

A-2025-3054280

DATE OF DEPOSIT

APR 8 2025

PA PUBLIC UTILITY COMMISSION  
SECRETARY'S BUREAU

I, TIERRA CARROLL, hereby state that the facts above set forth are true and correct to the best of my knowledge, information and belief, and that I expect to be able to prove the same at a hearing held in this matter. I understand that the statements herein are made subject to the penalties of 18 Pa.C.S. § 4904 (relating to unsworn falsification to authorities).

TIERRA CARROLL

4/3/2025

PUC A-2025-3054280 GREATER WORK TRANSIT SERVICES LLC

My services would include transportation between points in Philadelphia County via paratransit.

## DATE OF DEPOSIT

APR 8 2025

PA PUBLIC UTILITY COMMISSION  
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### Question 3

I, Tierra Carroll, have worked alongside a manager of a private transportation company in the Philadelphia area. This individual will also serve on my management team; her name is Megan Alvarez and she has fifteen(15) years in the industry. I have learned basic dispatch and Mediroutes system as well as saw day-to-day operations. I helped with problem solving, time discrepancies, and general tasks. I am currently looking into *more training with an online course for NREMT Providers. I am prepared to hire additional staff with prior employment at an NREMT company to assist with daily tasks and have my billing done privately.*

### Question 4

As stated in my application, my office is a secured location with computers, a phone, fax line, printer, scanner as well as a screen that will be attached to see driver location of my vehicle and be able to track and keep up with any changes that may occur during the day.

We plan to keep our trip sheets in a locked secure cabinet as well as in the computer on "Mediroutes", which is an online dispatching system that can provide each transport but include and not limited to : time, date, location, and signatures; these trips will also be downloaded on a drive as well as a usb.

We will be able to provide all the necessary information in case of a spot inspection.

Communication is received through telephone, text, or electronic devices as well as our online platform through Mediroutes.

Employee information and background checks will also be kept electronically as well as a locked secure file cabinet and available upon request if necessary.

### Question 5

#### DRIVER QUALIFICATIONS AND HIRING PREREQUISITES

SUMMARY:

The Paratransit Driver is responsible for the transportation of wheel chair and ambulatory patient

(s). The Paratransit Driver must comply with all state, local and company policies and procedures pursuant to his or her level of training. The Paratransit Driver must also comply with all state, local and Company policies and procedures regarding certifications.

- Project a professional image and attitude when dealing with patients, other agencies and fellow employees.
- Be familiar with company driving policies/standards and always drive in a safe and responsible manner.
- Adhere to Company dress code and personal appearance policies.
- Be familiar with safe lifting and moving techniques and be physically/mentally fit for the performance of job duties.
- Be familiar with all Company policies and procedures and any changes made to the same.
- Be familiar with Company management structure.
- Be familiar with all Company forms and their purposes.
- Demonstrate proper patient care documentation techniques and a working knowledge of all policies and forms as well as all required hardware and software programs.
- Assume responsibility for daily check of vehicle maintenance and mechanical Must inspect and report any vehicle damage or malfunction and check all fluid levels to insure they are replenished if necessary. Must refuel vehicle daily, noting vehicle number, mileage and driver assigned PIN on all transactions.
- Assume responsibility for cleanliness of vehicle cab and cleaning vehicle exterior in conjunction with partners on a daily basis.
- Have a working knowledge of the Company communications systems and communications, policies and procedures.
- Be familiar with and capable of navigating in all response areas of the Company.
- Be knowledgeable of major receiving hospital/facility locations and their capabilities.

- Know how to use "GPS" products to assist in navigating.
- Be willing and able to perform special duties as assigned.
- Including but not limited to the following examples:
  - Washing Vehicles (inside/outside)
  - Sweeping/Vacuuming (vehicle/building)
  - Removal of trash (vehicle/building)
  - Billing
- Driving Shuttle Programs
- Must report all incidents, accidents and problems to his/her immediate supervisor
- Be willing to work overtime as required

#### KNOWLEDGE, SKILLS, AND QUALIFICATIONS:

- The Paratransit Driver should have a high school education. Those with a GED equivalent will be considered.
- Must have a current, valid driver's license.
- Must be knowledgeable of safe moving and lifting techniques to ensure safety of self and others.
- Must be knowledgeable in the correct use of hydraulic wheelchair lift.
- Must be knowledgeable in the correct use of safety straps used in securing patients while in the vehicle.
- Must successfully complete the Company's probationary program.

a) Common or contract carriers, except for call or demand.

(1) A common or contract carrier may not permit a person to operate a vehicle in its authorized service until it has obtained and reviewed a driver history from the

appropriate agency of every state in which that person held a motor vehicle operator's license or permit during the preceding 3 years.

