



Washington Metropolitan Area Transit Authority

# *SmartBenefits*<sup>®</sup>

Autoload

Process Overview for Program Administrators

Office of Marketing  
SmartBenefits<sup>®</sup> Sales Team

October 2011

Dates and processes in this presentation are subject to change.



# Purpose

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





# 2012 Benefits Levels - IRS Bulletin

## Qualified Transportation Fringe Benefit

For taxable years beginning in 2012, the monthly limitation under 132(f)(2)(A), regarding the aggregate fringe benefit exclusion amount for transportation in a commuter highway vehicle and any transit pass, is **\$125**. The monthly limitation under 132(f)(2)(B), regarding the fringe benefit exclusion amount for qualified parking, is **\$240**.

- Complete 2012 benefit adjustments in online account by the December order confirmation / cut-off date



# *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<sup>®</sup> Changes

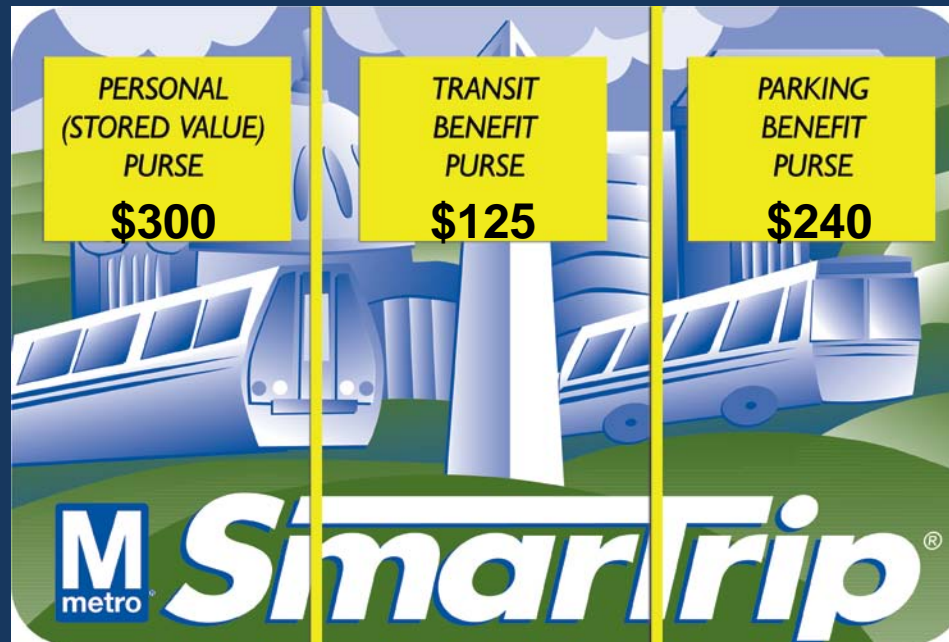


## SmartTrip<sup>®</sup> Compartments

- Transit benefit
- Metro parking benefit
- Personal stored value



# SmarTrip® Card Options



IRS Limit  
2012

IRS Limit  
2012

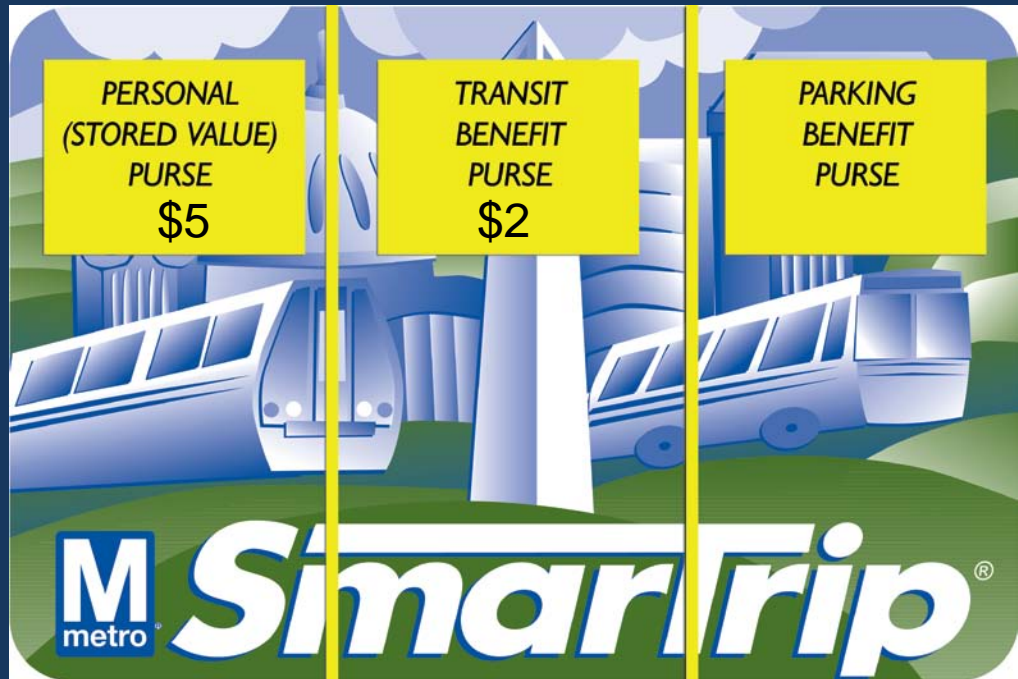
For Rollover customers, limit for transit purse \$4,045 and parking purse \$4,045



