

Getting Started

With

SmartBenefits[®]

Autoload

SmartBenefits[®] Commuter Benefits & Official Travel

Washington Metropolitan Area Transit Authority

Office of Marketing

600 Fifth Street, N W – Room 6G

Washington, DC 20001

MetroOpensDoors.com

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Helpful Tips

- Use SmartBenefits[®] to assign value to SmarTrip[®] cards to provide your employees with Metrorail, Metrobus, MetroAccess, participating regional bus systems, registered van pools and Metro parking fees for the commuter transit and parking benefits program. In addition, SmartBenefits[®] can be used to provide Official Business Travel for employees.
- Before you start to assign benefits, survey your employees to determine how much should be assigned as transit and/or parking benefits. Then create the 'Benefits Category' for each combined amount. After those are created, it is easier then easier to add your employees.
- SmartBenefits[®] Autoload Benefit Type
 - **Transit Non-Rollover** – unused transit benefits will credit back to employer's account
 - **Parking Non-Rollover** – unused parking benefits will credit back to employer's account
 - **Transit Rollover** – unused transit benefits will rollover to employee's transit account
 - **Parking Rollover** – unused parking benefits will rollover to employee's parking account
 - **Official Travel** – non-IRS compliant for transit and parking benefits
- Review your Customer Information screen periodically to assure that your information is current.
- Be sure to notify your Metro account representative of any changes to your payment method: credit card number and expiration date, purchase order number and expiration date and account contact information.
- After three unsuccessful attempts to log-on the system, you will not be allowed access. Please call the Office of Marketing at 202-962-1326 and select option 3 to have the password reset.
- The main Account Administrator is the only person that can view, add, modify, and terminate users/administrators on your SmartBenefits[®] account.
- Bookmark the SmartBenefits[®] login page using your web browser to enable quicker access.
- Access to SmartBenefits[®] requires Microsoft Internet Explorer 5.0 or higher.
- Don't wait until the last minute- **confirm your SmartBenefits[®] order before the 15th of each month.**

SmarTrip[®] Serial Number Format

Please use the nine [NUMBERS IN BRACKETS] shown below. When requesting your employees' nine-digit serial numbers, ask them to begin with the numbers 01 or 02. See examples below:

Example 1: [012345678]

Example 2: [012345678] 3

Example 3: 0020 00 [01 2345 678] 1

Example 4: 0020 00 [02 4561 217] 8

When To Use The Remove and/or Suspend Function

- **Remove Employee:** The remove function prevents benefits from being loaded for the employee or SmarTrip card specified. **This function cannot be performed between the 16th and the last day of the month.**
- **Suspend Employee:** The suspend function will **NOT** allow the employee to receive any unclaimed benefits associated with the current claiming month. Also, you may suspend the upcoming month's benefit starting on the 28th. To discontinue the benefit for consecutive multiple months, use the remove function.

Program Management

1. On the top menu bar, mouse over "Program Management" to reveal the list of tasks below.
2. Move your cursor to the task you wish to perform, and click on it.

Task: Create Benefit Amount

Note: This function cannot be performed between the 16th and the last day of the month.

STEP 1 - Create Benefit Category and Amount

1. Click on the "New Benefit Category" button. Add Benefit Category dialog box will appear.
2. Click on each blank to activate the field and key in the appropriate information. Use up to seven characters to describe the 'Category Type'
3. When finished, click on the "Save" button.

Example A. Category Type **T100** - Category Description: **\$100 Transit Non-Rollover**

The screenshot shows a dialog box titled "ADD BENEFIT CATEGORY" with a sub-header "Step 1 - Add Benefit Category". Below the sub-header is a paragraph of instructions: "Enter the SmartBenefits benefit category information in the following fields. Be sure to click **Save** when you're done. The system will go to next step to assist you with adding the benefit amount." The form contains three input fields: "Category Type" with the value "T100", "Category Description" with the value "\$100 Transit Non-Rollover", and "Category Status" with the "Eligible" radio button selected. At the bottom are "Save" and "Cancel" buttons.

Example B. Category Type **T125P50** - Category Description: **\$125 Transit and Parking \$50**

The screenshot shows a dialog box titled "ADD BENEFIT CATEGORY" with a sub-header "Step 1 - Add Benefit Category". Below the sub-header is a paragraph of instructions: "Enter the SmartBenefits benefit category information in the following fields. Be sure to click **Save** when you're done. The system will go to next step to assist you with adding the benefit amount." The form contains three input fields: "Category Type" with the value "T125P50", "Category Description" with the value "\$125 Transit \$50 Parking", and "Category Status" with the "Eligible" radio button selected. At the bottom are "Save" and "Cancel" buttons.

