are listed below reflect what type of partner, prospect, or applicant you are (e.g., a Truck Carrier), as well as whether you are working with the US Environment Protection Agency or Natural Resources Canada. For example, partners can use this portal to obtain their SmartWay Registration document and SmartWay Logo files. If you have any questions, please contact your SmartWay Partner Account Manager or SmartWay recruiter.

Tools

- **SmartWay Online Truck Tool: Short Form**
  The Short Form version of the Online Truck Tool is for truck carriers who have a single fleet with 20 or fewer trucks that are all in the same class (e.g., 8b) and that only use diesel or gasoline fuel. You may choose to download the Excel-based tool from the SmartWay website instead of using this online version, or use the Online Truck Tool for All Carriers which you can access below. DO NOT complete more than one version of the Truck Tool.
  - Begin now
  - View previous submissions
  - Provide Feedback for the Online Truck Tool: Short Form (6 question survey)
  - User Guide for the SmartWay Online Truck Tool: Short Form
  - Technical Documentation for the SmartWay Online Truck: Short Form

- **SmartWay Online Truck Tool for All Carriers**
  The Online Truck Tool for All Carriers is the equivalent of the Excel-version of the SmartWay Truck Tool and may be used by any SmartWay Truck Carrier Partner. You may choose to download the Excel-based tool from the SmartWay website instead of using this online version. DO NOT complete more than one version of the Truck Tool.
  - Begin now
  - View previous submissions
  - Provide Feedback for the Online Truck Tool For All Carriers (10 question survey)
  - User Guide for the SmartWay Online Truck Tool for All Carriers
  - Technical Documentation for the SmartWay Online Truck for All Carriers

Survey!

Please fill out the Survey in the Partner Portal
10 Question Survey

- 9 “Checkbox” Questions
- 1 Open Ended Question

Please complete this as it is an important diagnostic tool for SmartWay

Use Question 10 for any suggestions!
Registration Documents

Available in the SmartWay Partner Portal

SmartWay Registration Docs are for partners to display in their lobby, website, or advertisements.

To determine if a partner is up to date (has submitted) their SmartWay information

- They will appear in the Online Shipper Tool
- They will appear in the Carrier Data File at https://www.epa.gov/smartway/smartway-carrier-performance-ranking
Demonstration of the Actual Tool
Demonstration of the Actual Tool Concluded
THANK YOU for being a SmartWay Partner!

Please contact your PAM with any additional questions

Contact your PAM with any Questions as you fill out your tool.

Please send any general feedback or suggestions on the tool to:

Payne.matthew@epa.gov