



Washington Metropolitan Area Transit Authority

SmartBenefits[®]

Autoload

Process Overview for Program Administrators

Office of Marketing
SmartBenefits[®] Sales Team

July 2011

Dates and processes in this presentation are subject to change.



Purpose

- Prepare for SmartBenefits® Autoload
 - Smooth transition for employer
 - Employee benefits uninterrupted
 - More efficient use of resources
- Why change?
 - Comply with IRS mandate by January 2012
 - Better control of transit and parking benefits allocations





SmartBenefits® Today

- Employer assigns transit and/or parking benefit
- Employee loads at Metro station or reassigns to transit provider
- Transit and parking benefits combined in stored value purse
- Unused but claimed benefits remain on SmarTrip® card
- \$300 maximum stored value on SmarTrip®
- \$200 maximum stored value on CharmCard®



SmartBenefits[®] Changes



SmartTrip[®] Compartments

- Transit benefit
- Metro parking benefit
- Personal stored value



SmarTrip® Card Options

A graphic showing three yellow boxes with text, set against a background of a stylized cityscape with a train and a bus. The boxes are separated by vertical yellow lines. At the bottom of the graphic is the SmarTrip logo.

Card Option	Value
PERSONAL (STORED VALUE) PURSE	\$300
TRANSIT BENEFIT PURSE	\$230
PARKING BENEFIT PURSE	\$230

M metro SmarTrip®

IRS Limit

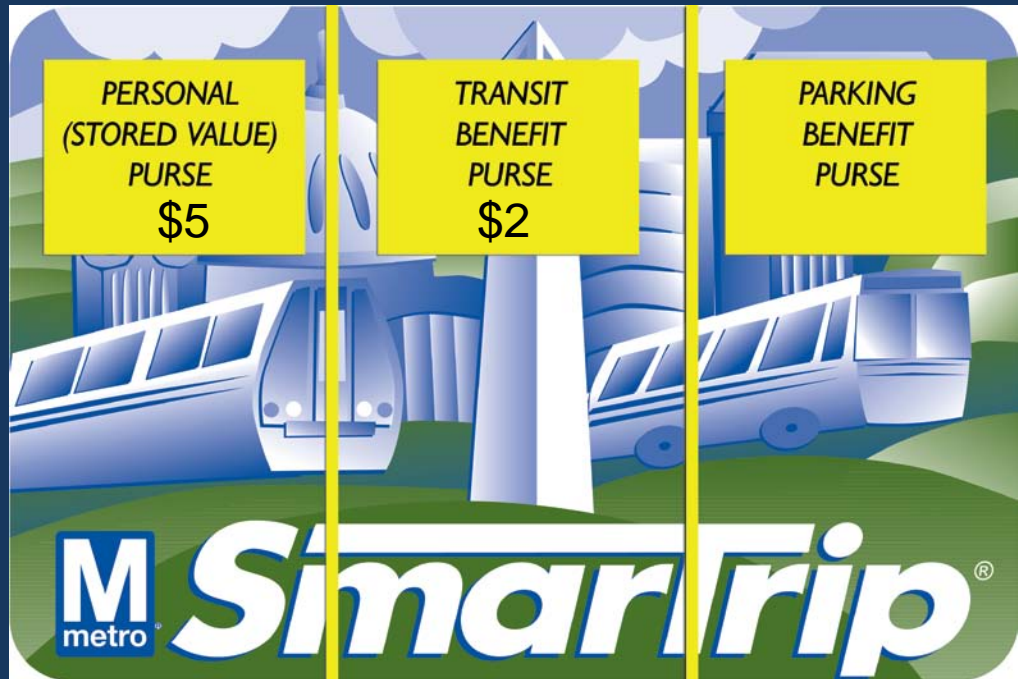
IRS Limit



SmarTrip® Fare Example 1

A. Value on card \$7
\$5 stored value
\$2 transit benefit

B. \$ 4 Metrorail fare



C. \$4 Payment = \$2 from transit & \$2 from stored value

C. Remaining value on card: \$3 stored value



SmarTrip[®] Fare Example 2



A. Value on card \$51
\$0 stored value
\$50 transit benefit
\$1 parking benefit

B. Commuting Costs \$7
\$3 Metrorail fare
\$4 Metro parking

C. \$7 Payment: \$3 from transit, customer must add \$3 to card at vendor to cover full parking fee

D. Remaining value on card: \$47 transit



New Benefit Type Options

WMATA SmartBenefits - Windows Internet Explorer

https://www.smarttrip.com/sbftq/RTBP.mmenupage?v_p=3233131373334353B3E5934393323315E46383A3C3E30493439332331

File Edit View Favorites Tools Help

WMATA SmartBenefits

SmartBenefits Transit Benefit Program

Home WMATA Administration Program Management Account Administration Order Reports Logoff Help

Reset Password | View Benefit Activity | News Center

Benefit Category/Amount Creation Process
CUSTOMER ID: 050005WMT56789

ADD BENEFIT AMOUNT

Step 2 - Define Benefit Amount and Benefit Type
Enter the SmartBenefits benefit amount. Select SmartBenefits, Metro Parking, or Official Travel as Benefit Type. Enter monthly Benefit Amount.
Note: The Benefit Amount range is 0.05 to 999.95 and must be in nickel increments. Be sure to click **Save** when you're done.