Example C. Category Type **OT50** - Category Description: **\$50 Official Travel**

The screenshot shows a dialog box titled "ADD BENEFIT CATEGORY" with a sub-header "Step 1 - Add Benefit Category". Below the sub-header is a paragraph of instructions: "Enter the SmartBenefits benefit category information in the following fields. Be sure to click **Save** when you're done. The system will go to next step to assist you with adding the benefit amount." The form contains three input fields: "Category Type" with the value "OT50", "Category Description" with the value "\$50 Official Travel", and "Category Status" with the "Eligible" radio button selected. At the bottom are "Save" and "Cancel" buttons.

STEP 2 - Define Benefit Amount and Benefit Type

1. Select: Transit Non-Rollover, Transit Rollover, Parking Non-Rollover, Parking Rollover or Official Travel (Non IRS Compliant) as Benefit Type.
2. Enter monthly benefit amount. The range is 0.05 to 999.95 and must be in nickel increments.
3. Click **Save** when done. The system displays the message "**BENEFIT AMOUNT HAS BEEN CREATED SUCCESSFULLY**".
4. You can either continue to add another benefit amount with a different Benefit Type under the same Benefit Category by changing the values, and click **Save**. Or, click **Finished** when done.
5. To create more Benefit Category type entries, repeat the process beginning with Step 1 above.

To continue performing SmartBenefits® administration tasks, make another selection from the menu bar. If you are finished performing SmartBenefits® administration tasks, please remember to log off.

Example A: **STEP 2**
Transit Non-Rollover

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: **T100**
Benefit Type: **Transit Non-Rollover** ▼
Benefit Amount: **100**
Benefit Status: Eligible Not Eligible

Save **Cancel**

Example B: **STEP 2**
Transit and Parking Benefits

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: **T125P50**
Benefit Type: **Transit Rollover** ▼
Benefit Amount: **125**
Benefit Status: Eligible Not Eligible

Save **Cancel**

ADD BENEFIT AMOUNT

BENEFIT AMOUNT HAS BEEN CREATED SUCCESSFULLY.

You can either continue to add another Benefit Amount with a different Benefit Type under this Benefit Category by changing the values, and click **Save**. Or, click **Finished** when you're done. **Note: The Benefit Amount range is 0.05 to 999.95 and must be in nickel increments.**

EXAMPLE: Under Category Type 150 you can have \$100 SmartBenefits (transit and vanpool) and \$50 Metro Parking. The above example will provide your employees with \$150 monthly benefit load on their SmarTrip card; \$100 SmartBenefits and \$50 for Metro Parking.

Category Type: **T125P50**
Benefit Type: **Parking Rollover** ▼
Benefit Amount: **50**
Benefit Status: Eligible Not Eligible

Save **Finished**

Example C: **STEP 2** Official Travel (Non IRS Compliant)

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: **OT50**
Benefit Type: Official Travel
Benefit Amount: 50
Benefit Status: Eligible Not Eligible

Task: Add Employee

1. Move the cursor to the first blank, click and enter the SmarTrip® card serial number.
2. Use the "Tab" or "Mouse" to move to the next data field. The program will automatically display the employee's name if the SmarTrip® card is registered. 'Not registered' will appear as the first name if the SmarTrip® card is not registered. Until the card is registered, type employee's name in the User Defined Key box. **All SmarTrip® cards MUST be registered to receive SmartBenefits® Autoload.**
3. Click either the "Enrolled" or the "Removed" button. Enrolled is the default.
4. In the "Kickoff Date" field, enter the date in mm/dd/yyyy format. The first available kickoff date is the default. The date must be the first day of the upcoming or future month.
5. To select a Benefit Category Type, make a selection from the pull-down menu.
6. Optional - User Defined Key: this information may be used to identify employees by another number, name or code.
7. Review your information. If you wish to erase the information and start over, click the "reset" button.
8. When you are finished, click **Save**. The system displays the message "**THE EMPLOYEE HAS BEEN SUCCESSFULLY ADDED**" in the lower portion of the screen.

To continue performing SmartBenefits® administration tasks, make another selection from the menu bar. If you are finished performing SmartBenefits® administration tasks, please remember to log off.

