

SmartBenefits® Reference Guide for Van Pools and Transit Services Operators

- 1: Apply for a SmartBenefits® Transit Operator Account. Go to http://www.wmata.com/business/employer_fare_program/vanpool_transit.cfm; in the “Van Pool & Transit Services Operators” section click on “**Step 1 - Apply for a New Account.**”
- 2: After you’ve established your Metro SmartBenefits® operator account and you’ve been provided with a Customer ID, User ID and Password:
 - 1) Log on to the website:
http://www.wmata.com/business/employer_fare_program/vanpool_transit.cfm
 - 2) In the “Van Pool and Transit Services Operators” section, click “**Step 3**” to access your account logon page.
 - 3) Sign in with your Customer ID, User ID and Password (password is case-sensitive) and click “**Login**”.

These **functions** are available:

- **Operator Number Maintenance** - add/maintain operator numbers and descriptions.
- **Administration** - create new account sub-users (drivers and administrative), reset sub-user passwords, delete sub-users; change account user manager’s password.
- **Accounts Receivable** - query upcoming month and previous months’ revenue.

IMPORTANT: You **must** perform the following functions in the order listed to activate your account and enable your passengers to allocate money to the transit provider:

1) Operator Number Maintenance

Click “**Add Operator Number**”. In the “Operator Number” box, you must indicate a number for the service. Even if you have only one vehicle or location, you must still create a number. If you have more than one, create additional numbers for them too. In the “Description” box, describe the service being provided. After typing in all information, click “**Add**”. The system will acknowledge your transaction. Click “**Close**”. You can review your entry on the “*Operator Number List*” page. To add another number, click the “**Add Operator Number**” button and repeat the process.

2) Administration

Click “**Administration**”. You **MUST** appoint a driver or administrator for each vehicle or location to enable your passengers to allocate their SmartBenefits® to a specific service. This **MUST** be done even if there is only one vehicle or location on your account. To appoint a driver or location, click “**Add New User**”.

To Add New User:

- Create a User ID for the driver. Use letters, numbers or a combination of both. The User ID is not case sensitive. Enter the first and last name of the driver in the appropriate spaces.
- All of the other information is optional, except for the password.
- Password: Create a temporary password (letters, numbers or a combination of both). NOTE: The password is case-sensitive.
- Set the “**System Usage**” button to “Driver/Transit Service”.
- Select the Operator Number from the drop-down list.
- Click “**Submit**”.

If you have more than one driver or location, you must create additional listings for each. After the user has been successfully entered, click “**Admin**” to return to the *Administration* page. To view your list of users, select the down-arrow next to “type”, select “Driver/Transit Service” and click “**Search**”.

3) Accounts Receivable

After you’ve completed the above-listed functions, passengers can allocate their SmartBenefits® to your service. To review passenger and revenue information for the upcoming month, click “**Forecasting**”. This will show you which passengers have allocated their SmartBenefits® to your van for the upcoming month. To review up to 12 months of the previous month’s allocations, enter the operator number and month and click “**Report**”.

When you’ve finished working with your account, click “**Logoff**”.

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