Category Type: 175T60P

Benefit Type: **NEW** Transit Non-Rollover

Benefit Amount: Transit Non-Rollover

Benefit Status: Parking Non-Rollover
Transit Rollover
Parking Rollover
SmartBenefits
Metro Parking
Official Travel

- Transit Non-Rollover
- Parking Non-Rollover
- Transit Rollover
- Parking Rollover
- Official Travel

Done Internet 100%



Employer Preparation

- Pre-migration Preparation
 - Review and update Account Administrator information
 - ALL SmarTrip® cards must be registered to participate
 - Decide treatment of unused benefits
 - Non-Rollover will credit back to employer account
 - Rollover to employee account
 - Default is Non-Rollover – Only send email to Metro Rep if you want Rollover
 - Initial Benefit Type conversion
 - Metro will establish benefit type if ALL Non-Rollover or ALL Rollover
 - Order confirmation date will be a few days earlier to migrate accounts



Prep Your Employees

- Employees cannot have multiple employers applying SmartBenefits® to same card – each needs separate card
- MUST tap card to Farecards & Passes machine if it has not been presented to target since December 2010
- All funds on card month prior to conversion will remain in stored value purse
- View balance and transactions
 - Transit purse – rail faregate or bus farebox
 - Parking purse – parking target
 - Personal stored value – Farecards & Passes machine
 - All balances and transactions – create online SmarTrip® account



SmarTrip® Online Account

WMATA SmarTrip® - Windows Internet Explorer

https://smartrip.wmata.com/Card/CardSummary.aspx?card_id=2948564

File Edit View Favorites Tools Help

WMATA SmarTrip® WMATA SmarTrip®

LOG OUT

Fares

- Metro rail
- Metro bus
- SmarTrip®**
- Reduced Fare Program
- Purchase Fares

Card Summary Information

Card Information

Card Nickname: ALP Pilot Card
Card Number: 011952691
Card Status: Active

Note: the displayed balances in the categories below might not reflect all transactions that have occurred on a bus for up to three business days.

Manage Your SmarTrip® Card

- Manage Your SmarTrip® Account
- Update Card Information
- View Usage History
- Report Cards as Lost/Stolen/Damaged or Malfunctioning
- Remove SmarTrip® Card
- FAQs

Stored Value

The Stored Value reflects the amount stored on the card that can be used for transit and parking without restrictions.

Balance: 17.55

SmartBenefits®

[Learn more about SmartBenefits®](#)

Name	Operator	Period	Period End Date & Time	Period Remaining Value	Period Initial Value
ALP SB Prk FF	Regional Op.	Calendar Monthly	05/01/2011 12:00 AM	\$160.00	\$160.00
ALP SB Trm FF	Regional Op.	Calendar Monthly	05/01/2011 12:00 AM	\$111.10	\$120.00

Done Internet 100%

stored value →

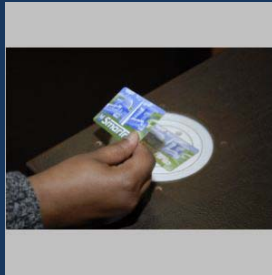
parking purse →

transit purse →



Employee Preparation Process

1. Tap enrolled card to SmarTrip® target last two weeks prior to migration month to load Autoload product



2. First day of benefit month, benefits will be available to use
3. Tapping the card to a SmarTrip® target must be done whenever the card is replaced or there is a change to benefit amount or type
4. Report lost or replacement card immediately to:
 - **SmarTrip® Customer Service** for Stored Value Purse transfer
 - **Employer** for Transit and/or Parking benefits reassignment to new card



SmartBenefits[®] & SmarTrip[®] Transit Systems

- SmartBenefits[®] Autoload participating systems
 - Metrorail and Metrobus
 - ART
 - CUE
 - DASH
 - DC Circulator
 - Fairfax Connector
 - Loudoun County Transit
 - PRTC Omni Ride
 - Ride ON
 - TheBus





Vanpool and Transit Services

- Passenger allocation transit services & allocation closing date
 - MetroAccess – last day of the month
 - Van pools – last day of the month
 - Independent bus systems – last day of the month
 - Arlington County stores – 16th of the month
 - Commuter Direct – mail order service – 16th of the month
 - MTA Commuter Bus – 20th of the month & order ticket with MTA before 25th
 - VRE – Broad Run – 20th of the month
 - VRE – Leeland – 20th of the month
 - VRE – Quantico – 20th of the month
 - VRE – Union Station – 20th of the month
 - VRE – Woodbridge – 20th of the month
- Employees must allocate benefits prior to service providers closing date



SmartBenefits[®] AnyTime

A Handy Tool

- Quick fix to increase employee benefit amount
- Eliminates need for vouchers for employees that ride a system that accepts SmarTrip[®]
- Option for providing transit benefit for interns
- Payment method previously agreed upon will cover both SmartBenefits[®] and SmartBenefits[®] AnyTime orders
- Eliminates 45-day waiting period to start SmartBenefits[®]
- Use when employees do not present card to target to load product





Additional Points

- SmarTrip® serial number format changes
 - 0020 0001 6780 140 5 and 0020 0002 6780 140 5
 - Use 9 underlined sample numerals for SmartBenefits® enrollment
- SmartBenefits® vouchers
 - June 2011 last order from employers
 - December 2011 last acceptance from regional transit participants
- What do I do with leftover vouchers?
 - **Use them Now**
 - October 2011 - contact Metro Rep if still have vouchers





Features & Customer Benefits

Features

Separate transit from parking



Unused benefit treatment



Autoload



Self-service web access



Bus & Rail system upgrade



Customer Benefits

IRS compliance
Use of benefits as intended

Rollover or credit account option

Access at any SmarTrip® target
except CPOS unit

View balance and transactions

Regional standardization &
interoperability



Impact of Non-Rollover during Pilot

- Federal agency participant experienced
 - 30 percent increase in credits for unused benefits
 - Credits compared during four months for two years



Results may not be typical for all customers



Next Steps

- Review your account
- Develop a plan to communicate with employees
- Make sure all cards are registered
- Establish SmartBenefits® AnyTime funds
- Execute communications plan



Thank You

SmartBenefits[®]

Questions and Answers