ADD EMPLOYEE

Enter the employee's SmarTrip card number. Use the 'Tab' key or 'Mouse' to move to the next data field. The program will automatically display the employee's name if the SmarTrip card is registered. 'Not Registered' will be appear as the first name if the SmarTrip card is not registered. Confirm kickoff date and benefit category type, then select **Save** when you're done.

Note: The benefits can only be loaded to a registered SmarTrip card.

SmarTrip Card Number:
First Name:
Middle Initial:
Last Name:
Status: Enrolled Removed
Kickoff Date: 01/01/2012 (mm/dd/yyyy)
Benefit Category Type: T100 - \$100 Transit Non-Rollover
User Defined Key:

Task: Employee List

This feature enables you to see all the SmartBenefits® information relating to each employee. You can sort the information into a format most convenient for you. You can also search by employee name or enrollment status.

EMPLOYEE SUMMARY [ADD EMPLOYEE](#) | [ADD BENEFIT CATEGORIES](#) | [DOWNLOAD EMPLOYEE LIST](#)

Sort By: ▼

When you choose a sort option, the program will automatically sort and display the information for you.

SmarTrip Card number: Status: ▼

| | Last Name | First Name | SmarTrip Card Number | Status | kickoff Date | Benefit Category | User Defined Key | Updated By | Updated Date Time | Benefits Assigned | Benefits Claimed | Reassignment Inquiry |
|---|-----------|------------|----------------------|----------|--------------|------------------|------------------|------------|---------------------|-------------------|------------------|----------------------|
| 1 | Sardarian | Wahik | 000423093 | Enrolled | 01/01/2012 | T100 | | SMKLT1 | 11/25/2011 11:37:36 | | | |
| 2 | Williams | James | 000286890 | Enrolled | 01/01/2012 | T125P50 | Accounting Dept | SMKLT1 | 11/25/2011 11:35:37 | | | |

1 - 2 of 2 Employees Displayed

To sort the information:

1. Choose a sort option from the pull-down menu.
2. When you choose a sort option, the program will automatically sort and display the information for you.

To search by key information:

1. Go to the following data fields and key in the data of the desired employee.

"First Name" or "Last Name" on the employee list sorted by employee name.

"SmarTrip® Card Number" on the employee list sorted by SmarTrip® card number.

"User Defined Key" on the employee list sorted by user defined key.

2. Click the status from the pull-down menu.
3. Click on "Find". The program will then display the information requested.

To change an employee's enrollment information:

1. Go to the employee's last name and click on it. You will be routed to an employee enrollment modification form.
 2. You can modify the status, benefit category type, or user defined field by re-keying the information or making another selection as indicated.
 3. Review your information. If you wish to erase the information and start over, click the "Reset" button.
 4. When you are finished, click Save.
- Return to the Employee List by selecting "Close" button.

Remove Employee: The remove function prevents benefits from being loaded for the employee specified. **This function cannot be performed between the 16th and the last day of the month.**

Suspend Employee: The suspend function will not allow the employee to receive any unclaimed benefits associated with the current claiming month.

Example: Employee is terminated after the 15th of the month, company has already ordered and assigned a benefit for the upcoming month. On the 28th or after, you can **suspend** those benefits **prior to being accessed** by former employee.

To view benefits assigned, benefits claimed, and benefit reassignment information:

1. Go to the icon (dancing person) associated to the information you want to look and click on it. The program will then display the information you are seeking
Return to the Employee List by selecting Close.

To add a new employee: See [Task: Add Employee](#)

To add a new benefit category or benefit amount: See [Task Create Benefit Amount](#)

To continue performing SmartBenefits® administration tasks, make another selection from the menu bar. If you are finished performing SmartBenefits® administration tasks, please remember to log off.

Task: Reassign Benefits

In the event an employee replaces their SmarTrip® card (due to loss or damage), you can reassign unused benefits from the old card to the new card in one step.

1. In the "Reassign benefit from SmarTrip® Card number:" field, key in the old nine-digit card serial number. **The card must already be registered to access SmartBenefits®.**
2. In the "to SmarTrip® card number" field, key in the new nine-digit card serial number.
3. Review your information. If you wish to erase the information and start over, click the "Reset" button.
4. When finished, click on the "submit" button.

The employee's enrollment status on the old card will automatically be changed to "Removed" and on the new card to "Enrolled." (There can be no other changes made to the employee's benefit reassignment (benefit category, kickoff date, user defined key) information at this time.)

If the transit and/or parking benefit for the current month are still available, reassignment can be done. If the employee has already used their entire benefit, it can only be reassigned to the new SmarTrip® card after the 28th day of the month.