# 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: Transit Non-Rollover  
Benefit Amount: Transit Non-Rollover  
Benefit Status: [ ]

Transit Non-Rollover  
Parking Non-Rollover  
Transit Rollover  
Parking Rollover  
SmartBenefits  
Metro Parking  
Official Travel

NEW

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

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# Employer 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 if you want Rollover
- Benefit Type conversion for January 2012 benefits
  - Metro will convert Benefit Type if ALL Non-Rollover or ALL Rollover
  - Order cut-off date will be December 9 to allow Metro to convert accounts – regain access on December 16



# Employer Preparation for Parking and Transit Benefits

- For parking and transit benefits, must assign properly as Benefit Type before December order cut-off date
- Parking fees cannot be paid for out of transit purse and transit cannot be paid for out of parking purse
- Survey your employees if you are unsure how benefits are used
- Follow example on next page for transit and parking benefit assignments



# Transit & Parking Benefit Set-Up

- **EXAMPLE:** setting up a \$200 combined transit & parking benefit type
- **Step 1** – Category Type 150T50P
- Category Description: \$150 Transit \$50 Parking
- **Step 2** – Benefit Type: SmartBenefits – Benefit Amount 150.00
- Select SAVE
- Benefit Type: Metro Parking – Benefit Amount 50.00
- Select SAVE and then Select FINISHED
- Once established, assign to the appropriate employees



# 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
- Must have positive balance on card to access SmartBenefits®
- Reassigned, Restored and AnyTime funds – allow up to four days
- 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

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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<sup>®</sup> & SmarTrip<sup>®</sup> Transit Systems

- SmartBenefits<sup>®</sup> 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

- SmartBenefits® passenger allocation transit services & 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 – 16<sup>th</sup> of the month
  - Commuter Direct – mail order service – 16<sup>th</sup> of the month
  - MTA Commuter Bus – 20<sup>th</sup> of the month & order ticket with MTA before 25th
  - VRE – Broad Run – 20<sup>th</sup> of the month
  - VRE – Leeland – 20<sup>th</sup> of the month
  - VRE – Quantico – 20<sup>th</sup> of the month
  - VRE – Union Station – 20<sup>th</sup> of the month
  - VRE – Woodbridge – 20<sup>th</sup> of the month
- Employees must allocate benefits prior to service providers closing date



# SmartBenefits<sup>®</sup> AnyTime

## A Handy Tool

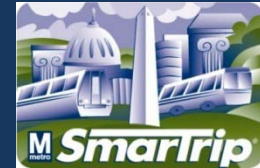
- Quick fix to increase employee benefit amount
- Eliminates need for vouchers for employees that ride a system that accepts SmarTrip<sup>®</sup>
- Option for providing transit benefit to interns
- Payment method previously agreed upon will cover both SmartBenefits<sup>®</sup> and SmartBenefits<sup>®</sup> AnyTime orders
- Eliminates 45-day waiting period to start SmartBenefits<sup>®</sup>
- 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
  - December 2011 last acceptance from regional transit participants, employees and employers
- What do I do with leftover vouchers?
  - **Use them before end of December 2011, or**
  - Contact Metro at 202-962-5700, must provide vouchers in unopened packages along with original invoice





# 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



# Next Steps

- Review your account to update contact info and benefit assignments
- Make sure transit and parking benefits are assigned properly. Assign transit to SmartBenefits<sup>®</sup> and parking to Metro Parking.
- Decide treatment of unused benefits: Rollover or Non-Rollover
- If Rollover, email Metro at [smartprograms@wmata.com](mailto:smartprograms@wmata.com) by December 5
- Make sure ALL cards are registered
- Establish SmartBenefits<sup>®</sup> AnyTime funds
- Notify employees of the changes



# Key Dates

- **November 1 – 21**: send email if you are offering a combination of Rollover and Non-rollover benefit treatment , you will configure benefit types and you will have a December 15 order cut-off. Set new benefit types in account between December 1 – 15.
- **November 15 – December 5**: send email if requesting a Rollover SmartBenefits account and Metro will handle conversion
- **December 9**: Order cut-off if Metro is handling conversion to new benefit types if all Rollover or all Non-rollover
- **For January 2012 benefits**: complete assignment of transit and parking benefit amounts prior to December 9 or 15 order cut-off

Send e-mail to [smartprograms@wmata.com](mailto:smartprograms@wmata.com)



Thank You

*SmartBenefits<sup>®</sup>*

[www.wmata.com](http://www.wmata.com)