Vanpool & Transit Service Operator System
for SmartBenefits®

PROCESS OVERVIEW

Most SmartBenefits participants can allocate all or a portion of their monthly transit benefit to eligible vanpools and third-party transit service operators using the transit allocation feature on the SmartBenefits® Dashboard linked to their SmarTrip® account.

Your passengers can select your vanpool or transit service after you configure your account per the instructions below. They have until the 21st of each month to make their selection for the upcoming month. While your account is active, your contact information will also appear on WMATA's Vanpools page. (That page is updated every Monday.)

On the first of each month, your passengers will receive an email receipt that confirms the details of their SmartBenefits transit allocation. This email includes your account name, the operator number/driver combination they selected, and the amount of the allocation.

By the third business day of each month, you will receive payment for that month's services. The Washington Metropolitan Area Transit Authority (WMATA) will electronically transfer the SmartBenefits allocated by your riders to the bank account you specified under the Admin/Account Maintenance function. Your monthly deposit will match the totals by driver on your final forecast report for the month. You can access the final forecast report at the bottom of the Acct Receivable page.

IMPORTANT

- Admin Users: Only users where their User ID has a System Usage of "User" can perform admin functions. The ID issued when the account was opened has admin capability.
- When you log in for the first time, please verify that your contact and banking information are correct. See the Other Administrative Functions section below.

SUPPORT

For support, send an email to smartbenefits@wmata.com. Please include your Customer ID in your email.

CONFIGURE YOUR ACCOUNT (admin users only)

To configure your account, you must add at least one operator number and then add a driver to it. Once configured, your riders can allocate their SmartBenefits to you.

The original User ID created for the account has account administration privileges. Login with that User ID and follow these steps to configure your account:

1. **Add Operator Numbers**
   a. Click **Operator# Maint** on the horizontal menu bar
   b. Click the **Add Operator Number** button
      i. In the Operator Number box, enter a number for a vehicle or location
      ii. In the Description box, enter the service offered
   c. Click **Add** and note the success message
   d. Click **Close**
   e. The operator number will appear on the Number List.

   Once a number is created, you can only edit the description.

To add additional vehicles or locations, click Add Operator Number and repeat the process.

2. **Use Admin to Add a Driver to Each Operator Number**
   a. Click **Admin** on the horizontal menu bar
   b. Click the **Add New User** button to create a User ID and temporary password for a driver.
      i. Use letters, numbers or a combination of both for the ID and the temporary password. The password is case sensitive.
      ii. Enter the first and last name of the driver. The remaining data fields are optional.
      iii. For System Usage, click the Driver/Transit Service radio button.
      iv. Select an Operator Number from the drop-down list.
      v. Click **Submit** and note the success message
      vi. Click **Admin** on the menu bar
      vii. The new Driver/Transit Service will be displayed on the User ID list.

   To add additional drivers, click “**Admin**” and repeat the process. Users with Driver/Transit system usage do not have access to the Operator# Maint and Admin pages. To add additional administrators, select “User” in step 2.b.iii above.

   Share the User ID and password with each of your drivers if you’d like them to run the passenger reports described in the Accounts Receivable section below.

   To view your list of drivers and/or users; click the down-arrow next to Type; click a selection; and click Search.

   To add additional administrators, follow the same process except for System Usage select User and for Operator Number you can select None.

OTHER ADMINISTRATIVE FUNCTIONS (admin users only)

<u>User/Driver ID Maintenance</u>

You can reset another user’s password, terminate a user or update the user’s information as follows:

- Click **Admin**
- Click **User Maintenance**
- Click the **User ID link** to open the page with the user’s detail.
- Enter a new password; click the Terminate radio button; and/or update the user info.
- Click **Submit**

<u>Contact and Banking Information Maintenance</u>

Please verify that the information that initially appears on this page matches the information you provided when you enrolled. You can edit this information at any time; however, modifications made to banking information during the first three business days of the month may not be used by our Treasury Department until the following month.

- Click **Admin**
- Click **Account Maintenance**
- Update the information as needed. Note: You must reenter the bank routing number and bank account number for all changes. Click the eye icon to reveal the bank account number. The bank Name on Acct and Bank Address are optional fields.
- Click **Save**

CHANGE PASSWORD (available to everyone)

Click **Change Password** to change your own password.

ACCOUNTS RECEIVABLE (available to everyone except as noted)

Click **Acct# Receivable** to access your passenger and revenue reports. There are three report options:

- Top of Page: Click the **Forecasting** button to see an up-to-date forecast of your passengers and revenue for the upcoming month. Click **Download** to download a .csv version of the report.
- Middle of Page: The operator number will default to the one associated with the drivers. Admin users can enter any operator number. Enter a month/year within the past 12 months and click **Report** to view an online report for that selection.
- Bottom of Page: Click on one of the **monthly links** to download a csv version of that month's report for your operator number (drivers) or all operator numbers (admin users). 12 months of history is available. The most recent month's report will be available on the 5th business day of the current month.