For Official Travel, the portion that hasn't been loaded onto the card can be reassigned to the replacement card.

REASSIGN BENEFIT

Reassign SmartBenefits to an employee's replacement SmarTrip card so that the employee can receive any unclaimed benefits during the current month and the benefits in the upcoming months.

This process will change the employee's status for the "old" card serial number on the employee list to REMOVED, and automatically create a new employee listing with the "new" SmarTrip card serial number with the status ENROLLED. There can be no other changes made to the employee's benefit reassignment (benefit category, kickoff date) at this time.

**Note: The benefits can only be loaded to a registered SmarTrip card.
The benefits will be loaded to the new card in 3 to 5 calendar days.**

Reassign benefit from SmarTrip Card number:

to SmarTrip Card number:

Account Administration menu

1. On the top menu bar, mouse over "Account Administration" to reveal the list of tasks on the menu bar below.
2. Move your cursor to the task you wish to perform, and click on it.

Task: Add Administrator (This function is only available to the main Account Administrator)

1. To add additional users, click the "New Administrator" at the center of your screen. A dialog box will appear. The main Account Administrator is the only person that will have access to view, add, modify, reset passwords, and terminate users/administrators for your SmartBenefits® account.
2. Key in the information required in each field, or select an option from the pull-down menu where required.
3. Review your information. If you wish to erase the information and start over, click the "Reset" button.
4. When you are finished, click Save.

To continue performing SmartBenefits® administration tasks, make another selection from the menu bar.

If you are finished performing SmartBenefits® administration tasks, please remember to log off.

| ADMINISTRATOR PROFILE SUMMARY | | | | | | | |
|--|---------|---------------|----------|------------------|------------|---------|--------------------------|
| <input type="button" value="New Administrator"/> | | | | | | | |
| | User ID | User Name | Status | Termination Date | Connection | Failure | Password Expiration Date |
| 1 | 0000000 | DIANE O'NEILL | Password | 12/31/9999 | Logon | No | 07/27/2008 |
| 2 | 000001 | JANE DOE | Password | 03/28/2006 | Logoff | No | 06/22/2011 |

Task: Modify Account

(Modification is only available to the main Account Administrator; view is available to all users)

1. Move the cursor to the first blank, click to activate the field, and enter the appropriate information.
2. Fill in the remaining fields by keying in the required information or make a selection from the pull-down menu.
3. If shipping address is different from main address, click the "No" button and key in the correct shipping address.
4. SmartBenefits® AnyTime: Select Enable to establish SmartBenefits® AnyTime funds.
5. Unused Benefit Treatment: This function is for reporting purposes only. This DOES NOT impact actual treatment of unused transit or parking benefits.
6. When finished, click the "Submit" button.

Your information has now been submitted. To return to the menu bar, choose another task, or log off.

| Customer Information | |
|----------------------|-----------------------------|
| Acct #: | 050005WMT56789 |
| Business Name: | WMATA Demo TestAccount (QA) |
| Address: | 600 5TH STREET NW |
| | SMRT-6G |
| City: | WASHINGTON |
| State: | DC |
| Zip: | 20005 - |
| Contact: | D Smith |
| Title: | Mr |
| Phone: | 202-962-2771 |
| Fax: | 202-962-6103 |
| E-mail: | xxxxx@wmata.com |

Ship to above address? Yes No - Ship to:

Modify Account -- Continued

Ship to above address? Yes No - Ship to:

| | |
|----------|---|
| Address: | <input type="text"/> |
| | <input type="text"/> |
| City: | <input type="text"/> |
| State: | DC <input type="button" value="v"/> |
| Zip: | <input type="text"/> - <input type="text"/> |
| Contact: | <input type="text"/> |
| Phone: | <input type="text"/> |
| Fax: | <input type="text"/> |

SmartBenefits AnyTime Option: Enable Disable

The change of the SmartBenefits AnyTime option will be effective starting from next month. The SmartBenefits AnyTime order for current month will be processed.

Treatment of Unclaimed Benefits:

Transit Benefit: Credit Account Rollover to Employee Combination

Parking Benefit: Credit Account Rollover to Employee Combination

Submit

Task: Change Password

Your password may be any combination of letters and numbers. Passwords are case sensitive.

Password Rules:

- Must have at least 8 characters.
- Must include at least 2 numeric characters.
- Cannot use the following characters in password: <>&'.
- Must change password after 90 days.
- The last 5 passwords cannot be reused.

