# Getting Started

with

# SmartBenefits®

SmartBenefits® Commuter Benefits & Official Travel

Transit

Transit Passes

Metro Parking

MetroAccess

Vanpools, MARC & MTA Commuter Bus, VRE

Washington Metropolitan Area Transit Authority

Office of Marketing & Advertising

600 Fifth Street, N W – Room 6G

Washington, DC  20001

wmata.com

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metro

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## Helpful Tips

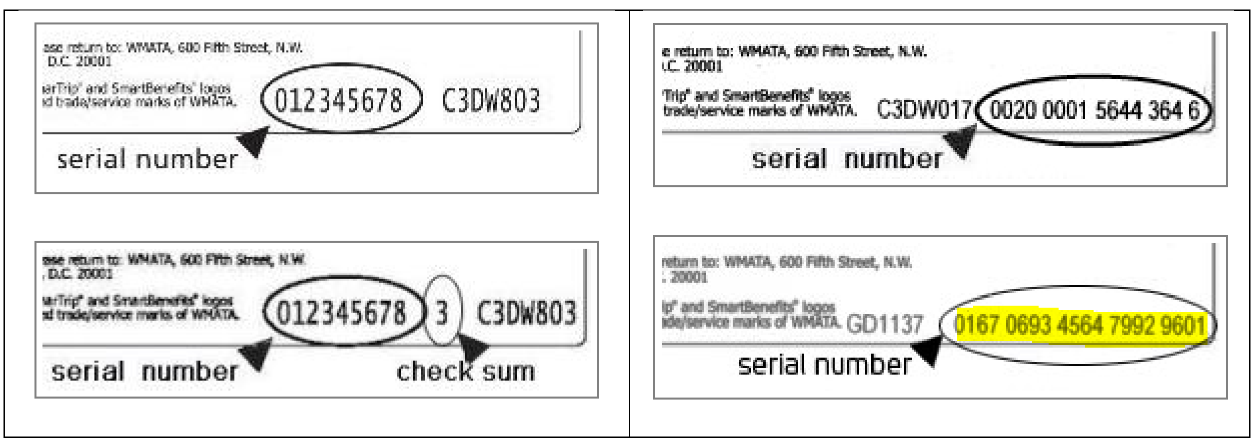
- Invest a few minutes and watch our training videos. Also, keep an eye on our home page for training webinar and seminar announcements.
- Use the Monthly Checklist tab on the SmartBenefits® Transit Benefits Program landing page to check your order each month. *Your order deadline is 11:59pm ET on either the 15th or 21st of each month as indicated on your Current Order web page.*
- Create a Transit Pass benefit type to allow participants to purchase Metro passes with SmartBenefits. Metro's Monthly Unlimited Pass is popular. *However, do not use this benefit type for MARC, VRE, or MTA Commuter Bus.*
- The Primary Account Administrator is the only person that can view, add, modify and terminate sub-administrators for the account. This includes *resetting passwords for* sub-administrators if they are unable to take advantage of the Forgot My Password feature.
- Immediately notify your Metro account representative of any changes associated with your payment method: credit card, bank account, purchase order and contract.
- Consider opting in for SmartBenefits AnyTime to give you complete benefits flexibility.

**SmartBenefits® Benefit Types**

| | |
|---|---|
| **NON-ROLLOVER**<br>Transit; Parking & Transit Pass | Unused monthly benefits are credited back to the employer's account each month |
| **ROLLOVER**<br>Transit; Parking & Transit Pass | Unused monthly benefits accumulate from month-to-month in the participant's transit, parking, and/or transit pass account. |
| **OFFICIAL TRAVEL** | Sends value directly to the after-tax stored value purse on a SmarTrip card. Not eligible for commuter benefit tax treatment. |

**SmarTrip® Card Serial Number Format**

The serial numbers are on the bottom right hand corner on the back of each card. There are four types of SmarTrip® cards. The most common starts with 0167 (highlighted below). You enter card serial numbers without spaces during the Add Employee process.



## PROGRAM MANAGEMENT

You use SmartBenefits to:

- Assign value to SmarTrip® cards for use on Metrorail; Metrobus; participating regional bus systems, and Metro parking fees.
- Pay for travel on systems that do not accept SmarTrip cards such as registered vanpools; MARC, VRE & MTA Commuter Bus via Commuter Direct; and MetroAccess.
- Cover official travel costs for employees.

You use Program Management configure SmartBenefits® to satisfy those needs. To start:

1. On the top menu bar, click *Program Mgmt* to reveal the sub-menu.
2. Click on a sub-menu item to access the features described below.

### BENEFIT CATEGORY

*This function cannot be used between after your order deadline and the last day of the month.*
The features below are hidden or disabled during that time.

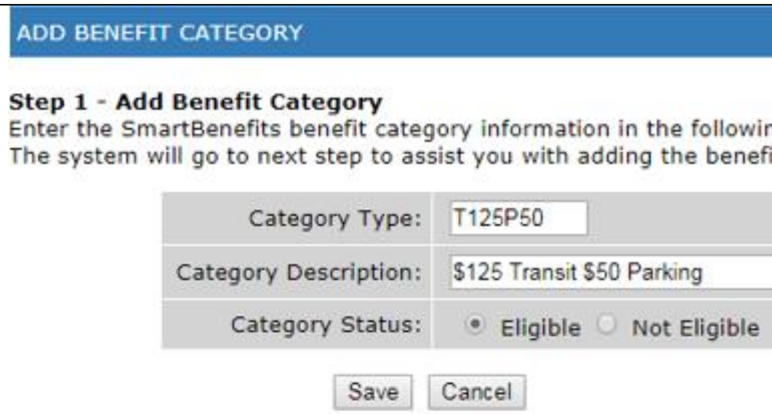
To deliver SmartBenefits each month to your participants, you must first create benefit categories and then assign each participant's SmarTrip card to one using either the Add Employee or the Self-Service process. You may want to survey your participants to learn what their monthly transit and Metro parking needs are before creating your benefit categories. Benefit categories can consist of one or more benefit types. For example, a benefit category might be set-up with these benefit types and amounts: $50 transit rollover, $100 transit pass rollover, and $100 parking rollover.

To create a benefit category, follow these steps (also, see the example on the next page):

1. Click *Program Mgmt*, then click *Benefit Category*
2. Click the *New Benefit Category* button. The Step-1 Add Benefit Category box will appear.
3. Click on each blank field and enter the appropriate information. Note:
    a. Use up to seven characters to describe the 'Category Type' (this short description will appear on other screens and reports and cannot be edited once saved);
    b. Leave the Category Status as Eligible.
4. Click *Save*. The Step 2 - Define the Benefit Amount page will appear.
5. Select the Benefit Type from the dropdown list. (See page 3 for definitions.)
6. Enter the monthly benefit amount. The range is 1 to 999 and must be in dollar increments with no cents. For example, enter 255 <u>not</u> 255.00.
7. Click *Save*.
8. "BENEFIT AMOUNT HAS BEEN CREATED SUCCESSFULLY" is displayed. Click *Save* to create an additional Benefit Type and Benefit Amount for that category or click *Finished*.
9. Repeat the process to create more Benefit Categories.

**Example:** Add a Benefit Category with $125 Transit Non-Rollover & $50 Parking Rollover

**Step 1 - Add Benefit Category**

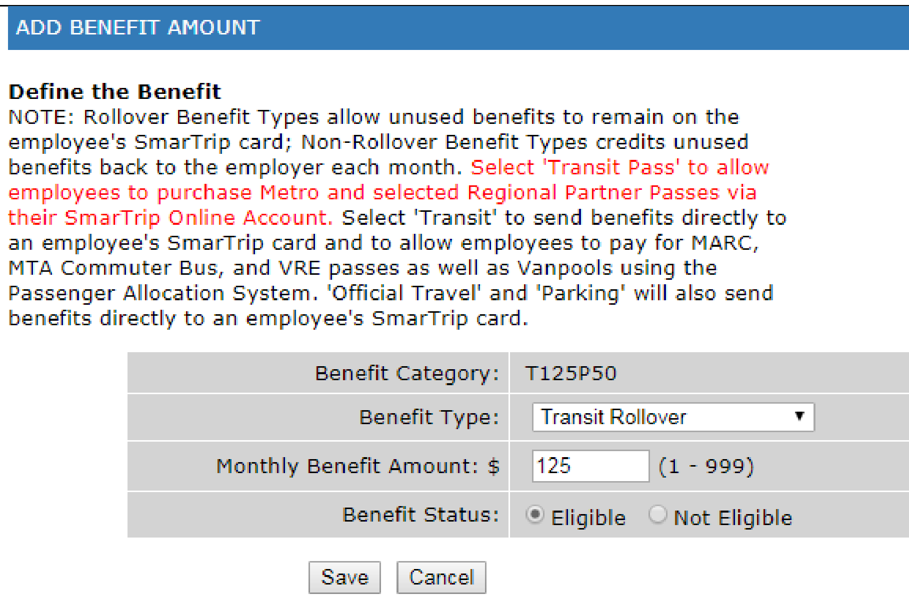

ADD BENEFIT CATEGORY

**Step 1 - Add Benefit Category**
Enter the SmartBenefits benefit category information in the followin
The system will go to next step to assist you with adding the benefi

| | |
|---|---|
| Category Type: | T125P50 |
| Category Description: | $125 Transit $50 Parking |
| Category Status: | Eligible / Not Eligible |

Save Cancel

**Step 2 - Define Transit Benefit Type and Amount**

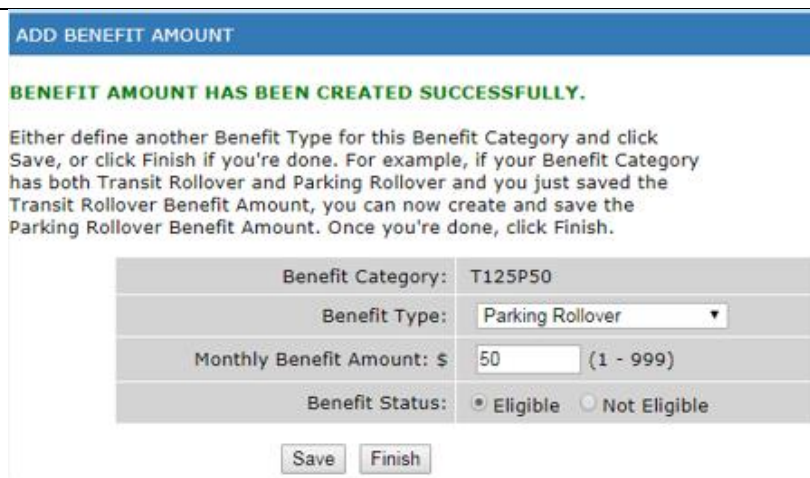

ADD BENEFIT AMOUNT

**Define the Benefit**
NOTE: Rollover Benefit Types allow unused benefits to remain on the employee's SmarTrip card; Non-Rollover Benefit Types credits unused benefits back to the employer each month. Select 'Transit Pass' to allow employees to purchase Metro and selected Regional Partner Passes via their SmarTrip Online Account. Select 'Transit' to send benefits directly to an employee's SmarTrip card and to allow employees to pay for MARC, MTA Commuter Bus, and VRE passes as well as Vanpools using the Passenger Allocation System. 'Official Travel' and 'Parking' will also send benefits directly to an employee's SmarTrip card.

| | |
|---|---|
| Benefit Category: | T125P50 |
| Benefit Type: | Transit Rollover |
| Monthly Benefit Amount: $ | 125 (1 - 999) |
| Benefit Status: | Eligible / Not Eligible |