(2) Following receipt of the initial driver history report, a common or contract carrier shall, at least once every 12 months from the date of the last report, obtain a driver history for each driver operating under its authority from the appropriate agency of the state in which the driver held an operator's license during the time period. Compliance with this subsection does not relieve a common or contract carrier of the responsibility to ensure its drivers hold a current, valid driver's license.

(3) A copy of the driver history shall be maintained by the common or contract carrier for at

least 2 years.

(1) Prior to permitting a person to start employment, we shall obtain and review a driving history research report for the person from the Department of Transportation and other relevant sources. A person with more than three moving violations in the 3-year period prior to the check or a major violation in the 3-year period prior to the check will not be hired.

(2) One year after engaging a driver and every second year thereafter, the company will conduct the driving history check required under this subsection and verify that a driver continues to be eligible to be a driver.

(3) A copy of the driver history shall be maintained for at least 2 years.

Age restrictions.

(a) We may permit a person to operate a vehicle in its authorized service if that person is at least 23 years of age.

(1) The person shall be registered as a certified emergency medical services vehicle operator (EMSVO) with the Department of Health (Department).

(2) The person shall carry the Department-issued registration of their EMSVO certification on board while operating a paratransit vehicle under 28 Pa. Code § 1023.21(h) (relating to general rights and responsibilities).

(3) We will verify that the paratransit driver is in good standing with the Department and maintain records for 4 years to prove each person's EMSVO certificate registration. The records must be available for inspection by staff upon request.

(4) We shall keep reports of the following:

(i) an accident, regardless of the severity of the accident.

(ii) a driving-related violation such as a moving violation.

(iii) reckless driving.

(iv) driving under the influence of alcohol or drugs. AFTERCARE IS NOT PROVIDED. DRUG AND ALCOHOL SCREENING WILL BE PERFORM VIA LABCORP.

#### **Criminal Background**

**PRIOR TO PROVISIONAL OFFER OF EMPLOYMENT, THE PROSPECTIVE EMPLOYEE, OF WHOM, IS OF 23 YEARS OR OLDER MUST GO THROUGH THE FOLLOWING PRE-SCREENING PROCESS:**

**- MEDICHECK EXCLUSION LIST**

-NATIONAL BACKGROUND CHECK(IF HAVE NOT LIVED IN PA FOR REQUIRED TIME)

-CHILD ABUSE CLEARANCE

-DRIVING RECORD

After hire, employees will be screened on a monthly basis to ensure they do not appear on exclusion list for Medicare, Medicaid, or any other federal health plan program. If determined, they appear on this list, or do not pass background check and/or any other clearance, the person will be terminated from their position within thirty(30) days.

We will perform self-audits on a quarterly basis to ensure proper handling and to comply with regulations as per Policy.

Question 6

I plan to start with 2 vehicles as they will help my company be able to contract thru managed Care Organizations as well as brokers.

Question 7

I will reattach my daily vehicle inspection list.

My current periodic maintenance plan is as follows:

Preventive maintenance inspections and Scheduled services are performed, monthly, and documented according to a proper schedule. All documentation including maintenance forms, logs, receipts, inspections, and trip logs will be kept through the life of the vehicle plus 3 years. Whenever a mechanic or tow truck is dispatched to a vehicle in service, documentation will placed in the vehicle file.

Management is responsible for maintaining the vehicle documentation.

Preventive maintenance inspections are basic inspections to help provide an opportunity to detect and repair damage or wear conditions before major components need repairs.

These inspections generally cover:

All fluids, interior and exterior components of the vehicle as explained on the daily inspection

checksheet

Record repairs and the routine application of fluids

Indicate inspection interval (i.e., daily or weekly); and mileage

Indicate if repair/replacement needed for an item.

#### IDENTIFIED DEFECTS

Identified defects should be reported to Management. Defects must be reviewed and repaired based on the categories listed:

#### SAFETY DEFECT

The vehicle cannot be released until the repairs are completed, except in case of an emergency. Safety cannot be compromised.

#### MECHANICAL DEFECT

A defect that will worsen and increase cost. The vehicle cannot be released until the repairs are completed, except in case of an emergency.

#### ELECTIVE MECHANICAL DEFECT

A defect that does not compromise safety will not cause further damage if operated but needs to be corrected prior to the next PM cycle. Repair should be scheduled. Due to transportation costs and disruption to operations, this decision should not be made lightly.

#### ELECTIVE OR COSMETIC DEFECT

The defect will not compromise safety and will not cause further damage or cost as it is an aesthetic defect. The vehicle should be scheduled for an off-peak time in the future, as determined by management, or at the next scheduled PM Service.

