

## **SmartBenefits® Reference Guide for Van Pool and Transit Services Passengers**

**To establish a SmartBenefits® passenger allocation account, you *must*:**

1) Have a SmarTrip® card that you registered with your name and address at the time you purchased it, or registered on the Metro website after you purchased it.

2) Be enrolled in your employer's SmartBenefits® program.

**VERY IMPORTANT:** You must be enrolled in your employer's SmartBenefits® program no later than the 15<sup>th</sup> day of the month prior to the month you wish to allocate your SmartBenefits® to your transit provider.

You will allocate your upcoming month's SmartBenefits® to your transit provider between the 16<sup>th</sup> day of the month and the last day of the month prior to the month you wish to use your SmartBenefits® for your transit provider. **Note:** If your transit provider is CommuterDirect.com or the Arlington County Commuter Stores, the allocation must be completed by the 16<sup>th</sup> day of the month prior to the month you wish to begin.

**For Example:** To allocate your SmartBenefits® to your transit provider for September 1, your employer must enroll you in their SmartBenefits® program no later than August 15. You then have from August 16 until August 31 to allocate your SmartBenefits® to your transit provider, for a September 1 "start" of the allocation.

1. Log onto the Van Pool & Transit Services website:

[http://www.wmata.com/business/employer\\_fare\\_program/vanpool\\_transit.cfm](http://www.wmata.com/business/employer_fare_program/vanpool_transit.cfm)

2. In the Van Pool Passenger section, click "**Step 2**" to set-up an account.

3. Click **Set-up My New Account** beneath **I'm a New SmartBenefits® User**.

4. Enter your SmarTrip® card number and click **Continue**.

5. Create a User ID and Password. When you have filled in all required information (information with \* must match the information on your SmarTrip® card registration in order to proceed to the next step), click the "**Submit This Form**" button. This will take you to "Welcome to the SmartBenefits® Passenger Allocation System" page. Click the "**Continue to SmartBenefits® Passenger Allocation System**" button.

6. Click on **Bill Payment**.

7. Click on **Make Payment**.

8. Choose employer/administrator name from the drop-down menu and click **Add Payment**.

9. Choose transit provider from the drop-down menu and click **Continue**.

10. Choose your transit provider number from the drop-down menu and click **Continue**.

11. Enter \$ amount into the payment amount line, and fill in the percentage line (review the examples). **Note:** If you are directing funds to a single transit service provider, the percentage amount must be 100 percent of the value.

Read more: [The Percentage of Federal Taxes Taken Out of Income | eHow.com](http://www.ehow.com)

[http://www.ehow.com/about\\_6192118\\_percentage-taxes-taken-out-income.html#ixzz1PqIY2XqW](http://www.ehow.com/about_6192118_percentage-taxes-taken-out-income.html#ixzz1PqIY2XqW)

and click **Continue**.

12. Click **Save**.

13. Click **Finish**.

14. Click **Logoff**.

**Your allocation will now be generated automatically on the first day of each month. You do not have to repeat the above process from month to month. Review, Modify, Discontinue Your Allocation.**

If you already have a SmartBenefits® allocation account, you can review your current SmartBenefits® passenger allocation, or you can modify or delete the allocation.

**Examples:** If you are switching from one van to another, you must DELETE your current allocation, and then create a new allocation to the new transit provider. If you are changing the amount of money you are allocating to a transit provider, you must MODIFY your current allocation to the new amount.

**VERY IMPORTANT:** You can modify or delete your SmartBenefits® allocation to your transit provider

no later than the last day of the month, prior to the month you wish that change to be effective.

**For Example:** To modify or delete your SmartBenefits® allocation to your transit provider effective September 1, you have from August 1 until August 31 to make the change.

**To Review, Modify or Delete your Transit Provider Allocation**

1. Log onto the Van Pool & Transit Services website:

[http://www.wmata.com/business/employer\\_fare\\_program/vanpool\\_transit.cfm](http://www.wmata.com/business/employer_fare_program/vanpool_transit.cfm)

2. In the Van Pool Passenger section, click “**Step 2**” to access the logon page for your existing account.

3. Beneath **I Already have an Account**, enter your SmarTrip® card number, User ID and Password, and then click “**Login**”.

4. Click **Bill Payment**.

5. Click **Make Payment**.

You can now Review, Modify, or Delete your van pool allocation.

**To modify your allocation:**

1. To MODIFY your allocation, click **Modify**.

2. Make change(s) in payment and/or percentage amount(s).

3. Click **Update**. When transaction is confirmed, click **Close**.

4. Review your Modification. Click **Logoff** if you’re done.

**To delete your allocation:**

1. Click **Delete**. You will see a message confirming the transaction.

2. If you want to do a new allocation to a new van pool or transit provider, click on **Bill Payment**, and then click **Make Payment** and do a new allocation to another transit provider.

3. If you are not doing a new allocation, click **Logoff**.

**Questions?** Call Metro’s Office of Marketing: 202/962-1326 (choose Option 3).

<p><b>NOTICE:</b> Do NOT download SmartBenefits® to your SmarTrip® card if you plan to use: a van pool, MARC, VRE, MetroAccess, MTA, D&amp;B Bus/Quick’s Commuter Service, National Coach Works/Martz, CommuterDirect.com or Arlington County Commuter Stores.</p>
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