Save Cancel

**Step 3 – Step 2 Success & Define Parking Benefit Type & Amount**


ADD BENEFIT AMOUNT

**BENEFIT AMOUNT HAS BEEN CREATED SUCCESSFULLY.**

Either define another Benefit Type for this Benefit Category and click Save, or click Finish if you're done. For example, if your Benefit Category has both Transit Rollover and Parking Rollover and you just saved the Transit Rollover Benefit Amount, you can now create and save the Parking Rollover Benefit Amount. Once you're done, click Finish.

| | |
|---|---|
| Benefit Category: | T125P50 |
| Benefit Type: | Parking Rollover |
| Monthly Benefit Amount: $ | 50 (1 - 999) |
| Benefit Status: | Eligible / Not Eligible |

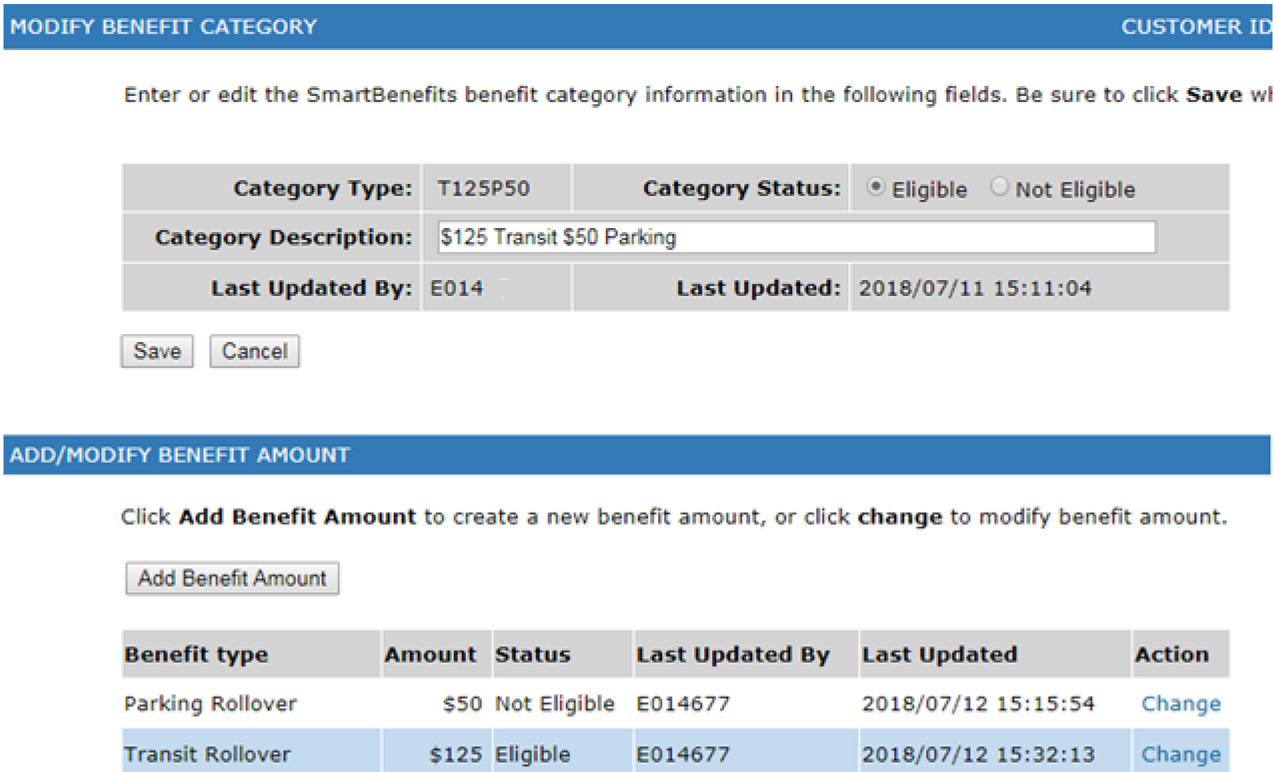
Save Finish

In Step 2, the $125 Transit Rollover Benefit Type was created for T125P50 when Save was clicked as acknowledged by the BENEFIT AMOUNT HAS BEEN CREATED SUCCESFULLY message.

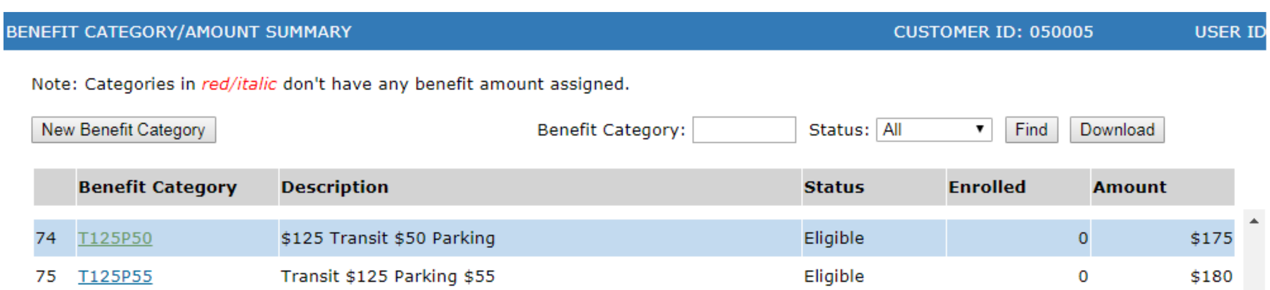
In Step 3, the $50 Parking Rollover was entered and saved to complete the T125P50 set-up.

After Saving the Parking Benefit Type, click *Finish*.

After clicking Finish, you'll see this screen.




Click *Cancel* to see the benefit category list with your new Benefit Category (Row 74 below). The Enrolled count is zero because no participants have been assigned to it yet. The $175 Amount is the total of the Eligible benefit types ($125 + $50 = $175).




***Tip***: You can create many combinations of Benefit Types and Amounts. Be careful to distinguish between Rollover and Non-Rollover.

***Tip***: If your participant wants to purchase a pass from Metro or one of Metro's regional bus partners, then select the 'Transit Pass' benefit type. Transit Pass benefits are allocated to your participants SmarTrip accounts and are credited against pass purchases. HOWEVER, select 'Transit' to apply benefits to travel on vanpools, MetroAccess, MARC, VRE, or MTA Commuter Bus and inform your participant to follow the instructions for the SmartBenefits Dashboard Transit Allocation feature described here.

***Tip***: Remember, Official Travel is added to a SmarTrip card's after-tax stored value purse. It remains there until used. Official Travel does *not* qualify for IRS commuter benefit treatment.

***Tip:*** If you no longer need a Benefit Category, then: 1) Verify that no participants are using that benefit, and 2) Mark the category Not Eligible. The Enroll column on the Benefit Category page shows how many participants are in each category. Click the link to identify those participants.

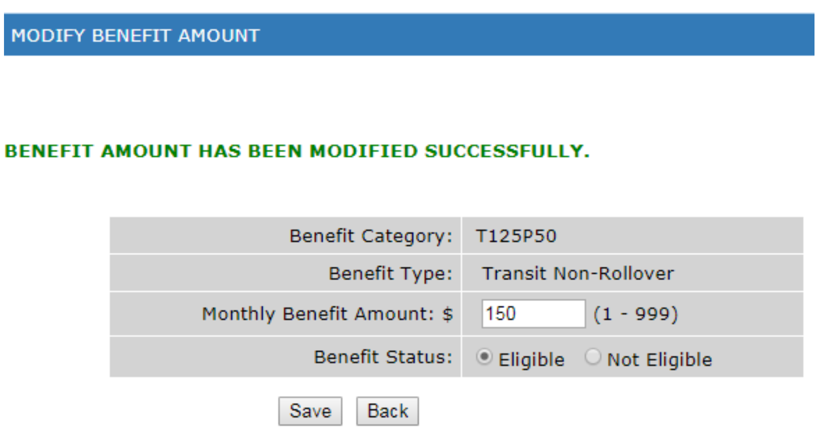
### To modify an existing Benefit Category or Benefit Type:

1. Click *Program Mgmt*, then *Benefit Category*
2. Click the *Benefit Category* link on the summary.
3. Options to modify the Benefit Category include:
   a. Changing the Category Status
   b. Editing the Category Description

   Click *Save* after making your changes. Reference the MODIFY BENEFIT CATEGORY screenshot on the prior page.
4. To modify an individual Benefit Type, click *Change*. Your options are to:
   a. Edit the amount
   b. Change the Status

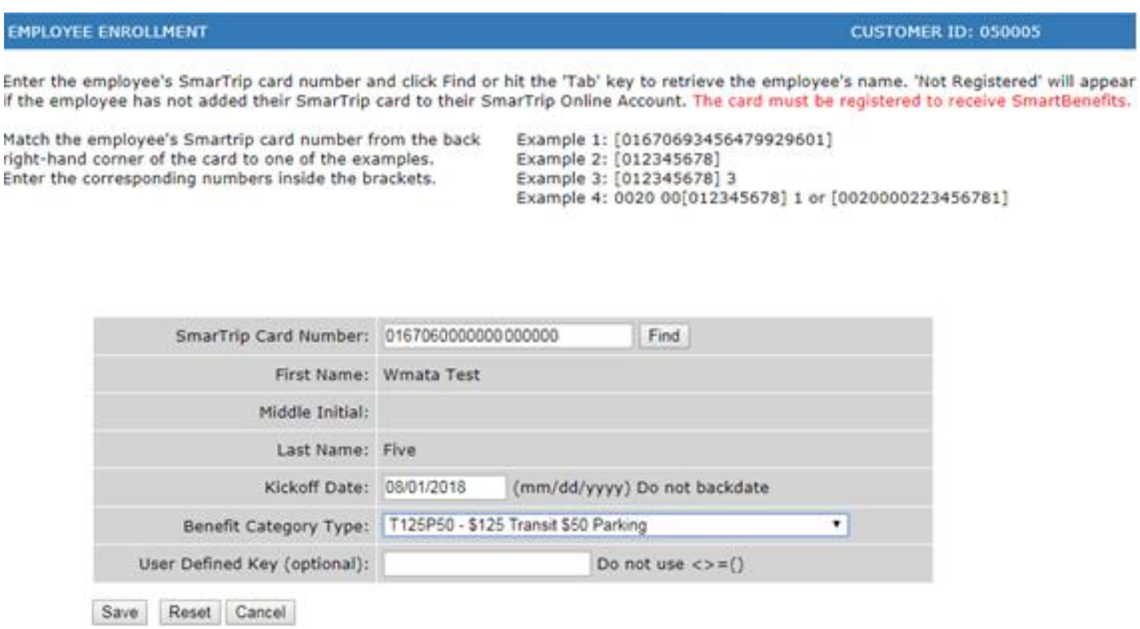
   Reference the ADD/MODIFY BENEFIT AMOUNT on the prior page for a sample screenshot.

   Once you click *Change*, you'll see a screen like one below where you can make and save your changes. Once saved, you'll receive a Benefit Amount Has Been Modified Successfully message. Click the *Back* button to return to the prior screen.