#### TYPES AND DESCRIPTIONS OF INSPECTIONS

The manufacturer's recommended service schedule should be adhered to by either mileage or months. Basic PM Services are 4 levels that are listed below:

(Note: See Manufacturer's Manual for mileage/month intervals)

Level A – Monthly. Change oil and filter, inspect tires, electrical system, service all fluid levels, lubricated chassis and doors, check A/C, hoses, fire extinguishers, belts, brakes, lights, test drive, body damage, etc. Inspect and test vehicle lift.

Level B – Monthly. Includes all items in level A.

Check coolant, specific gravity, and ph.

Level C – Conducted Monthly. All items in levels A and B, plus change fuel filter, replace air filter, and inspection of braking system.

Level D – Conducted Monthly. All items in levels A, B, and C, plus inspection and repack of wheel bearings.

Vehicles will be daily and monthly inspected as per the previous above statement to comply with applicable Pennsylvania vehicle equipment standards. If any vehicle is not in compliance, it will be removed until proper maintenance or adjustments are completed.

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# Paratransit Vehicle Inspection Guide

Date: \_\_\_\_\_ Operator: \_\_\_\_\_ Unit #: \_\_\_\_\_

## Pre-Trip Inspection

### Interior:

#### *Wheelchair Securement System*

- Check to assure all necessary straps are present, including a spare set
- Check straps for damage, wear, dirt, debris, and contamination
- Check ratchet straps for proper operation (self-adjusting or manual)
- Check hooks and buckles for cracks, unusual bends, and rust
- Check vehicle securement tracks for debris, damage, or rust

#### *Equipment*

- Proper securement of loose/spare equipment (oxygen, spare wheelchair)
- Safety equipment (first aid kit, traffic vest, cones, flares, fire extinguisher, etc.)
- Passenger comfort items (umbrella, poncho, blankets, etc.)

### **Exterior:**

- Check for proper tire inflation or tire damage.
- Check for body damage
- Check exterior lighting for proper function. Check lenses for cracks/clarity (All lighting to include high/low beam, turn signals, four way flashers, reverse, and brake lights)
- Check window glass for cracks/chips or obscured visibility

### **Lift System:**

#### ***Follow the manufacturer's recommended procedures***

- Check for damage, misaligned, or worn parts and hydraulic leaks
- Check door securement devices
- Check controller buttons and cables
- Operate lift (one complete cycle minimum) checking for smooth operation and speed
- Check lift lighting
- Traffic cones present to mark outside corners of lift deployment
- Check the roll stop plate for proper platform angle to ground
- Check for manual hand pump handle
- Check hand pump valve to assure it is properly closed

**Manual Ramp:**

- Check ramp for damage and proper stowage
- Traffic cones present to mark outside corners of ramp deployment
- Check for ease of operation
- Check proper angle to ground
- Check ramp surface (free from dirt and debris)
- Return ramp to stowed position (note excess noise or grinding)

**Please note any deficiencies:**

## STEPS TO OBTAINING COMMERCIAL AUTO INSURANCE

1. Commercial auto insurance is a contract between an insurance company and a business where the insurer agrees to protect the business financially should its vehicles get stolen, or involved in an accident. Minimum Age is 23 years old.

2. Commercial auto insurance quotes are only as good as the info you provide.

The basic details of all company vehicles, including make, model and year of manufacture

Expected annual mileage of each vehicle

How the vehicles are used.

Who will be transported by each vehicle (i.e. will it be just your employees or will there be other, non-employee passengers)

The ages of all drivers who will be using the vehicle(s)

A record of any existing/past company insurance

Your business address and where the vehicle(s) will be stored when not in use

The type of insurance coverage you need, including additional coverage you might want (i.e.

towing or roadside assistance)

Credit scores for all drivers of the vehicle

Accident records for all drivers of the vehicle

3. Be sure to find a licensed agent.

4. You Must Tell your agent all pertinent information. The amount of coverage you'll want in each aspect of the policy (e.g. collision, comprehensive, liability and uninsured/underinsured motorists)

The limit of what you're willing to pay out of pocket towards a deductible, should an accident occur Ask for and discuss any deals or incentive payment plans (i.e. discounts for paying annually vs. monthly)

Pick the best coverage for your business

ONCE COVERAGE WAS OBTAINED, IT IS IMPORTANT TO MAINTAIN TO  
HAVE THIS PUC AUTHORITY, AND TRANSPORT INDIVIDUALS. THE POLICY WILL  
BE KEPT  
CURRENT IN PAYMENTS.

