SMARTBENEFITS ONLINE BENEFIT STATUS & BENEFIT CATEGORY CHANGE REQUESTS

The Basics from the SmartBenefits Administrator's Perspective following the 03/30/19 Release

- *Check Your Self-Service Configuration Following the Release (Ex. 1)*
    - The new configuration page is located under Account Admin/Self-Service. It can only be modified by the primary administrator.
    - Contact Info Displayed to Participants
        - By default, the "Contact Information Displayed on Self-Service Page" (i.e., your participants SmartBenefits dashboard) will match the contact info under Account Admin/Modify Account.
        - If you want to keep your primary contact with us as is and display a sub-administrator or customer support info to your participants, then update contact info on this page.
    - Employee Self-Service Options
        - "Yes" is the default for each option.
        - If you want to opt out completely, then set both the Request Benefit Status Change and Request Benefit Category Change to "No".
        - If you opt out, then your participants will still be able to view their SmartBenefits dashboard as they do now.   With that in mind, be sure to update your contact info.
        - If you remain opt in and you do not have benefit categories that offer parking or transit pass benefits, then set those options to "No" to make it easier for your employees.

- For organizations taking advantage of SmartBenefits Self-Service:
    - Participants can request Benefit Status or Benefit Category changes online via the new SmartBenefits dashboard linked to their SmarTrip account.
    - Participants can submit their requests at any time. The system will store the request and automatically apply it to the appropriate benefit month following your approval.
    - Participant requests will appear under a new Program Mgmt/Change Requests menu item with before/after information. (Ex. 2)
        - The change requests page is a "to do" list with a new/pending count by the Find button.
        - The list combines the from/to for both Benefit Status and Benefit Category requests. The appropriate combination is bolded to let you make an easy comparison.
        - You can approve or reject the requests individually or as a group.
        - Approved requests are immediately transferred to the Employee List.
        - Rejected requests remain on the change request list to provide history; however, by default, only new/pending requests are displayed each time you open the page.
        - Change requests cannot be approved or rejected between the WMATA SmartBenefits order deadline and month end.   The buttons are disabled during this time.

- If change requests are pending, up to three alert emails will be sent to the primary administrator 10-days before, 5-days before, and the day of the WMATA SmartBenefits order deadline (typically the 15th of the month).

SMARTBENEFITS ONLINE BENEFIT STATUS &
BENEFIT CATEGORY CHANGE REQUESTS

The Basics from the SmartBenefits Participant's Perspective following the 03/30/19 Release

- We'll update the [How to Use SmartBenefits](#) web page with instructions on the new process.
- The first time an existing participant accesses the SmartBenefits dashboard the participant will be asked to agree to WMATA's terms and conditions.
- The SmartBenefits Dashboard shows the *upcoming* month's benefits. (Ex. 3) The current month's benefits are displayed on the SmarTrip Card Summary page.
- Benefit Status Change Request (Ex. 4)
  - From the dashboard, the participant clicks Change Status and select an option.
  - The screen will automatically display the earliest possible benefit month.
  - The actual benefit month depends on when you approve the request. If the approval happens after an order deadline, then the benefit month will automatically update.
  - The participant will receive emails confirming their request and your approval/rejection. The dashboard will also reflect their pending request until you decide.
  - Participants cannot make a second request while one is pending.

- Benefit Category Change Request (Ex. 5)
  - From the dashboard, the participant clicks the Change link.
  - The participant edits the amounts for the three possible benefit types that make up any benefit category: Transit; Metro Transit Passes (i.e. the Transit Pass Benefit); and Parking. (If you select No for Transit Pass Benefits and/or Parking on the Self-Service configuration page, then those benefit types will be greyed out to prevent data entry.)
  - The system compares the participants desired benefit to your existing benefit categories to find a match.
    - If a perfect match is found, then that option will be offered to the participant for confirmation.
    - If there is not a perfect match, then up to three benefit categories that most closely match the participant's desired benefit without going over the total are displayed. The participant may select one of those categories or the participant can cancel the request, ask you to create a new benefit category, and then repeat the process.
  - The participant will receive emails confirming their request and your approval/rejection. The dashboard will also reflect their pending request until you make a decision.
  - Participants cannot make a second request while one is pending.