## ADD EMPLOYEE *(See the ENROLLMENT REQUESTS section for an easier way to add employees)*

1. Click *Add Employee*. The screenshot below is displayed.
2. Enter the participant's SmarTrip® card serial number *without any spaces*. (See the Helpful Tips for a graphic that identifies the serial numbers.)
3. Click *Find* or hit the Tab key.
    a. The participant's name is displayed if the SmarTrip® card is registered; otherwise Not Registered is displayed.
    b. *Although you can add an unregistered card, the card will not receive SmartBenefits until it is registered*. Unregistered cards are displayed with asterisks for the name. If you choose to add an unregistered card, you may want to type the participant's name in the User Defined Key box to remind yourself who the card belongs to. Participants can create a SmarTrip account and add (i.e., register) their cards at: https://smartrip.wmata.com/Account/Create
4. The Kickoff Date field is computed by the system. It is the earliest date that SmartBenefits can start for this participant. You may enter a later date, but you cannot enter an earlier date.
5. Select a Benefit Category Type from the dropdown list.
6. Optionally enter User Defined Key up to a 20-characters that will appear on SmartBenefits reports to help you manage your account.
7. Review your information. To erase the information and start over, click *Reset*.
8. Click *Save*. The message "THE EMPLOYEE HAS BEEN SUCCESSFULLY ADDED" is displayed in the lower portion of the screen.

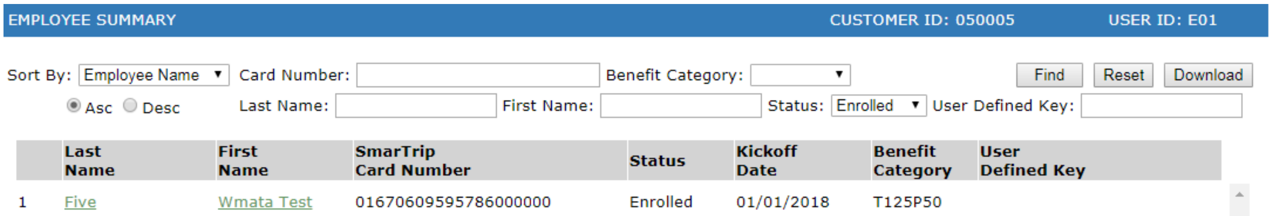



This card is registered because it returned a name.

You've selected the Benefit Category Type and are ready to click *Save*.

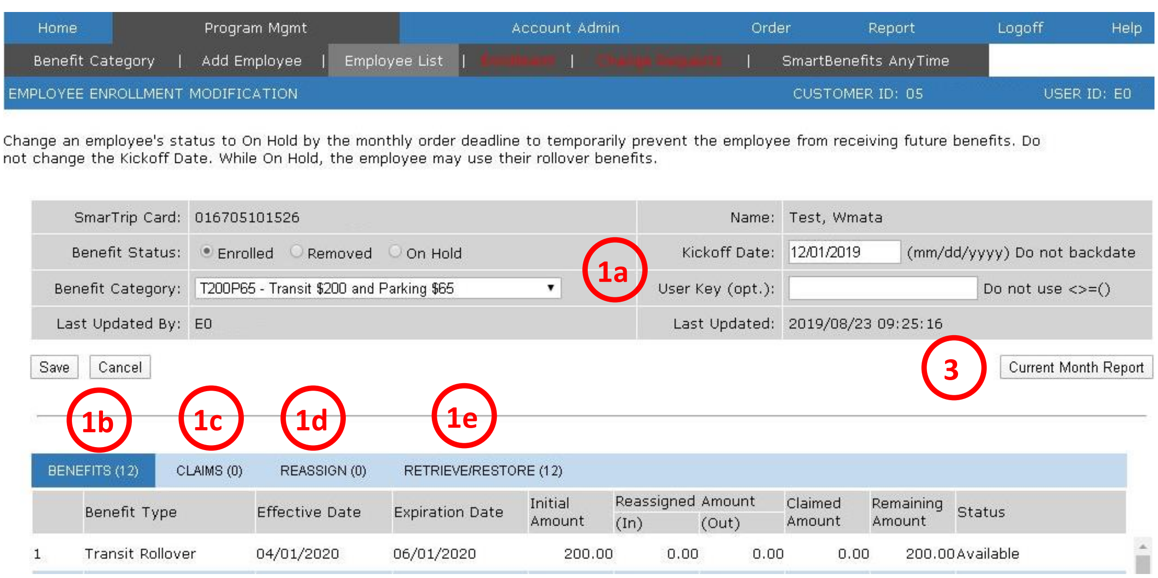
## EMPLOYEE LIST

This feature enables you to see all the SmartBenefits® information relating to each participant. You can sort, filter or download the information. Simply enter your criteria and click *Find*.




Click on an individual participant's name to open the Employee Enrollment Modification page.

1. The modification page allows you to:
   a. Make these changes to a participant *before* your order deadline:
      i. Benefit Status
      ii. Benefit Category
      iii. User Defined Key
   b. View assigned benefits
   c. View benefit claims (the six most recent uses of the benefits)
   d. Reassign benefits to a new card if the current card was lost or damaged (however, it's faster if participants do this themselves using their SmarTrip account)
   e. Retrieve or Restore benefits to a card
   f. View Benefits/Claim Activity for the current month
2. Click the *Benefits, Claims, Reassign, or Retrieve/Restore* tabs to toggle between them
3. Click the *Current Month Report* button to see benefits and claim activity from the first of the month to the current date
4. Click *Cancel* to return to the Employee Summary



### To permanently or temporarily prevent a participant from receiving benefits:

1. Click the appropriate Benefit Status by your order deadline.
2. Click *Save*

Choose:

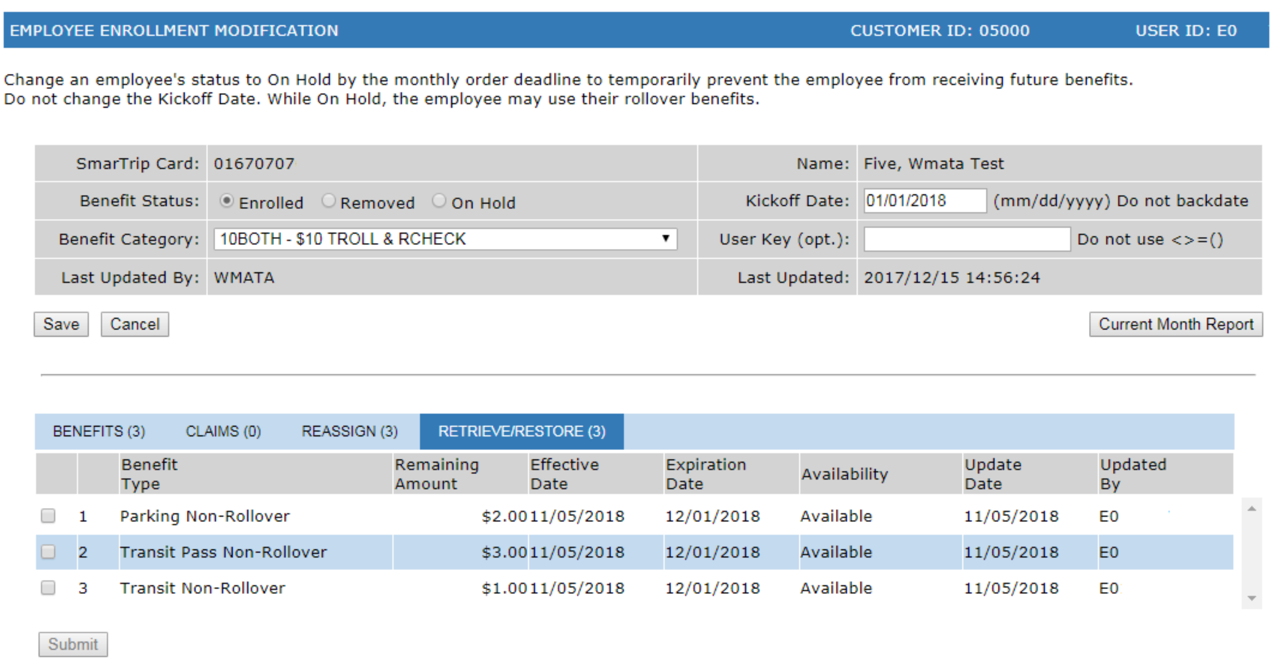
**Removed**: To *permanently* prevent future benefits from being loaded.

**On Hold**: To *temporarily* prevent a participant with *rollover* benefits from receiving additional monthly benefits. This status allows the participant to use their remaining rollover funds.

### To retrieve (take back) unexpired, unclaimed benefits that were previously delivered or to restore recently retrieved benefits:

1. Click *Program Mgmt*; then Employee List; then on a participant name to open the Employee Enrollment Modification screen.
2. Click the *Retrieve/Restore Tab*
3. Click the checkbox for an Available benefit you wish to retrieve. The Availability will change to Retrieve. (Click the checkbox of a Retrieved benefit to, and Available will display.)
4. Click *Submit*.
    a. You'll be taken to the first row of the benefits tab to see the retrieved or restored benefit.
    b. The screen will indicate EMPLOYEE RECORD HAS BEEN SUCESSFULLY MODIFIED
    c. On the Retrieve/Restore tab, the benefit's Availability will indicate Retrieved if the starting point was Available, and Available if the starting point was Retrieved.
5. Retrieved benefits will appear as a credit a future order.

<u>Starting Point</u>



Click the Checkbox to Mark the Benefit to Retrieve

BENEFITS (3) | CLAIMS (0) | REASSIGN (3) | RETRIEVE/RESTORE (3)

| | | Benefit Type | Remaining Amount | Effective Date | Expiration Date | Availability | Update Date | Updated By |
|---|---|---|---|---|---|---|---|---|
| ☐ | 1 | Parking Non-Rollover | $2.00 | 11/05/2018 | 12/01/2018 | Available | 11/05/2018 | E0 |
| ☑ | 2 | Transit Pass Non-Rollover | $3.00 | 11/05/2018 | 12/01/2018 | Retrieve | 11/05/2018 | E0 |
| ☐ | 3 | Transit Non-Rollover | $1.00 | 11/05/2018 | 12/01/2018 | Available | 11/05/2018 | E0 |

Submit **Click Submit to save your change.**

Click *Submit* to Retrieve the Benefit

You'll see this success message:

**EMPLOYEE RECORD HAS BEEN MODIFIED SUCCESSFULLY.**

The Benefit is listed as Retrieved on the Benefits tab.

BENEFITS (3) | CLAIMS (0) | REASSIGN (3) | RETRIEVE/RESTORE (3)

| | Benefit Type | Effective Date | Expiration Date | Initial Amount | Reassigned Amount (In) | Reassigned Amount (Out) | Claimed Amount | Remaining Amount | Status |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Transit Pass Non-Rollover | 11/05/2018 | 12/01/2018 | 3.00 | 3.00 | 0.00 | 0.00 | 3.00 | Reassigned (in) / Retrieved |
| 2 | Transit Non-Rollover | 11/05/2018 | 12/01/2018 | 1.00 | 1.00 | 0.00 | 0.00 | 1.00 | Reassigned (in) / Available |
| 3 | Parking Non-Rollover | 11/05/2018 | 12/01/2018 | 2.00 | 2.00 | 0.00 | 0.00 | 2.00 | Reassigned (in) / Available |

The Benefit is also listed as Retrieved on the Retrieve/Restore Tab

BENEFITS (3) | CLAIMS (0) | REASSIGN (3) | RETRIEVE/RESTORE (3)

| | | Benefit Type | Remaining Amount | Effective Date | Expiration Date | Availability | Update Date | Updated By |
|---|---|---|---|---|---|---|---|---|
| ☐ | 1 | Parking Non-Rollover | $2.00 | 11/05/2018 | 12/01/2018 | Available | 11/05/2018 | E0 |
| ☐ | 2 | Transit Pass Non-Rollover | $3.00 | 11/05/2018 | 12/01/2018 | Retrieved | 11/05/2018 | E0 |
| ☐ | 3 | Transit Non-Rollover | $1.00 | 11/05/2018 | 12/01/2018 | Available | 11/05/2018 | E0 |

Submit

Timing is important when you change a participant's benefit status and/or retrieve previously delivered benefits. These examples illustrate how you might respond to common situations:

***Example 1: Your employee terminated after your order deadline.***

- You may want to immediately **Retrieve** the remaining non-rollover benefits for the rest of current month.
- Log back in on either the 28$^{th}$, 29$^{th}$, 30$^{th}$ or 31$^{st}$ to **Retrieve** the former employee's benefits for the upcoming month.
- Once you're in the new month, log back in any time from 1$^{st}$ thru your order deadline to change the employee's Benefit Status to **Removed** to prevent the employee from receiving benefits going forward.