QUOTES HAVE BEEN SENT OVER TO CARDIGAN INSURANCE AS WELL AS PA  
ASSIGNED RISK



PO Box 3107 • Mechanicsville, VA • 23103  
 navyfederal.org

*[Handwritten signature]*

Statement  
 Period  
 03/01/25 -  
 03/31/25

Access No. *[Redacted]*

Statement of Account

#BWNLLSV  
 #000000R0U7WQY7A4#000MMA00F  
 GREATER WORK TRANSIT LLC  
 6715 RISING SUN AVE  
 PHILADELPHIA PA 19111-4628

Routing Number: \_\_\_\_\_

Questions about this Statement?  
 Toll-free in the U.S. 1-888-842-6328  
 For toll-free numbers when overseas,  
 visit [navyfederal.org/overseas/](http://navyfederal.org/overseas/)  
 Collect internationally 1-703-255-8837

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 digital statements via Mobile or Navy  
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If you haven't already, go paperless! You can access up to 36 months of statements anytime, anywhere.  
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Insured by NCUA. \*Message and data rates may apply. Visit [navyfederal.org](http://navyfederal.org) for more information.

Summary of your deposit accounts

	Balance	Credits	Debits	Balance	Dividends
<b>Business Checking</b>					
<i>[Redacted]</i>		\$51,938.20	\$50,709.29	\$13,605.89	\$0.21
<b>Mbr Business Savings</b>	\$20,376.98	\$0.00	\$0.00	\$5.00	\$0.00
<i>[Redacted]</i>	\$5.00				
<b>Totals</b>	<b>\$20,381.98</b>	<b>\$51,938.20</b>	<b>\$50,709.29</b>	<b>\$13,610.89</b>	<b>\$0.21</b>
	Previous	Deposits/	Withdrawals/	Ending	YTD

Checking

Business Checking - *[Redacted]*

Date Transaction Detail

Amount(\$)

Balance(\$)

03-01 Beginning Balance

10,376.98

REMITTANCE RECEIVED AFTER STATEMENT PERIOD WILL APPEAR ON YOUR NEXT STATEMENT

GREATER WORK TRANSIT LLC

DEPOSIT VOUCHER



Statement Period  
03/01/25 - 03/31/25

Access No. ~~XXXXXXXXXX~~

PR

	Www.Amazon.CO WA	18.97-	10,358.01
	POS Debit- Business Debit Card 3032 02-28-25 Apple Cash Sent MO 1InfniteLoop		
03-03	CA	30.08-	10,321.93
	POS Debit - Business Debit Card 3032 Transaction 03-03-25 3281 Fox Street		
03-03	Philadelphla	56.00-	10,265.93
	POS Debit- Business Debit Card 3032 02-28-25 Amazon Mktpl* r8Kk Amzn.Com/Bill		
03-03	WA	69.64-	10,196.29
	POS Debit- Business Debit Card 3032 03-01-25 Apple Cash Sent MO 1InfniteLoop		
03-03	CA	427.04-	9,769.25
	POS Debit - Business Debit Card 3032 Transaction 03-01-25 Target T- 2250 Chemica		
03-03	Plymouth Meet	461.71-	9,307.54
	POS Debit- Business Debit Card 3032 03-02-25 Apple Cash Sent MO 1InfniteLoop		
03-03	CA	993.00	8,314.54
	eDeposit-Scan/Mobile 000000208912350	5,822.00	14,136.54
03-04	POS Debit - Business Debit Card 3032 Transaction 03-03-25 3281 Fox Street	3.00-	14,133.54
03-04	Philadelphia	5,000.00-	9,133.54
03-04	Transfer To Checking Tierra R Carroll		
03-05	POS Debit- Business Debit Card 3032 03-04-25 Dunkin #331956 Q35 Philadelphia	4.74-	9,128.80
	PA	68.22-	9,060.58
03-05	POS Debit- Business Debit Card 3032 03-04-25 Ic* Instacart*shop Instacart.Com CA	99.00-	8,961.58
03-05	POS Debit- Business Debit Card 3032 03-04-25 Unitedcreditadvlo 720-6211716 CO	91.24-	8,870.34
03-05	Paid To - Am Income Life Ins.Prem Chk 11190719	15.16-	8,855.18
03-07	POS Debit- Business Debit Card 3032 03-06-25 Khan's Gyro & Chlc Philadelphia PA	33.68-	8,821.50
03-07	POS Debit- Business Debit Card 3032 03-07-25 Ic* Instacart*shop Instacart.Com CA	46.50-	8,775.00
03-07	POS Debit- Business Debit Card 3032 03-06-25 Bob's House Of Cra Philadelphia PA		

