AUTOMATIC REASSIGMENT OF SMARTBENEFITS
FOR LOST/DAMAGED SMARTRIP CARDS   03/30/19

The Basics from the SmartBenefits Administrator's Perspective

- The existing self-service balance transfer process for lost/damaged SmarTrip cards will be expanded to include SmartBenefits as of March 30, 2019. **With one exception, SmartBenefits Administrators will no longer have to reassign SmartBenefits for lost/damaged cards.**
- The Exception: SmartBenefits administrators must still reassign the pro-rated refund from passes purchased with the Transit Pass Benefit. That refund typically occurs 1-to-2 days after the card is reported lost/damaged. (Exhibit 1)
- Reassignment Tracking (Exhibit 2): The new report under Report/Reassignments displays who processed a reassignment and the from/to card. The only reassignments that will not appear on that report are ones where the participant allocates 100% of their transit benefit to a third-party transit service provider such as a vanpool, CommuterDirect, or a mobile ticketing provider.
- SmartBenefits Administrators may still perform manual reassignments. However, we recommend limiting manual reassignments to the pro-rated pass refund and other extenuating circumstances.

The Basics from the SmartBenefits Participant's Perspective

- All SmartBenefits participants may use this self-service feature to reassign benefits.
- Replacement Card Requirements
    - It must never have been enrolled in SmartBenefits before;
    - It must be registered with the same first and last name as the lost card.
- The replacement card will inherit the balances and characteristics of the lost/damaged card just as if the SmartBenefits Administrator had performed the reassignment except for pro-rated pass refunds for unused passes purchased with the transit pass benefit. As noted above, that portion of the reassignment must still be performed manually by the SmartBenefits Administrator.
- On the replacement card's Card Summary screen, the transferred benefits will appear as either "1Time Bal Xfer or AnyTime" or "SB Trn 1Time" or "SB Prk 1Time" depending on nature of the transferred benefits. Like today, it is not combined with future monthly benefits and it is used before future monthly benefits are used.

How a Participant Performs a Self-Service Balance Transfer/Reassignment

1. Log in to your SmarTrip account
2. Click on the lost/damaged card on the Your Account page
3. Click Update Card Information to view the registered card name. (Exhibit 3)
4. Decide on a Replacement Card
    a. If you haven't already added a card that has not been previously received SmartBenefits, then purchase a card; go to the Your Account page; click "Add SmarTrip® Card", or;
    b. Order your replacement card by mail under the "Report Lost or Damaged Card" process;
    c. The *registered* first and last name on the replacement card must match the name on the lost/damaged card. (The card nickname is not the registered name.)
5. Click "Report Lost or Damaged Card" on the Card Summary Page (Exhibit 4)
6. Follow the instructions and prompts to complete the transfer/reassignment (Exhibit 5)

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EXHIBIT 1:   REASSIGMENT REPORT

This shows the result from entering a from and to date of 02/15/2019 and clicking Get Report.

EXHIBIT 2:   REASSIGN PRO-RATED PASS REFUND

The pro-rated pass refund appeared on the lost/damaged card 1-to-2 days after the participant submitted the request via his/her SmarTrip account.

You can view it on the Benefits tab via the Employee List/Employee Enrollment Modification page. The status will be "Pass refunded/Available."

Manually reassign the Pass Refund to the replacement card just as you do today.

EXHIBIT 3:   REGISTERED CARD NAME

Update Card Registration Information

Please check the data below and if necessary make changes. Your c
updated with this data. Any required fields that are currently blank
you to continue.

* Required Field

Card Serial Number:	0167130335125284
Card Nickname:	Test Lost Card
First Name:*	First Test
Middle Initial:	
Last Name:*	Last Test

Registered Card Name

EXHIBIT 4:   REPORT LOST OR DAMAGED CARD

Card Summary

Card Information

Card Nickname:	Test Lost Card
Card Number:	0167130335125284
Current Card Status:	Active

Stored Value: $0.00   ADD VALUE

Value available for public transit and parking.
Stored Value may not reflect recent transactions.

Passes   ADD PASS

You currently have no loaded passes.

History

» Order History
» Product Delivery History
» Use History
» MyTripTime Dashboard

Card Management

» Report Lost or Damaged Card
» Update Card Information
» Delete Card From Account

SmartBenefits

» Upcoming Benefits

EXHIBIT 5:   PARTICIPANT INSTRUCTIONS FOR LOST/DAMAGED CARD

Report Lost or Damaged Card

Cards reported lost or damaged will no longer be available for use.

For a description of the card replacement process, click here.

Card Information

Card Nickname: Test Lost Card

Card Serial Number: 0167130335125284

Rider Class: Full Fare

Report Options

*Required

Card Type:*   [Select Card Type   ∨]

Reason:*   [Select Reason   ∨]

IMPORTANT

Passes: The value of a used pass is pro-rated. The pro-rated value is added to your card's stored value unless the pass was purchased using SmartBenefits®.

SmartBenefits® Participants:
- Both your stored value and any remaining SmartBenefits® will be transferred to your replacement card. There is no need to contact the organization that provided your benefits unless your card had an unused pass. See Passes below.
- Your replacement card will inherit the same SmartBenefits® benefit status as your lost/damaged card.
- Allocations: If you allocate benefits to third-parties to purchase MARC, VRE, or MTA Commuter Bus passes, or use a vanpool or MetroAccess, then we'll send you an email with important instructions on how to maintain your allocation.
- Passes: Unused transit pass benefits will be automatically transferred to your replacement card's SmarTrip® Online account. However, if you are due a refund for a lost pass purchased with transit pass benefits, then you must ask your SmartBenefits® administrator to manually reassign the refund to your replacement card. The refund is typically available one-to-two days after you deactivate your card.