***Example 2: Your employee was terminated before your order deadline.***

- You may want to immediately retrieve the former employee's remaining non-rollover benefits for the current month.
- Change the employee's Benefit Status to **Removed** by your order deadline to prevent the employee from receiving future benefits. (If you missed the deadline, then follow the steps in Example 1.)

***Example 3: Your employee has a large rollover balance and asks you before your order deadline to temporarily stop his benefits until he uses his existing rollover balance.***

- Log in and change the employee's enrollment status to On Hold. This will prevent his benefit from being added to your upcoming month's order.
- If the employee opts to participate in the future, then the month before the employee wants to start, log in before your order deadline and change his status back to Enrolled.

## REASSIGN BENEFITS (from one card to another)

With one exception, unclaimed benefits will automatically be reassigned from a lost or damaged card to a replacement card if a participant follows the Report a Lost or Damaged Card process from the Card Summary page of their SmarTrip account. The replacement card will inherit the same benefit status and same benefit category as the lost card.

Here's the exception to this process: If a participant is due a refund for a pass on the lost/damaged card that was purchased with the transit pass benefit. In that case, the refund for that pass will be added to the lost/damaged card one to two days after the card was reported lost/damaged. Simply follow the Reassign Benefits Process below to transfer the value of the refund to the participant's replacement card.


BENEFITS (6) CLAIMS (1) REASSIGN (5) RETRIEVE/RESTORE (1)

| | Benefit Type | Effective Date | Expiration Date | Initial Amount | Reassigned Amount (In) | (Out) | Claimed Amount | Remaining Amount | Status |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Transit Pass Rollover | 02/13/2019 | 03/01/2019 | 17.50 | 0.00 | 0.00 | 0.00 | 17.50 | Pass refunded / Available |
| 2 | Official Travel | 02/08/2019 | 03/01/2019 | 5.00 | 5.00 | 5.00 | 0.00 | 0.00 | Reassigned (out) |

<u>Reassign Benefits Process for Registered Cards</u>

1. Click *Employee List*.
2. Click the participant's name.
3. Click *Reassign* on the Employee Enrollment Modification screen.
4. Enter the registered replacement card's SmarTrip card number.
5. Click *Continue*
6. If the information on the confirmation screen is correct, then click *Reassign Benefits*. If not, then click *Cancel*.
7. If you click *Reassign Benefits*, then a success message will confirm that the benefits have been reassigned to the new card. You can also confirm this by reviewing the Benefits tab.

The Benefits Status and Benefit Category on the new card will match the ‘From’ card.

The reassigned benefits are typically available for pick-up the next day. To complete the reassignment, your participant must tap their SmarTrip card to a SmarTrip target.

## SAMPLE REASSIGN SCREENS

<u>Enter the Registered Replacement Card’s SmarTrip Card #</u>

**EMPLOYEE ENROLLMENT MODIFICATION** CUSTOMER ID: 05000 USER ID: E0

Change an employee's status to On Hold by the monthly order deadline to temporarily prevent the employee from receiving future benefits.
Do not change the Kickoff Date. While On Hold, the employee may use their rollover benefits.

| | | | |
|---|---|---|---|
| SmarTrip Card: | 01670707 | Name: | Five, Wmata Test |
| Benefit Status: | Enrolled / Removed / On Hold | Kickoff Date: | 01/01/2018 (mm/dd/yyyy) Do not backdate |
| Benefit Category: | 10BOTH - $10 TROLL & RCHECK | User Key (opt.): | Do not use <>=() |
| Last Updated By: | WMATA | Last Updated: | 2017/12/15 14:56:24 |

Save Cancel Current Month Report

BENEFITS (3) CLAIMS (0) REASSIGN (3) RETRIEVE/RESTORE (3)

| | | Smartrip Card Number | Name | Amount | Updated Date | Updated By |
|---|---|---|---|---|---|---|
| 1 | From | | SmartBenefits AnyTime | 2.00 | 11/05/2018 13:48:03 | E0 |
| 2 | From | | SmartBenefits AnyTime | 1.00 | 11/05/2018 13:48:03 | E0 |
| 3 | From | | SmartBenefits AnyTime | 3.00 | 11/05/2018 13:48:03 | E0 |

Reassign Benefits to this Registered SmarTrip Card Number: 01671378 Continue

<u>Click *Continue* to Go to the Confirmation Screen</u>
(Note that the $3.00 above will *not* be reassigned because it was previously ‘Retrieved’)

**EMPLOYEE BENEFIT REASSIGN PROCESS** CUSTOMER ID: 050005 USER ID: E0

Use the employee benefit reassign process to transfer benefits from a lost or damaged SmarTrip card to a registered replacement card.

After clicking the Reassign Benefits button:
1) The 'To' card inherits the 'From' card's original benefit status (Enrolled, On Hold, or Removed) and is added to the employee list;
2) The 'From' card's benefit status becomes Removed.

The reassigned benefits are typically available for pick-up the next day. Your employee must tap their card to a SmarTrip target to retrieve them.

| | Smartrip Card Number | Cardholder Name |
|---|---|---|
| From: | 01670707 | Five, Wmata Test |
| To: | 01671378 | Five, Wmata Test |

Reassign Benefits Cancel

| | Benefit Type | Effective Date | Expiration Date | Initial Amount | Remaining Amount |
|---|---|---|---|---|---|
| 1 | Transit Non-Rollover | 11/05/2018 | 12/01/2018 | $1.00 | $1.00 |
| 2 | Parking Non-Rollover | 11/05/2018 | 12/01/2018 | $2.00 | $2.00 |

## Click *Reassign Benefits* to Complete the Process and Receive a Success Message

EMPLOYEE BENEFIT REASSIGN PROCESS — CUSTOMER ID: 05000 — USER ID: E0

Use the employee benefit reassign process to transfer benefits from a lost or damaged SmarTrip card to a registered replacement card.

After clicking the Reassign Benefits button:
1) The 'To' card inherits the 'From' card's original benefit status (Enrolled, On Hold, or Removed) and is added to the employee list;
2) The 'From' card's benefit status becomes Removed.

The reassigned benefits are typically available for pick-up the next day. Your employee must tap their card to a SmarTrip target to retrieve them.

| | Smartrip Card Number | Cardholder Name |
|---|---|---|
| From: | 01670707 | Five, Wmata Test |
| To: | 01671378 | Five, Wmata Test |

**Benefit reassignment completed successfully.**

The replacement card is now Enrolled (matches the lost or damaged card) with the same benefit category with the current benefits Reassigned (in). It will receive future benefits.

EMPLOYEE ENROLLMENT MODIFICATION — CUSTOMER ID: 05000 — USER ID: E0

Change an employee's status to On Hold by the monthly order deadline to temporarily prevent the employee from receiving future benefits.
Do not change the Kickoff Date. While On Hold, the employee may use their rollover benefits.

| | | | |
|---|---|---|---|
| SmarTrip Card: | 01671378 | Name: | Five, Wmata Test |
| Benefit Status: | (•) Enrolled ( ) Removed ( ) On Hold | Kickoff Date: | 01/01/2018 (mm/dd/yyyy) Do not backdate |
| Benefit Category: | 10BOTH - $10 TROLL & RCHECK | User Key (opt.): | Do not use <>=() |
| Last Updated By: | E0 | Last Updated: | 2018/11/05 15:02:01 |

Save Cancel Current Month Report

BENEFITS (3) CLAIMS (0) REASSIGN (3) RETRIEVE/RESTORE (2)

| | Benefit Type | Effective Date | Expiration Date | Initial Amount | Reassigned Amount (In) | Reassigned Amount (Out) | Claimed Amount | Remaining Amount | Status |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Parking Non-Rollover | 11/05/2018 | 12/01/2018 | 2.00 | 2.00 | 0.00 | 0.00 | 2.00 | Reassigned (in) / Available |
| 2 | Transit Non-Rollover | 11/05/2018 | 12/01/2018 | 1.00 | 1.00 | 0.00 | 0.00 | 1.00 | Reassigned (in) / Available |

The lost or damaged card is now Removed with the benefits Reassigned (out). It will *not* receive future benefits.

EMPLOYEE ENROLLMENT MODIFICATION — CUSTOMER ID: 05000 — USER ID: E0

Change an employee's status to On Hold by the monthly order deadline to temporarily prevent the employee from receiving future benefits.
Do not change the Kickoff Date. While On Hold, the employee may use their rollover benefits.

| | | | |
|---|---|---|---|
| SmarTrip Card: | 01670707 | Name: | Five, Wmata Test |
| Benefit Status: | ( ) Enrolled (•) Removed ( ) On Hold | Kickoff Date: | 01/01/2018 (mm/dd/yyyy) Do not backdate |
| Benefit Category: | 10BOTH - $10 TROLL & RCHECK | User Key (opt.): | Do not use <>=() |
| Last Updated By: | E0 | Last Updated: | 2018/11/05 15:02:01 |

Save Cancel Current Month Report

BENEFITS (3) CLAIMS (0) REASSIGN (3) RETRIEVE/RESTORE (1)

| | Benefit Type | Effective Date | Expiration Date | Initial Amount | Reassigned Amount (In) | Reassigned Amount (Out) | Claimed Amount | Remaining Amount | Status |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Parking Non-Rollover | 11/05/2018 | 12/01/2018 | 2.00 | 2.00 | 2.00 | 0.00 | 0.00 | Reassigned (out) |
| 2 | Transit Non-Rollover | 11/05/2018 | 12/01/2018 | 1.00 | 1.00 | 1.00 | 0.00 | 0.00 | Reassigned (out) |

## SELF-SERVICE ONLINE ENROLLMENT REQUESTS

Save time and let each new enrollee submit their SmartBenefits enrollment request via their SmarTrip account. With this feature, you can avoid keying in each enrollee's SmarTrip card number AND you're assured that your enrollee has registered their SmarTrip card (a requirement to receive SmartBenefits).

To take advantage of this feature, simply:

1. Educate your new enrollees
   a. Share your Organization Code with them
      (see the Account Administration/Self-Service section for more info)
   b. Ask them to sign into their SmarTrip account; click on the SmarTrip card they want to enroll; click *Join SmartBenefits*; and enter the organization code to start the process.
   c. Your enrollee's desired benefit request will be compared to your existing benefit categories. If a perfect match isn't found, then the participant will be presented with the closest options less than their request. (Alternatively, the enrollee can ask you to create a new benefit category to meet their need.)
   d. Your enrollee will receive an acknowledgement email when they submit their request as well as a notification email once you approve or reject their request. The email notes their "SmartBenefits enrollment date" (i.e., their kickoff date).
2. Use the Program Mgmt/Enrollments tab to approve or reject requests.
   a. You can do this at any time. The kickoff date will automatically update if you're past your order deadline and your new enrollee will be notified accordingly.
   b. You can add an optional user defined key to identify your enrollee with, for example, a department name or other identifier.
   c. The Monthly Benefit amount is displayed to let make it easier for you to update your payroll or other internal system to pay for the benefit. We've included an email address for the enrollee should you need to contact them.
   d. Click the checkbox to select an enrollee's request and then click *Enroll* or *Reject*. You'll receive a success message. (Enroll or reject several requests at once by clicking the checkbox to the left of Last Name.)
   e. Enrolled requests are immediately added to the Employee List. Rejected requests remain on the Enrollment Request List. Change the Status filter to Rejected to see them.