**CHANGE OF ADDRESS**

PLEASE PRINT, USE BLUE OR BLACK BALL POINT PEN

NAME (FIRST)	MI	LAST	ACCOUNT NUMBERS AFFECTED
ADDRESS AND STREET			
CITY	STATE	ZIP CODE	
SIGNATURE OF NAVY FEDERAL MEMBER			
EFFECTIVE DATE (MO, DAY, YR)	HOME TELEPHONE NUMBER	DAYTIME TELEPHONE NUMBER	

Business Checking - ~~XXXXXXXXXX~~

(Continued from previous page)

Date	Transaction Detail	Amount(\$)	Balance(\$)
03-07	POS Debit - Business Debit Card 3032 Transaction 03-06-25 3281 Fox Street		



NAVY FEDERAL Credit Union

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navyfcu.com

Statement Period  
03/01/25 - 03/31/25

Access No. [REDACTED]

PR

03-07	Philadelphia	56.00-	8,719.00
03-07	POS Debit- Business Debit Card 3032 03-06-25 Ic* Instacart*shop	110.03-	8,608.97
03-07	Instacart.Com CA POS Debit- Business Debit Card 3032 03-06-25 Apple Cash		
03-07	Sent MO 1InfniteLoop	125.00-	8,483.97
	CA		
03-10	POS Debit- Business Debit Card 3032 03-06-25 Apple Cash Sent MO 1InfniteLoop	344.49-	8,139.48
03-10	CA	1.00-	8,138.48
03-10	ATM Fee - Withdrawal 03-07-25 P350000 Phila PA	101.95-	8,036.53
03-10	ATM Withdrawal 03-07-25 P350000 Phila PA	3.55-	8,032.98
03-10	POS Debit- Business Debit Card 3032 03-08-25 Ic* Instacart*shop Instacart.Com CA	16.86-	8,016.12
03-10	POS Debit- Business Debit Card 3032 03-08-25 Ic* Instacart*shop		
03-10	Instacart.Com CA POS Debit- Business Debit Card 3032 03-08-25 Dunkin	20.66	7,995.46
03-10	#351050 Q35 Philadelphia	24.00-	7,971.46
	PA		
03-10	POS Debit- Business Debit Card 3032 03-07-25 Sq * moonlight Corp	25.00-	7,946.46
03-10	Philadelphia PA POS Debit- Business Debit Card 3032 03-09-25 Apple Cash		
03-10	Sent MO 1InfniteLoop	30.00	7,916.46
03-10	CA	54.96-	7,861.50
03-10	POS Debit- Business Debit Card 3032 03-08-25 Apple Cash Sent MO 1InfniteLoop		
03-10	CA	57.21-	7,804.29
03-10	POS Debit- Business Debit Card 3032 03-07-25 Sherwin-Williams70	141.77-	7,662.52
03-10	Philadelphia PA POS Debit - Business Debit Card 3032 Transaction 03-07-25		
03-11	Wine And Spirits 5158 Philadelphia	357.44-	7,305.08
03-11	POS Debit- Business Debit Card 3032 03-08-25 Ic* Instacart*shop		
03-11	Instacart.Com CA POS Debit- Business Debit Card 3032 03-08-25 Apple Cash	11.65-	7,293.43
03-11	Sent MO 1InfniteLoop	27.52-	7,265.91
03-11	CA	91.91-	7,174.00
03-13	POS Debit- Business Debit Card 3032 03-10-25 Prime Video Channe Amzn.Com/Bill	32.18-	7,141.82
03-13	WA	136.50	7,005.32
03-14	POS Debit- Business Debit Card 3032 03-10-25 Khan's Gyro & Chic Philadelphia PA	15.16-	6,990.16
03-17	POS Debit- Business Debit Card 3032 03-10-25 Sp+aff * Jluxlabel 855-423-3729 CA	43.12	6,947.04
03-17	POS Debit- Business Debit Card 3032 03-12-25 Ic* Instacart*shop Instacart.Com CA	43.19-	6,903.85
03-17	POS Debit- Business Debit Card 3032 03-11-25 Tst*buccann Philadelphia PA	75.94-	6,827.91
03-18	POS Debit- Business Debit Card 3032 03-13-25 Khan's Gyro & Chic Philadelphia PA	16.34-	6,811.57
03-18	POS Debit- Business Debit Card 3032 03-14-25 City View Pizza II Philadelphia PA	70.08-	6,741.49
03-18	POS Debit- Business Debit Card 3032 03-15-25 Gamestop #1735	5,000.00-	1,741.49
03-18	Philadelphia PA POS Debit- Business Debit Card 3032 03-15-25 Apple Cash		
03-19	Sent MO 1InfniteLoop	328.52	2,070.01
03-19	CA	25,787.58	27,857.59
03-19	POS Debit- Business Debit Card 3032 03-18-25 Ic* Instacart*shop		
03-19	Instacart.Com CA POS Debit- Business Debit Card 3032 03-17-25 Ic*	24.86-	27,832.73
03-20	Instacart*shop Instacart.Com CA Transfer To Checking		
03-20	Tierra R Carroll	6.00-	27,826.73
03-20	Deposit - ACH Paid From Publichealth6 Paymentjnl 031925		
03-20	Deposit - ACH Paid From Publichealth6 Paymentjnl 031925	7.41-	27,819.32
03-20	POS Debit- Business Debit Card 3032 03-18-25 Dunkin #351050 Q35 Philadelphia	2,095.50-	25,723.82
03-21	PA	100.00-	