1. Enter current password in "Current Password" field.
2. Tab to the "New Password" field and enter your new password.
3. Tab to confirm new password field and enter your new password again.
4. If you make a mistake, click the "reset" button and try again. When you are finished, click Save.

You will use your new password the next time you log on to the SmartBenefits® system.

CHANGE PASSWORD

Please enter your information

Current Password:

New Password:

Re-type New Password:

Password Rules:

1. Password must have at least 8 characters in length.
2. Password must include at least 2 numeric characters.
3. The character shall not be used in password: <>&'.
4. Users must change password after 90 days.
5. The last 5 passwords can not be reused.

Order menu

Order must be placed no later than the 15th of each month. After the 15th of each month, order cannot be changed, increased or decreased for the upcoming month.

1. On the top menu bar, mouse over "Order" to reveal the list of tasks on the menu bar below.
2. Move your cursor to the task you wish to perform, and click on it.

Return to the menu bar to choose another task, or log off.

Task: Confirm Current Order

Order must be placed no later than the 15th of each month. After the 15th of each month, order cannot be changed, increased or decreased for the upcoming month.

To confirm the current month's order, select **Confirm Current Order**. The order will be displayed on your screen.

Confirm Current Order | Order History

Order must be submitted no later than midnight of the 22nd.


| ITEM TYPE | DESCRIPTION | UNIT PRICE | UNITS/# OF PATRONS | TOTAL |
|-----------|-----------------------|------------|--------------------|----------|
| | | \$0.00 | 0 | \$0.00 |
| | | \$0.00 | 0 | \$0.00 |
| SBFT | SmartBenefits AnyTime | \$200.00 | 1 | \$200.00 |

SmartBenefits Order = **\$275.00**
Metro Parking Order = **\$0.00**
Official Travel Order = **\$0.00**
SmartBenefits AnyTime Order = **\$200.00**
Total order value = \$475.00
Total Order and Adjustments = \$459.90
SmartBenefits Credit applied to this order = \$111.00
SmartBenefits Credit remained value = \$111.00
Payment Due WMATA = \$823.90

***See Adjustment Report (transactions from trips taken but not captured in network)**

Payment Procedure
Your account is set up for the following type of payment:
ACH - WMATA Originated

WMATA will originate ACH payment from customer's designated checking account by the first business day after the 22nd day of the month, for settlement by the following business day. If WMATA cannot complete the financial transaction by that date, SmartBenefits download will not be processed.



For Customer Originated Payment set up, submit the exact amount on the **Payment Due WMATA** line by the first business day after the 15th of each month. This will assure no disruption in fulfilling your order for employee benefits.

Task: Order History

To view past months' orders, select **Order History**. The order will be displayed on your screen.

| Order History: (last 12 months) | | | | | | | | | | | | |
|---------------------------------|-------------|-----------------|------------------------|---------------|-----------------------|---------------|-----------------|-----------------------|---------------------|-------------|----------------|---------------|
| Order Date | Status | Shipping Method | Payment Method | SmartBenefits | SmartBenefits Voucher | Metro Parking | Official Travel | SmartBenefits AnyTime | Autoload Adjustment | Order Total | Credit Applied | Total Payment |
| 10/13/2011 | In progress | N/A | n/a | \$965.00 | \$0.00 | \$305.00 | \$0.00 | \$300.00 | \$459.90 | \$1,570.00 | \$111.00 | \$1,618.90 |
| 09/14/2011 | In progress | N/A | n/a | \$20.00 | \$0.00 | \$0.00 | \$15.00 | \$0.00 | \$459.90 | \$35.00 | \$111.00 | \$383.90 |
| 08/14/2011 | In progress | N/A | n/a | \$314.00 | \$0.00 | \$0.00 | \$0.00 | \$100.00 | \$459.90 | \$414.00 | \$111.00 | \$662.90 |
| 07/18/2011 | In progress | N/A | ACH - WMATA Originated | \$100.00 | \$0.00 | \$50.00 | \$0.00 | \$0.00 | \$459.90 | \$150.00 | \$111.00 | \$698.90 |
| 06/13/2011 | In progress | N/A | n/a | \$111.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$111.00 | \$111.00 | \$0.00 |
| 04/20/2011 | In progress | N/A | n/a | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$500.00 | \$0.00 | \$500.00 | \$130.00 | \$370.00 |
| 03/24/2011 | In progress | Pick-Up | n/a | \$0.00 | \$250.00 | \$0.00 | \$0.00 | \$6,000.00 | \$0.00 | \$6,250.00 | \$130.00 | \$6,120.00 |
| 01/10/2011 | In progress | N/A | n/a | \$171.00 | \$0.00 | \$38.00 | \$0.00 | \$0.00 | \$0.00 | \$209.00 | \$130.00 | \$79.00 |
| 12/21/2010 | In progress | Pick-Up | n/a | \$148.00 | \$25.00 | \$38.00 | \$0.00 | \$0.00 | \$0.00 | \$211.00 | \$130.00 | \$81.00 |
| 11/23/2010 | In progress | N/A | n/a | \$1,111.00 | \$0.00 | \$210.00 | \$0.00 | \$0.00 | \$0.00 | \$1,321.00 | \$130.00 | \$1,191.00 |
| 10/18/2010 | In progress | N/A | n/a | \$800.00 | \$0.00 | \$210.00 | \$0.00 | \$0.00 | \$0.00 | \$1,010.00 | \$130.00 | \$880.00 |
| 09/20/2010 | In progress | N/A | n/a | \$196.65 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$196.65 | \$130.00 | \$66.65 |