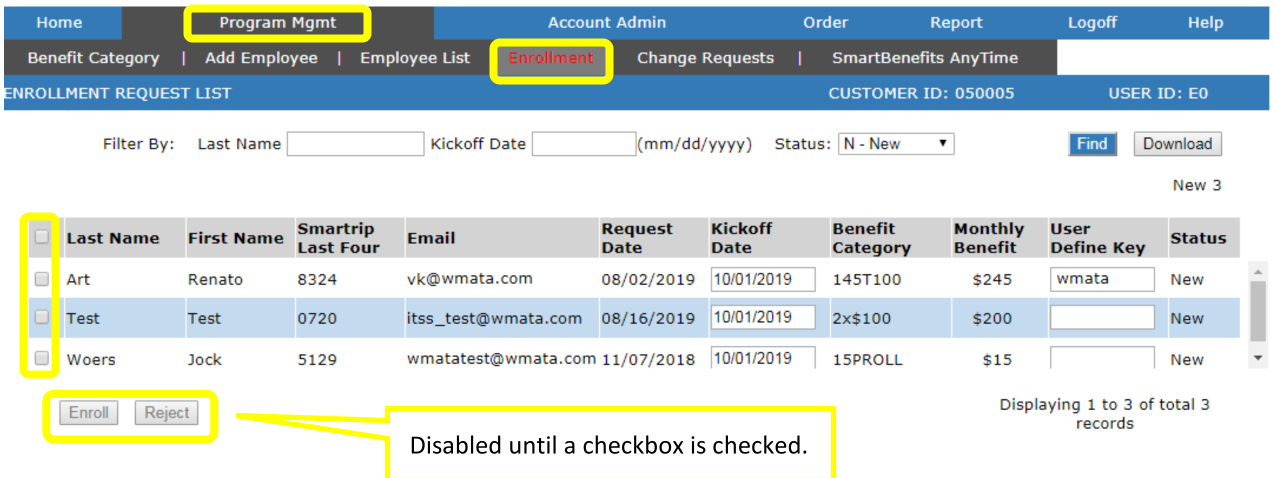
Request Notification

- The letters on the tab will turn red if you have a pending request at login. They revert to white after you've cleared all the requests and logged off.

- You will also receive a notification email up to three times before your *WMATA* order deadline if there are pending requests:  10-days prior; 5-days prior, and the day of.

Note:  You can take advantage the Self-Service Enrollment Requests feature even if you do not use the Self-Service Change Requests feature.

<u>Sample Enrollment Request Screenshot</u>




## SELF-SERVICE CHANGE REQUESTS

If your organization has opted-in for SmartBenefits Self-Service, then your participants may submit benefit status change requests and/or benefit category change requests electronically from the SmartBenefits Dashboard linked to their SmarTrip account.  (See the Account Administration/Self-Service section to learn about your Self-Service configuration options.)

We recommend that you check the Change Requests tab for pending requests each time you login to SmartBenefits.

- The letters on the tab will turn red if you have a pending request at login.  They revert to white after you've cleared all the requests and logged off.
- You will also receive a notification email up to three times before your *WMATA* order deadline if there are pending requests:  10-days prior; 5-days prior, and the day of.

Your participants may submit change requests at any time; however, you can only approve or reject the requests from the 1$^{st}$ of the month thru your order deadline.  They system automatically calculates an Earliest Effective Date based on your *WMATA* order deadline.  For example, if your deadline is the 15$^{th}$ of the month and a participant submits a request on the April 16$^{th}$, then the system will calculate a May 1$^{st}$ Earliest Effective Date.  If you do not act on the request by May 15$^{th}$, then the system will automatically set the Earliest Effective Date to June 1$^{st}$ and so on.

The same table is used to display both benefit status and benefit category change requests.

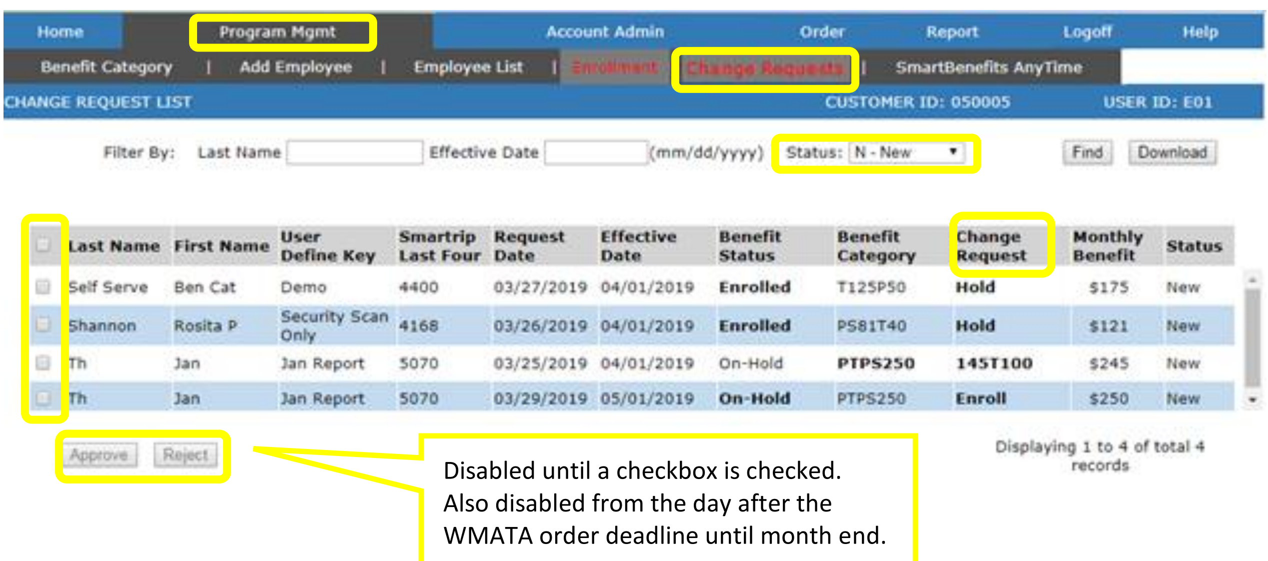
- The benefit status and benefit category columns display the *current* benefit status and category.
- The change request column displays the requested change.

- Monthly Benefit:
  - For benefit category changes, the total benefit for *requested* benefit category is displayed.
  - For benefit status changes, the total benefit for the *current* benefit category is displayed.

## Approve or Reject Change Requests.

1. Click on *Program Mgmt* then *Change Requests* before your order deadline. The Change Request page will display just New (pending) requests by default.
2. Select one or more New change requests (click the top checkbox if you want to select all requests). Once you select one, the Approve and Reject buttons are enabled.
3. Click *Approve* or *Reject*
   a. You'll be asked to confirm your decision. Click *OK*.
   b. You'll see a "Change Requests Processed Successfully" message.
   c. Approved changes are:
      i. Immediately applied to your Employee List and to your order.
      ii. Are removed from the Change Request page. (Tip: If you want to keep a history of the requests, use the Download button to download a .csv file before you take any actions.)
   d. Rejected changes are kept on the list. Filter on Rejected to see them.
   e. All changes are confirmed by a success message below 'Filter By:'.
   f. An email is automatically sent to your participant to notify him/her of your decision.

<u>Sample Change Requests Screenshots</u>



## SMARTBENEFITS ANYTIME (optional)

SmartBenefits® Anytime is an optional feature that lets you assign transit benefits directly to SmarTrip® cards anytime of the month. For example, it gives you the flexibility to assign benefits to a participant who may have started after the order deadline for the upcoming month.

SmartBenefits® AnyTime assignments are available for participants to pick up within four hours for Metrorail and within 24 hours for Metrobus and Metro's regional bus partners.

*Unassigned SmartBenefits® Anytime funds are available for use from month-to-month until they are depleted.*

### Participate in SmartBenefits® AnyTime

To participate in SmartBenefits® AnyTime, submit an order before your order deadline to create your 'pool' of SmartBenefits® AnyTime funds. Simply:

1. Click *Account Admin*, then *Modify Account*.
2. Click *Yes* for the SmartBenefits® AnyTime box and then Save (Screenshot #1). The SmartBenefits tab will be available the next time you log in.
3. Click *Program Mgmt*, then *SmartBenefits® Anytime* (Screenshot #2)
4. Add an Order Amount in whole dollars and click *Add*. The amount will appear along with a 'Current Month Order Has Been Updated Successfully' message (Screenshot #3)
5. Before the order deadline, you may enter a new order amount and click *Change* or click *Remove* to delete the order. (Screenshot #3)

#1

SmartBenefits® AnyTime Option: ◉ Yes ○ No

#2

SMARTBENEFITS ANYTIME SUMMARY CUSTOMER ID: 050005 USER ID:

| | Order Date | Order Amount | Used for Transit | Used for Parking | Used for Official Travel | Used for Transit Pass | Remaining Amount |
|---|---|---|---|---|---|---|---|
| 1 | 11/08/2017 | 25.00 | 9.00 | 3.00 | 0.00 | 0.00 | 13.00 |
| 2 | 06/22/2014 | 2,500.00 | 314.00 | 473.00 | 14.00 | 2.00 | 1,697.00 |
| 3 | 03/16/2012 | 2,500.00 | 1,600.00 | 790.00 | 0.00 | 110.00 | 0.00 |

**There is no Order Created for Current Month (July, 2018)**

Add Order Amount: $ [ ] Add

*SmartBenefits AnyTime Order Deadline: The 15th of each month at 11:59pm ET. Your order will be available on the 1st of the upcoming month

#3

SMARTBENEFITS ANYTIME SUMMARY CUSTOMER ID: 050005 USER ID:

| | Order Date | Order Amount | Used for Transit | Used for Parking | Used for Official Travel | Used for Transit Pass | Remaining Amount |
|---|---|---|---|---|---|---|---|
| 1 | 11/08/2017 | 25.00 | 9.00 | 3.00 | 0.00 | 0.00 | 13.00 |
| 2 | 06/22/2014 | 2,500.00 | 314.00 | 473.00 | 14.00 | 2.00 | 1,697.00 |
| 3 | 03/16/2012 | 2,500.00 | 1,600.00 | 790.00 | 0.00 | 110.00 | 0.00 |