NAVY FEDERAL  
Credit Union

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navyfcu.org

Statement Period  
03/01/25 - 03/31/25

Access No. [REDACTED]

PR

03-21 POS Debit - Business Debit Card 3032 Transaction 03-20-25 3281 Fox Street Philadelphia	250.00-	25,623.82
POS Debit- Business Debit Card 3032 03-19-25 Amazon Prime*509C5 Amzn.Com/Bill WA		25,373.82
Paid To - Legacy Landmark Legacy Lan Chk 11100002		
POS Debit- Business Debit Card 3032 03-20-25 Cash App* tierra C* Oakland CA		
POS Debit- Business Debit Card 3032 03-20-25 Cash App* tierra C Oakland CA		

Business Checking - [REDACTED]

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PO Box 5533 • Mechanicsville VA • 22119-5533  
 Navy Federal Credit Union

Statement Period  
 03/01/25 - 03/31/25

Access No. [REDACTED]

P  
 PR

03-21	POS Debit- Business Debit Card 3032 03-20-25 Cash App*tierra C Oakland CA	500.00-	24,873.82
03-21	POS Debit- Business Debit Card 3032 03-20-25 Cash App*tierra C Oakland CA	1,600.00-	23,273.82
03-21	Paid To - Am Income Life Ins Prem Chk 11190719	156.53-	23,117.29
03-24	ATM Fee - Withdrawal 03-21-25 P350000 Phila PA	1.00-	23,116.29
03-24	ATM Withdrawal 03-21-25 P350000 Phila PA	101.95-	23,014.34
03-24	POS Debit- Business Debit Card 3032 03-21-25 Dunkin #331956 Q35 Philadelphia PA	4.20-	23,010.14
03-24	POS Debit- Business Debit Card 3032 03-21-25 McDonald's F23151 Philadelphia PA	4.74-	23,005.40
03-24	POS Debit- Business Debit Card 3032 03-21-25 Cash App*tierra C Oakland CA	10.00-	22,995.40
03-24	POS Debit- Business Debit Card 3032 03-23-25 Prime Video Channe Amzn.Com/Bill WA	11.65	22,983.75
03-24	POS Debit- Business Debit Card 3032 03-21-25 Etsy, Inc. Brooklyn	12.72-	22,971.03
03-24	Ny POS Debit- Business Debit Card 3032 03-22-25 Amazon Reta* 7F4K7 Wwww.Amazon.CO WA	18.97-	22,952.06
03-24	POS Debit- Business Debit Card 3032 03-20-25 Philly Gas Philadelphia PA	20.00-	22,932.06
03-24	POS Debit- Business Debit Card 3032 03-22-25 Ic* Instacart Instacart.Com CA	21.13-	22,910.93
03-24	POS Debit- Business Debit Card 3032 03-22-25 Ic* Instacart Instacart.Com CA	27.39	22,883.54
03-24	POS Debit- Business Debit Card 3032 03-21-25 Cash App*mora Bora Oakland CA	30.00-	22,853.54
03-24	Oakland CA POS Debit - Business Debit Card 3032 Transaction 03-21-25 3281 Fox Street Philadelphia	55.58-	22,797.96
03-24	POS Debit - Business Debit Card 3032 Transaction 03-22-25 Wine And Spirits 5174 Philadelphia	76.63-	22,721.33
03-24	POS Debit- Business Debit Card 3032 03-23-25 Cash App*tierra C Oakland CA	190.00-	22,531.33
03-24	POS Debit- Business Debit Card 3032 03-22-25 Apple Cash Sent MO 1Infinitemo CA	300.00-	22,231.33
03-24	POS Debit- Business Debit Card 3032 03-22-25 Apple Cash Sent MO 1Infinitemo CA	450.00-	21,781.33
03-24	POS Debit- Business Debit Card 3032 03-21-25 Apple Cash Sent MO 1Infinitemo CA	698.82-	21,082.51
03-24	POS Debit- Business Debit Card 3032 03-21-25 Apple Cash Sent MO 1Infinitemo CA	700.00-	20,382.51
03-24	POS Debit- Business Debit Card 3032 03-22-25 Apple Cash Sent MO 1Infinitemo CA	1,426.98-	18,955.53
03-24	POS Debit- Business Debit Card 3032 03-22-25 Apple Cash Sent MO 1Infinitemo CA	2,800.00-	16,155.53
03-24	POS Debit- Business Debit Card 3032 03-22-25 Cash App*tierra C Oakland CA	350.00-	15,805.53
03-24	Paid To - Three Insurance Three Insu Chk 9100001	925.00-	14,880.53
03-25	Paid To - Audi Fincl, Tel. Tel Debit Chk 2200002	6.35-	14,874.18
03-25	POS Debit- Business Debit Card 3032 03-25-25 Prime Video Channe Amzn.Com/Bill WA	9.00-	14,865.18
03-25	POS Debit - Business Debit Card 3032 Transaction 03-24-25 3281 Fox Street Philadelphia	100.00-	14,765.18
03-25	POS Debit- Business Debit Card 3032 03-24-25 Cash App*tierra C Oakland CA	324.54-	14,440.64
03-26	POS Debit- Business Debit Card 3032 03-24-25 Apple Cash Sent MO 1Infinitemo CA	10.02-	14,430.62
03-26	POS Debit- Business Debit Card 3032 03-25-25 Dunkin #331956 Q35 Philadelphia PA		