Reports menu

1. On the top menu bar, mouse over "Order" to reveal the lists of tasks on the menu bar below.
2. Move your cursor to the task you wish to perform, and click on it.

Task: Benefit Authorization

To view benefits you have authorized for the current month, select either a .txt file or a .csv file.

A .txt file will enable you to view the information in MS Word, WordPerfect, Notepad, or other word processing applications. Download the file by right-clicking on the month and select "Save Target As" (Internet Explorer). Then save the file to your computer.

A .csv file will enable you to view the information in MS Excel, Quattro, Lotus, or other spreadsheet applications. Download the file by right-clicking on the month and select "Save Target As" (Internet Explorer). Then save the file to your computer.

Task: Benefits Claimed this Month

To review the current month's benefits and claims activity for any employee,

1. Enter the employee's SmarTrip card number in the field indicated.
2. Click "View" to see the information.
3. Click "Reset" to start over.

| Benefits Claimed / Unclaimed Current Month CUSTOMER ID: 050005WMT56789 | |
|--|--|
| The benefits / claims activity report for all employees in your organization are available for download from Benefits Claimed Previous Months after the current month is over, as a previous month's report. | |
| Enter the employee's SmarTrip card number to view the benefits / claims activity report for the current month. | |
| SmarTrip Card: <input type="text"/> | <input type="button" value="View"/> <input type="button" value="Reset"/> |
| OR | |
| Click on Unclaimed Benefit Report to view unclaimed benefits for the current month. | |
| <i>Note: This report will be available beginning 7th of each month</i> | |

Task: Benefits Claimed

To view benefits/claims activity reports for past months, decide which format you want to download: either text format (.txt files) or spreadsheet format (.csv files).

Click on the report you want (designated by month and year) from either the text format or csv format list.

If you are using Internet Explorer, select "Save Target As". Save the file to your computer.

| | | | |
|--|--|---|--|
| Benefits/Claims Activity Reports in text Format | | | |
| <ul style="list-style-type: none">o November, 2010o December, 2010o January, 2011o February, 2011 | <ul style="list-style-type: none">o March, 2011o April, 2011o May, 2011o June, 2011 | <ul style="list-style-type: none">o July, 2011o August, 2011o September, 2011o October, 2011 | The report can be viewed/printed using your word processing software (MS Word, WordPerfect, Notepad, etc.). Download the file by right-clicking on the month and select 'Save Target As' (Internet Explorer). Then save the file to your computer. |
| Benefits/Claims Activity Reports in csv Format | | | |
| <ul style="list-style-type: none">o November, 2010o December, 2010o January, 2011o February, 2011 | <ul style="list-style-type: none">o March, 2011o April, 2011o May, 2011o June, 2011 | <ul style="list-style-type: none">o July, 2011o August, 2011o September, 2011o October, 2011 | The report can be viewed/printed using your spreadsheet software (MS Excel, Quattro, Lotus, etc.). Download the file by right-clicking on the month and select "Save Target As" (Internet Explorer). Then save the file to your computer. |
| Autoload Adjustmenet Reports in Text Format | | | |
| <ul style="list-style-type: none">o November, 2010o December, 2010o January, 2011o Febuary, 2011 | <ul style="list-style-type: none">o March, 2011o April, 2011o May, 2011o June, 2011 | | The report can be viewed/printed using your word processing software (MS Word, WordPerfect, Notepad, etc.). Download the file by right-clicking on the month and select 'Save Target As' (Internet Explorer). Then save the file to your computer. |

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