**Current Month Order Amount(July, 2018) is $75**

Change Amount to: $ 75 Change

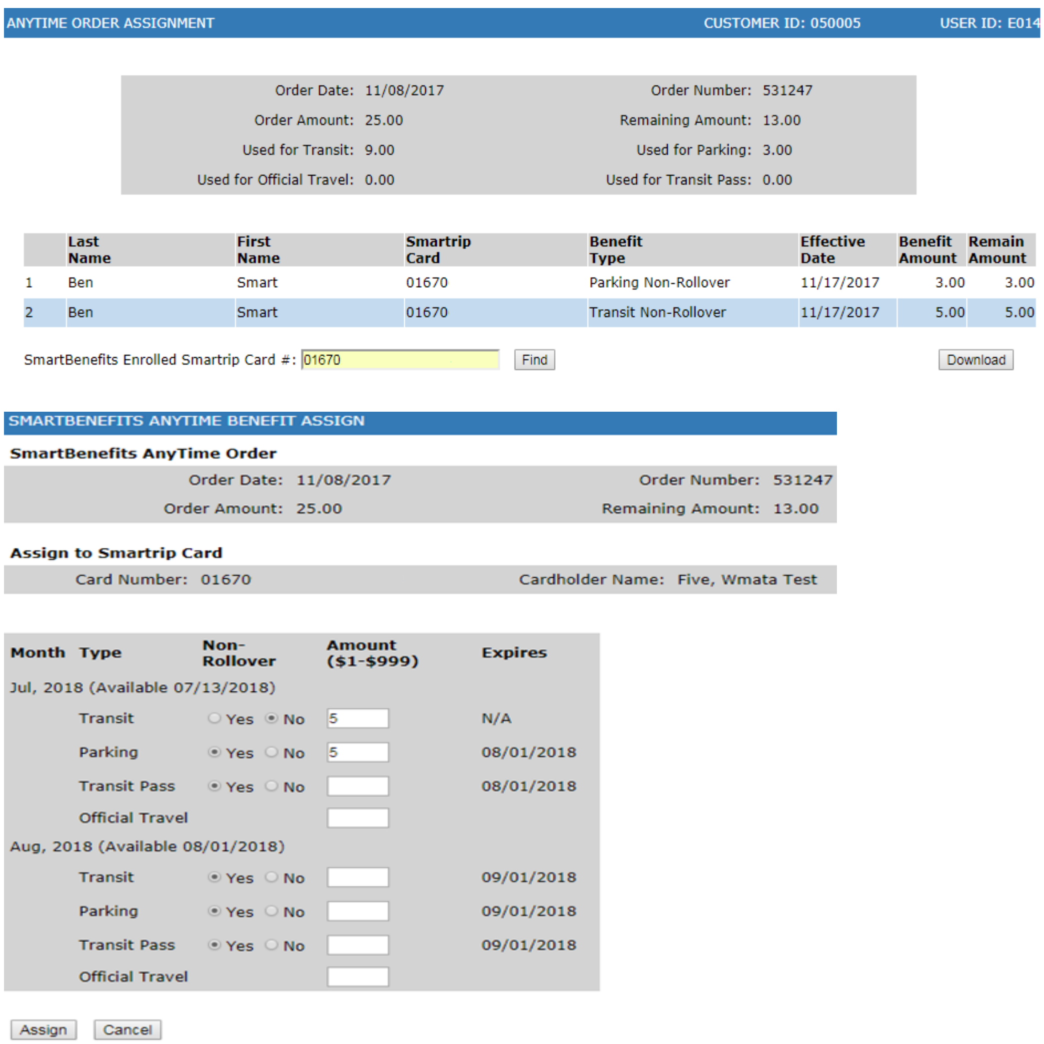
Or Remove All Remove

**Current Month Order Has Been Updated Successfully.**

## Assign or View SmartBenefits® AnyTime Funds

View your completed SmartBenefits® Anytime orders by clicking *Program Mgmt*, then *SmartBenefits® Anytime*. You will see Screenshot #2 above. Click the order date to:

- View or download SmartBenefits® AnyTime benefits assignment data for that order.
- Allocate benefits from that AnyTime order to a SmarTrip card enrolled in SmartBenefits.
  - Enter the SmarTrip card # and click *Find*
  - Allocate an amount to the desired Benefit Type(s) and month(s).
  - To assign the benefit as non-rollover (i.e., unclaimed funds are credited back to you), leave the default as Yes. To assign non-rollover funds, click *No*. (Note that the Expires date becomes N/A for if No is selected.)
  - Click *Assign*
  - You'll see AnyTime Benefits Assigned Successfully and the Remaining Amount for that order will decrease by the amount of the assignment.
  - Click *Cancel* to return to the AnyTime Order Assignment screen.



ANYTIME ORDER ASSIGNMENT CUSTOMER ID: 050005 USER ID: E014

| | |
|---|---|
| Order Date: 11/08/2017 | Order Number: 531247 |
| Order Amount: 25.00 | Remaining Amount: 13.00 |
| Used for Transit: 9.00 | Used for Parking: 3.00 |
| Used for Official Travel: 0.00 | Used for Transit Pass: 0.00 |

| | Last Name | First Name | Smartrip Card | Benefit Type | Effective Date | Benefit Amount | Remain Amount |
|---|---|---|---|---|---|---|---|
| 1 | Ben | Smart | 01670 | Parking Non-Rollover | 11/17/2017 | 3.00 | 3.00 |
| 2 | Ben | Smart | 01670 | Transit Non-Rollover | 11/17/2017 | 5.00 | 5.00 |

SmartBenefits Enrolled Smartrip Card #: 01670 Find Download

SMARTBENEFITS ANYTIME BENEFIT ASSIGN

**SmartBenefits AnyTime Order**

| | |
|---|---|
| Order Date: 11/08/2017 | Order Number: 531247 |
| Order Amount: 25.00 | Remaining Amount: 13.00 |

**Assign to Smartrip Card**

Card Number: 01670 Cardholder Name: Five, Wmata Test

| Month | Type | Non-Rollover | Amount ($1-$999) | Expires |
|---|---|---|---|---|
| Jul, 2018 (Available 07/13/2018) | | | | |
| | Transit | Yes No | 5 | N/A |
| | Parking | Yes No | 5 | 08/01/2018 |
| | Transit Pass | Yes No | | 08/01/2018 |
| | Official Travel | | | |
| Aug, 2018 (Available 08/01/2018) | | | | |
| | Transit | Yes No | | 09/01/2018 |
| | Parking | Yes No | | 09/01/2018 |
| | Transit Pass | Yes No | | 09/01/2018 |
| | Official Travel | | | |

Assign Cancel

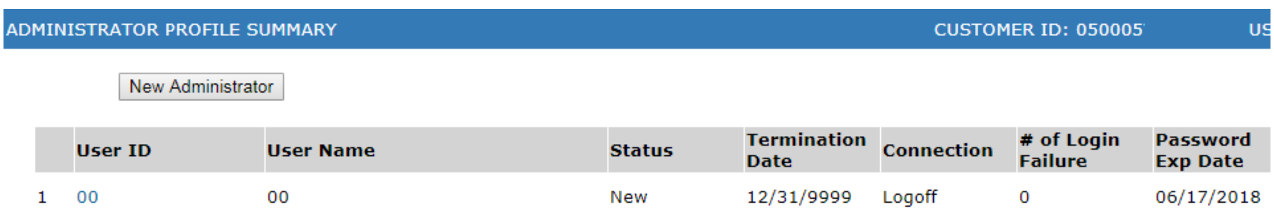
## ACCOUNT ADMINISTRATION

1. On the top menu bar, click on *Account Admin* to reveal the sub-menu.
2. Click *Administrators*, *Modify Account*, *Change Password* or *Self-Service*.

### ADMINISTRATORS

This feature is available to the Primary Account Administrator only. It allows the Primary Account Administrator to add sub-administrators to help maintain SmartBenefits. Note that the Primary Account Administrator must perform password resets for sub-administrators that are unable to take advantage of the automatic password reset feature.

1. Click *Administrators* to view your User ID and any sub-administrators you added.
2. To add new sub-administrators, click *New Administrator*. A dialog box will appear. Fill in the required information and click *Save*.
3. To remove a sub-administrator, click on the administrator's name in the list, change the Status to Terminated, and click *Save*.


ADMINISTRATOR PROFILE SUMMARY CUSTOMER ID: 050005 US

New Administrator

| | User ID | User Name | Status | Termination Date | Connection | # of Login Failure | Password Exp Date |
|---|---|---|---|---|---|---|---|
| 1 | 00 | 00 | New | 12/31/9999 | Logoff | 0 | 06/17/2018 |

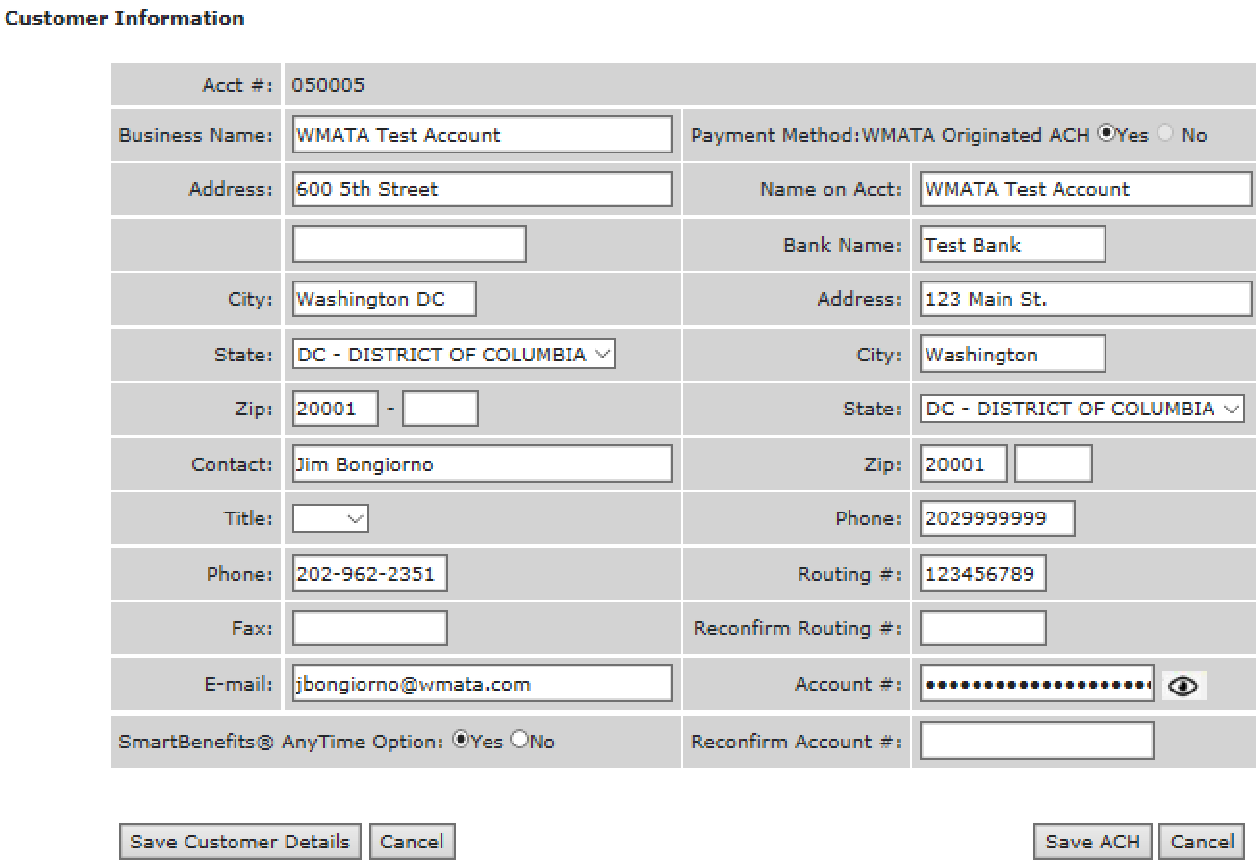
### MODIFY ACCOUNT

Any administrator can view the Modify Account page; however, only the Primary Account Administrator may make changes and see the bank account number.

The page has two sides.