EXHIBIT 1:   SELF-SERVICE CONFIGURATION

Home	Program Mgmt	Account Admin	Order	Report
Add Administrators	Modify Account	Change Password	Self-Service	

Contact Information Displayed on Self-Service Page

Organization	Acme
Admin Name	John Doe
Email Address	jdoe@acme.com
Phone (optional)	202-999-9999

Employee Self-Service Option	Allow?	
Request Benefit Status Change	⦿ Yes	○ No
Request Benefit Category Change	⦿ Yes	○ No
Parking as a Desired Benefit	⦿ Yes	○ No
Transit Pass Benefit as a Desired Benefit	⦿ Yes	○ No

[Save]   [Cancel]

EXHIBIT 2:   CHANGE REQUEST MANAGEMENT

Clicking the checkbox to the left of Last Name selects the entire list for approval or rejection.

In the example, the first request for John Edward is for a benefit status change.   The third request for James Smith is for a benefit category change.

We display the total monthly benefit amount to let you easily adjust your payroll or other systems for a benefit change.

The effective date will adjust automatically based on your order deadline date. In the example, the assumption is that the current date is 08/10/19, so the next effective date is 09/01/2018.

Home	Program Mgmt	Account Admin	Order	Report	Logoff	Help
Benefit Category	Add Employee	Employee List	SmartBenefits Any Time	Change Requests		

⬇ Download New 10

| Filter By: | Last Name | | | Effective Date | | 📅 | Status | New | ▼ | Find |

☑ Last Name	First Name	User Defined Key	SmarTrip Last Four	Request Date	Effective Date	Benefit Status	Benefit Category	Change Request	Monthly Benefit	Status
☑ Edward	John	ACME IT	1112	06/01/2018	09/01/2018	Enrolled	T200TP40P100	On-Hold	$340	New
☑ Smith	James	ACME IT	4539	07/21/2018	08/01/2018	Enrolled	T200TP50P100	On-Hold	$350	New
☑ Smith	James	ACME IT	4539	09/21/2018	11/01/2018	Enrolled	T200TP60P100	T180TP50P100	$360	New
☑ Rodriguez	Maria	ACME IT	6517	06/03/2018	07/01/2018	Enrolled	T200TP40P100	Removed	$340	New
☑ Russ	Robert	ACME IT	1002	07/21/2018	09/01/2018	Enrolled	T200TP60P100	Removed	$360	New
☑ Hernandez	Maria	ACME IT	3410	06/23/2018	08/01/2018	Enrolled	T200TP50P100	T150TP80P100	$350	New
☑ Miller	Carry	ACME HR	4514	08/03/2018	09/01/2018	Enrolled	T200TP60P100	Removed	$360	New

| Approve | Reject |

EXHIBIT 3:   PARTICIPANT SMARTBENEFITS DASHBOARD

EXHIBIT 4:   PARTICIPANT BENEFIT STATUS CHANGE REQUEST

After On-Hold is selected. The Earliest Effective date will change with the calendar. In this case, it was calculated assuming that today's date was 10/10/2018.

EXHIBIT 5:   PARTICIPANT BENEFIT CATEGORY CHANGE REQUEST

Click Change to go to this page.

Assume Parking at Metrorail Stations is increased from $100 to $110.

Desired Monthly Commuter Benefit Amount

(i) **Enter Your Desired Monthly Commuter Benefit Amount**
- Estimate your cost with our Trip Planner
- We've greyed out options your employer has excluded.

Monthly Amount	Benefit Type
$ 190	Transit Total
$ 50	MetroTransit Passes (inc. SmarTrip Regional Pa
$ 110	Parking at Metrorail Stations
$ 350	Total Monthly Commuter Benefit

[Continue] [Cancel]

The system found a perfect match to one of your existing benefit categories. After clicking Continue, the participant will be asked to confirm his/her choice. Once confirmed, the participant will see a success page and the request will be added to the Program Mgmt/Change Request list.

Your Employer's Commuter Benefit Category Options

These benefit categories most closely match your desired commuter benefits.
If these existing benefit categories do not meet your needs, then ask your organization
to consider creating a new category.

	Desired Benefit	● Perfect Match
Transit	$190	$190
Metro Passes	$50	$50
Metro Parking	$110	$110
Monthly Benefit	**$350**	**$350**
	(T190TP50P110)	

[Continue] [Cancel]