Credit Union

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Statement Period

03/01/25 - 03/31/25

Access No. [REDACTED]

PR

03-26	POS Debit - Business Debit Card 3032 03-25-25 Dunkin #332057 Q35 215-787-7667 PA	20.40-	14,404.22
03-26	POS Debit - Business Debit Card 3032 Transaction 03-25-25 3281 Fox Street Philadelphia	50.00-	14,354.22
03-27	POS Debit - Business Debit Card 3032 03-25-25 Sq *sweets & Treat Philadelphia PA	230.04-	14,124.18
	POS Debit - Business Debit Card 3032 03-26-25 T & H Grocery Stor Philadelphia PA	5.20-	14,118.98



PO Box 1700 - Mount Vernon, VA - 22119-5700  
Navy Federal CU

Statement Period  
03/01/25 - 03/31/25

Access No. ~~XXXXXXXXXX~~

PR

Date	Transaction Detail	Amount(\$)	Balance(\$)
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PO Box 3000 • Martinsburg, VA • 22110-3000  
 Member Since 1992

Statement Period  
 03/01/25 - 03/31/25

Access No. [REDACTED]

PA

Business Checking [REDACTED]

(Continued from previous page)

Date	Transaction Detail	Amount(\$)	Balance(\$)
03-27	POS Debit - Business Debit Card 3032 Transaction 03-26-25 Sunoco 03633807		
	Philadelphia	5.81-	14,113.17
	POS Debit - Business Debit Card 3032 Transaction 03-27-25 Target T- 456 N 5th St		
03-27	Philadelphia	11.73-	14,101.44
	POS Debit- Business Debit Card 3032 03-26-25 Dunkin #332057 Q35 215-787-7667		
03-27	PA	21.12-	14,080.32
	POS Debit- Business Debit Card 3032 03-27-25 Ic* Instacart*shop Instacart.Com CA	0.73-	14,079.59
03-28	POS Debit- Business Debit Card 3032 03-27-25 Kovocredit.Com Las Vegas NV	10.00-	14,069.59
03-28	POS Debit- Business Debit Card 3032 03-27-25 Ic* Instacart*shop Instacart.Com CA	26.20-	14,043.39
03-28	POS Debit- Business Debit Card 3032 03-30-25 Lyft Lyft.Com CA	37.14	14,006.25
03-31	POS Debit- Business Debit Card 3032 03-28-25 Cash App*tierra C Oakland CA	75.00-	13,931.25
03-31	POS Debit - Business Debit Card 3032 Transaction 03-29-25 Target T- 456 N 5th St		
03-31	Philadelphia	95.85-	13,835.40
	POS Debit- Business Debit Card 3032 03-28-25 Lowes #00907* 866-483-7521 NC	96.99-	13,738.41
03-31	POS Debit- Business Debit Card 3032 03-28-25 Cash App*tierra C Oakland CA	150.00-	13,588.41
03-31	POS Debit- Business Debit Card 3032 03-29-25 Lululemon Sagemore S	236.00-	13,352.41
03-31	Marlton NJ POS Debit- Business Debit Card 3032 03-30-25 Apple Cash Sent		
03-31	MO 1Infinetloop	283.16-	13,069.25
	CA	538.46-	12,530.79
03-31	POS Debit- Business Debit Card 3032 03-29-25 Coach 2459 Marlton NJ	925.00-	11,605.79
03-31	POS Debit- Business Debit Card 3032 03-29-25 Cash App*tierra C Oakland CA	0.10	11,605.89
03-31	Dividend		11,605.89
03-31	Ending Balance	<u>Amount(\$)</u> 91.24	<u>Date</u> 03-17
	Average Daily Balance - Current Cycle:	2,095.50	03-17
	\$12,023.53	156.53	03-17