- The left side has your contact information and lets you opt in to SmartBenefits Anytime.
  - Unless you indicate otherwise on the Self-Service page, the contact information here will display on your participants' SmartBenefits Dashboard.
  - Click *Save Customer Details* to save your changes. You'll see a response.
- The right side lets you select and maintain the WMATA Originated ACH Payment Method
  - Selection
    - If you select WMATA-Originated ACH, you are authorizing WMATA to automatically debit your bank account the first business day after your monthly order deadline for the total amount of your order.
    - Click *Save ACH* to save your changes. You'll see a response.
    - If you want to switch to a different payment method in the future, then contact your SmartBenefits account executive.
    - The WMATA-Originated ACH feature is disabled for government agencies that pay by purchase order.

- Maintenance
  - You can update and save your WMATA-Originated ACH information at any time.  However, changes made after your order deadline will not take effect until your following order.
  - When you make a change, you must reconfirm your bank routing number and bank account number.
  - Click the *eye icon* to display your bank account number.
  - Click *Save ACH* to save your changes.  You'll see a response.




## CHANGE PASSWORD

Your password may be any combination of letters and numbers that follow the Password Rules on the screen.   Simply complete the dialogue box and click *Save*.

## SELF-SERVICE

The Self-Service configuration determines what your participants see and can do on the SmartBenefits Self-Service Dashboard Page linked to their SmarTrip account.

The Self-Service configuration can be viewed by any administrator, but changes may only be made by the primary administrator.  Changes may be made at any time.

By default, the contact information under Modify Account is displayed to your participants and each Employee Self-Service Option is set to Yes.

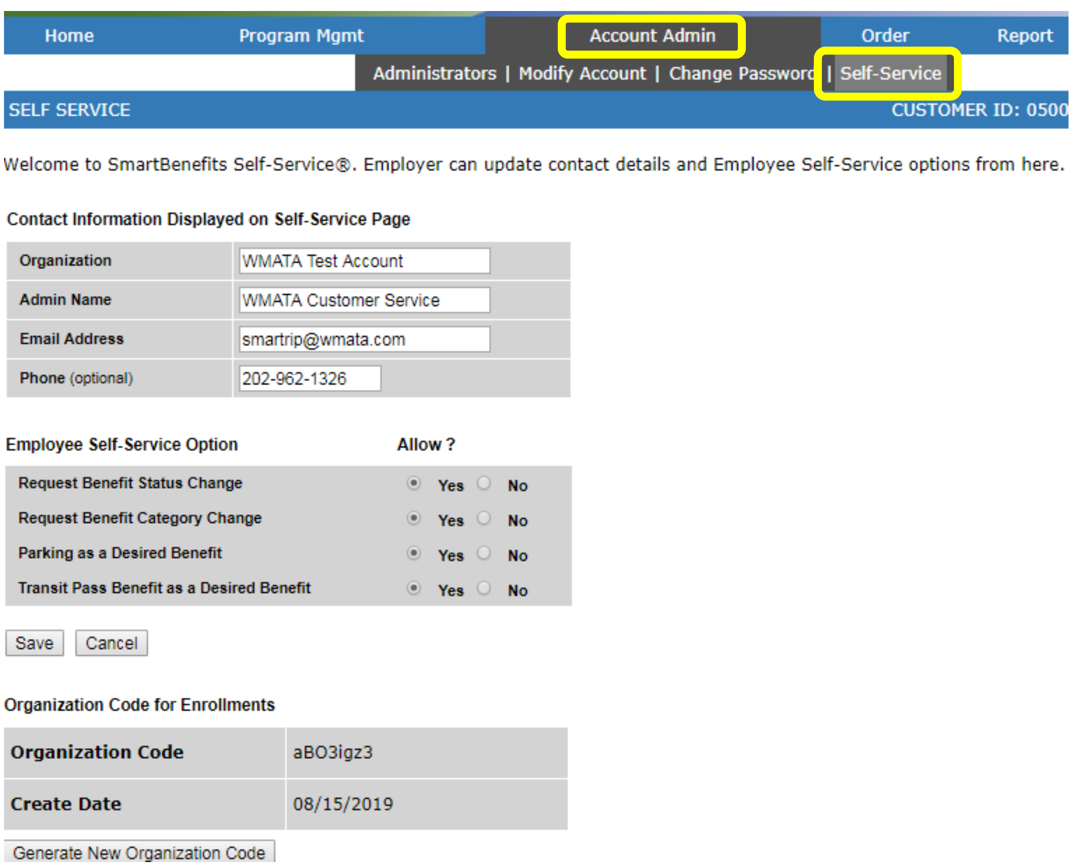
If you want to display the contact information for a different administrator on the participant Self-Service page, then modify and save the Contact Information Displayed on the Self-Service Page. The changes you make here will not alter the primary contact information listed under Modify Account.

The Employee Self-Service Option lets you tailor the self-service feature to meet your needs.

- Selecting “No” for the Request Benefit Status Change and/or the Request Benefit Category Change will prevent your participants from submitting those changes from their SmartBenefits Self-Service Dashboard. However, your participants will still be able to view their upcoming benefits.
- Selecting “No” for Parking as a Desired Benefit or Transit Pass as a Desired Benefit will prevent participants from entering amounts for those benefit types when they submit a benefit category change request. If you do not have any benefit categories that offer a parking or a transit pass benefit, then it makes sense to select No for these two options.

Share the Organization Code for Enrollments with new enrollees to allow them to submit their enrollment request via their SmarTrip account.

- See the Program Management/Self Service Enrollment Requests section for more info.
- If you are ever concerned that your Organization Code has been compromised, simply click *Generate New Organization Code*. The new code will take effect immediately.



## ORDER

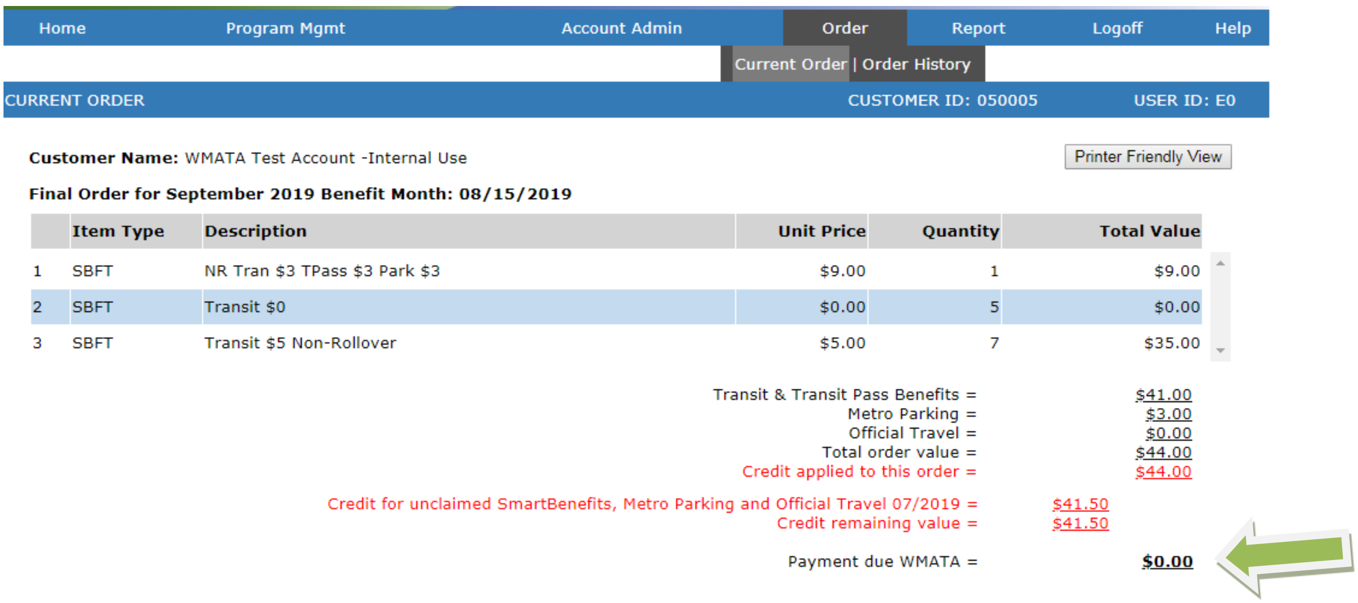
**Your order is automatically placed each month on your order deadline. After your order deadline, your order cannot be changed.**

1. On the top menu bar, click *Order* to reveal the sub-menu.
2. Click *Current Order* or *Order History*.

### CURRENT ORDER

This page displays the status of your order for the upcoming benefit month. Your order deadline appears in red under Customer Name and the Order as of date on the left side as well as at the bottom of the page.

The example below shows the final status for an August 2019 order for September benefits for an account with a 15th of the month order deadline. Credits from prior months for unclaimed non-rollover benefits and retrieved benefits will be automatically displayed.

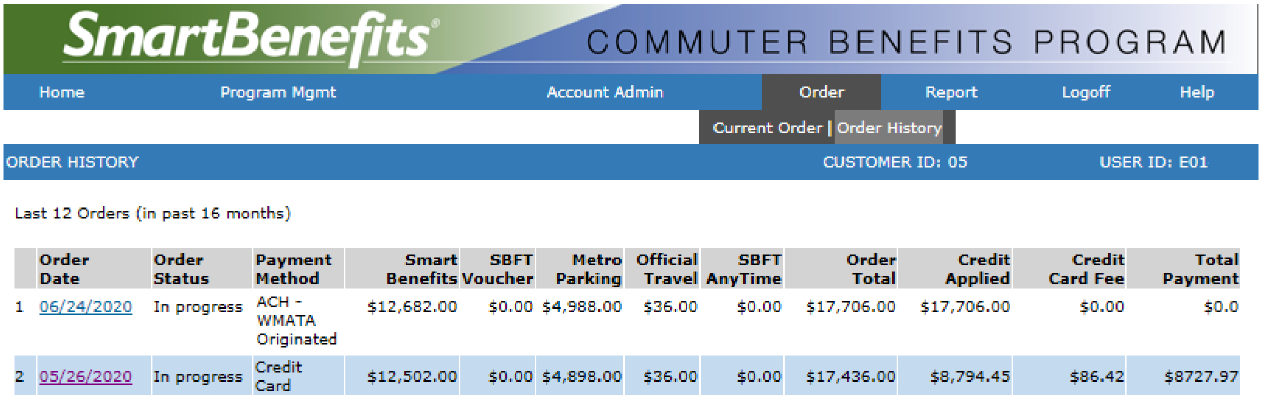



Your payment method appears at the bottom of the Current Order page.

- If you pay by credit card, you will also see a Credit Card Convenience Fee (#.#%) line. This fee is applied to the total order value net of any credits.
- ***Customer Originated ACH Payments are not processed automatically. Please submit the amount on the <u>Payment Due WMATA</u> line by the first business day after your order deadline month to avoid disruption in fulfilling your order.*** As a courtesy, we will send you a reminder email.

## ORDER HISTORY

To view a previous order, click *Order History* and then the date of the order. The last 12 orders over the past 16 months are kept online. You can download orders to maintain additional history offline.




| | Order Date | Order Status | Payment Method | Smart Benefits | SBFT Voucher | Metro Parking | Official Travel | SBFT AnyTime | Order Total | Credit Applied | Credit Card Fee | Total Payment |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 06/24/2020 | In progress | ACH - WMATA Originated | $12,682.00 | $0.00 | $4,988.00 | $36.00 | $0.00 | $17,706.00 | $17,706.00 | $0.00 | $0.0 |
| 2 | 05/26/2020 | In progress | Credit Card | $12,502.00 | $0.00 | $4,898.00 | $36.00 | $0.00 | $17,436.00 | $8,794.45 | $86.42 | $8727.97 |

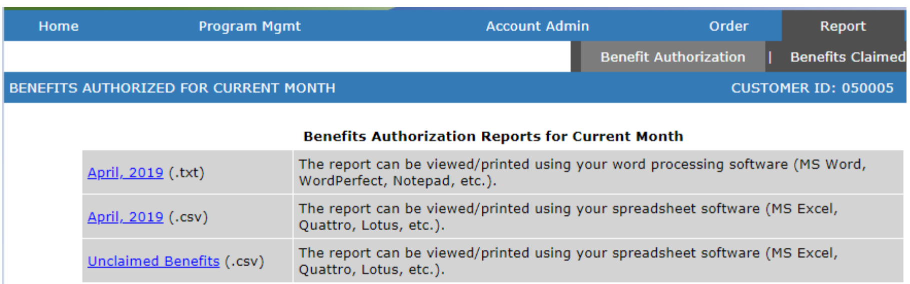
# REPORTS

1. On the top menu bar, click *Report* to reveal the sub-menu.
2. Click *Benefit Authorization*, *Benefits Claimed*, or *Reassignments.*

## BENEFIT AUTHORIZATION (current month reports)

To view or download the benefits you have authorized for the current month:

1. Click *Benefits Authorization*
2. Left click the [month].txt link to display the results or [month].csv to download them.
3. Click *Unclaimed Benefits* to view unclaimed benefits for the current month.

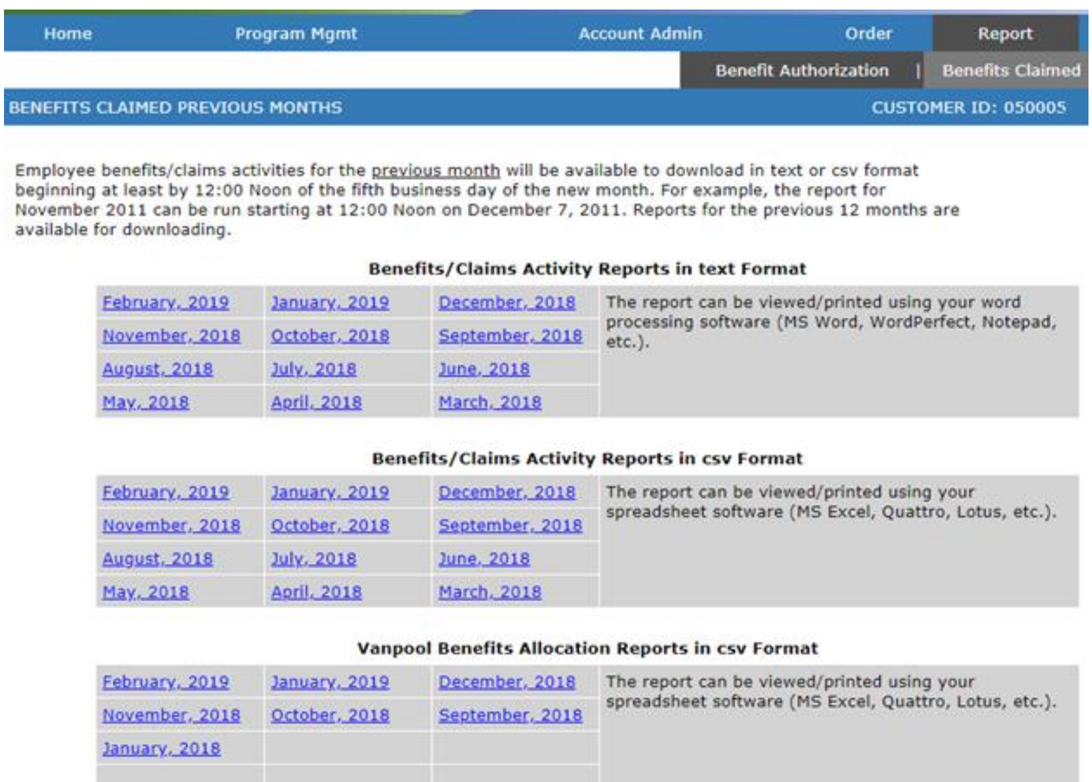



Benefits Authorization Reports for Current Month

| | |
|---|---|
| April, 2019 (.txt) | The report can be viewed/printed using your word processing software (MS Word, WordPerfect, Notepad, etc.). |
| April, 2019 (.csv) | The report can be viewed/printed using your spreadsheet software (MS Excel, Quattro, Lotus, etc.). |
| Unclaimed Benefits (.csv) | The report can be viewed/printed using your spreadsheet software (MS Excel, Quattro, Lotus, etc.). |

## BENEFITS CLAIMED (for previous months)

1. Click *Benefits Claimed*
2. Click on the desired month for the format (text or csv) that you prefer.




Employee benefits/claims activities for the previous month will be available to download in text or csv format beginning at least by 12:00 Noon of the fifth business day of the new month. For example, the report for November 2011 can be run starting at 12:00 Noon on December 7, 2011. Reports for the previous 12 months are available for downloading.

Benefits/Claims Activity Reports in text Format

| | | | |
|---|---|---|---|
| February, 2019 | January, 2019 | December, 2018 | The report can be viewed/printed using your word processing software (MS Word, WordPerfect, Notepad, etc.). |
| November, 2018 | October, 2018 | September, 2018 | |
| August, 2018 | July, 2018 | June, 2018 | |
| May, 2018 | April, 2018 | March, 2018 | |

Benefits/Claims Activity Reports in csv Format

| | | | |
|---|---|---|---|
| February, 2019 | January, 2019 | December, 2018 | The report can be viewed/printed using your spreadsheet software (MS Excel, Quattro, Lotus, etc.). |
| November, 2018 | October, 2018 | September, 2018 | |
| August, 2018 | July, 2018 | June, 2018 | |
| May, 2018 | April, 2018 | March, 2018 | |

Vanpool Benefits Allocation Reports in csv Format

| | | | |
|---|---|---|---|
| February, 2019 | January, 2019 | December, 2018 | The report can be viewed/printed using your spreadsheet software (MS Excel, Quattro, Lotus, etc.). |
| November, 2018 | October, 2018 | September, 2018 | |
| January, 2018 | | | |

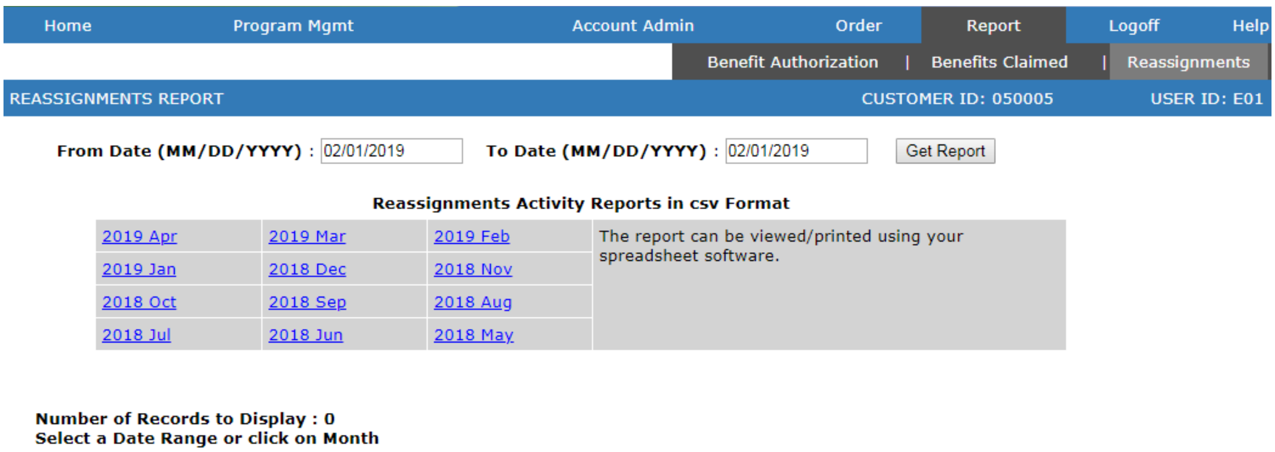
## REASSIGNMENT REPORT

The Reassignment Report shows reassignments made by participants who reported a lost/damaged SmarTrip card via their SmarTrip account as well as reassignments made by administrators.  There is one exception:  If a participant allocates 100% of their transit benefit to a third-transit provider such as a vanpool, then the reassignment will not appear on this report.

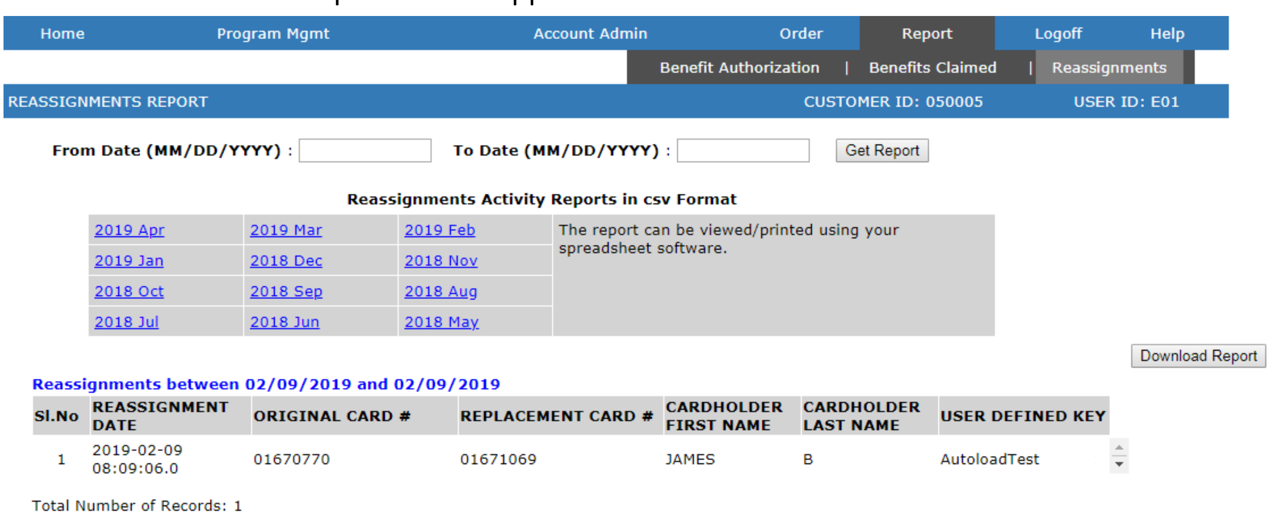
There are two ways to generate the report:

- Click on one of the months to open a .csv file.   Up to 12 months of history are accessible.
- Enter dates and click *Get Report* to display the results.
    - You can enter a specific day or a date range spanning multiple months
    - Once the results are displayed, click *Download Report* to obtain a .csv file.

Enter Date Range




Results and Download Report Button Appear



## CUSTOMER SERVICE

**Metro Home Page:** https://www.wmata.com/

**SmartBenefits® Home Page:** wmata.com/smartbenefits

**Create a SmarTrip® Account:** https://smartrip.wmata.com/Account/Create

**How to Use SmartBenefits (for participants)** https://www.wmata.com/business/smartbenefits/How-to-Use-SmartBenefits.cfm

**SmarTrip® & SmartBenefits® Customer Service**:

Participants: 1-888-SMARTRIP (762-7874) or smartrip@wmata.com

Employers (including primary account administrator password resets): 202-962-1326 or smartrip@wmata.com

**SmartBenefits® Account Executives**: smartbenefits@wmata.com

**Commuter Direct:** 703-228-RIDE (7433)

**MetroAccess:** 301-562-5360