Statement Period  
03/01/25 - 03/31/25

Access No. ~~XXXXXXXXXX~~

PR

Items Paid		350.00	03-18	Item	Amount(\$)
<u>Date</u>	<u>Item</u>	975.00	03-18	POS	43.19
03-05	ACH	461.71	03-19	POS	75.94
03-20	ACH	993.00	03-20	POS	43.12
03-21	ACH	18.97	03-20	POS	16.34
03-24	ACH	36.08	03-21	POS	70.08
03-24	ACH	56.00	03-21	POS	24.86
03-03	POS	69.64	03-21	POS	6.00
03-03	POS	427.04	03-21	POS	7.41
03-03	POS	3.00	03-24	POS	1,600.00
03-03	POS	99.00	03-24	POS	100.00
03-03	POS	4.74	03-24	POS	250.00
03-03	POS	68.22	03-24	POS	500.00
03-03	POS	110.03	03-24	POS	10.00
03-04	POS	125.00	03-24	POS	11.65
03-05	POS	344.49	03-24	POS	12.72
03-05	POS	15.16	03-24	POS	18.97
03-05	POS	33.68	03-24	POS	20.00
03-05	POS	46.50	03-24	POS	21.13
03-07	POS	56.00	03-24	POS	27.39
03-07	POS	25.00	03-24	POS	30.00
03-07	POS	30.00	03-24	POS	55.58
03-07	POS	54.96	03-24	POS	76.63
03-07	POS	57.21	03-24	POS	190.00
03-07	POS	141.77	03-24	POS	300.00
03-07	POS	357.44	03-24	POS	450.00
03-10	POS	3.55	03-24	POS	698.82
03-10	POS	16.86	03-24	POS	700.00
03-10	POS	20.66	03-24	POS	1,426.98
03-10	POS	24.00	03-24	POS	2,800.00
03-10	POS	27.52	03-25	POS	4.20
03-10	POS	91.91	03-25	POS	4.74
03-10	POS	11.65	03-25	POS	6.35
03-10	POS	32.18	03-25	POS	9.00
03-10	POS	136.50	03-26	POS	100.00
03-10	POS	15.16	03-26	POS	324.54
03-10	POS		03-26	POS	10.02
03-11	POS		03-26	POS	26.40
03-11	POS			POS	50.00
03-11	POS			POS	230.04
03-13	POS			POS	
03-13	POS			POS	
03-14	POS			POS	

Items Paid

Date                      Item                      Amount(\$)

Statement Period  
03/01/25 - 03/31/25

Access No. [REDACTED]

PR

03-27	POS	5.20	
03-27	POS	5.81	
03-27	POS		
03-27	POS	11.73	
03-28	POS		
03-28	POS	21.12	
03-28	POS		0.73
03-31	POS		
03-31	POS	10.00	
		26.20	
		37.14	
		75.00	

Savings

Mbr Business Savings [REDACTED]

(Continued from previous page)

Date	Item	Amount(\$)	
03-31	POS	95.85	
03-31	POS 96.99		
	03-31	POS	150.00
03-31	POS	236.00	
03-31	POS	283.16	
03-31	POS	538.46	
03-31	POS 925.00		
	03-10	ATMO	101.95
03-24	ATMO	101.95	

Date	Transaction Detail	Amount(\$)	Balance(\$)
03-01	Beginning Balance		5.00
	No Transactions This Period		
03-31	Ending Balance		5.00

2024 Year to Date Federal Income Tax Information

SAVINGS DIVIDENDS	0.00	
CHECKING DIVIDENDS	0.54	FINANCE CHARGE CHECKING LOC 0.00

Disclosure Information

- The interest charge on the Checking Line of Credit advances begins to accrue on the date an advance is posted to your account and continues to accrue daily on the unpaid principal balance.
- We calculate the interest charge on your account by applying the daily periodic rate to the "daily balance" of your account for each day in the billing cycle. To get the "daily balance"

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PA PUBLIC UTILITY COMMISSION  
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