

SmartBenefits[®]

Commuter Benefits Program

ADVANCED
ADMINISTRATOR TRAINING

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Agenda

Commuting for Less with SmartBenefits®

SmartBenefits® Process Refresher

(Overview; Transit Pass Benefit; SmartBenefits Anytime)

News You Can Use

Customer Service

Q&A



Multiply the Savings

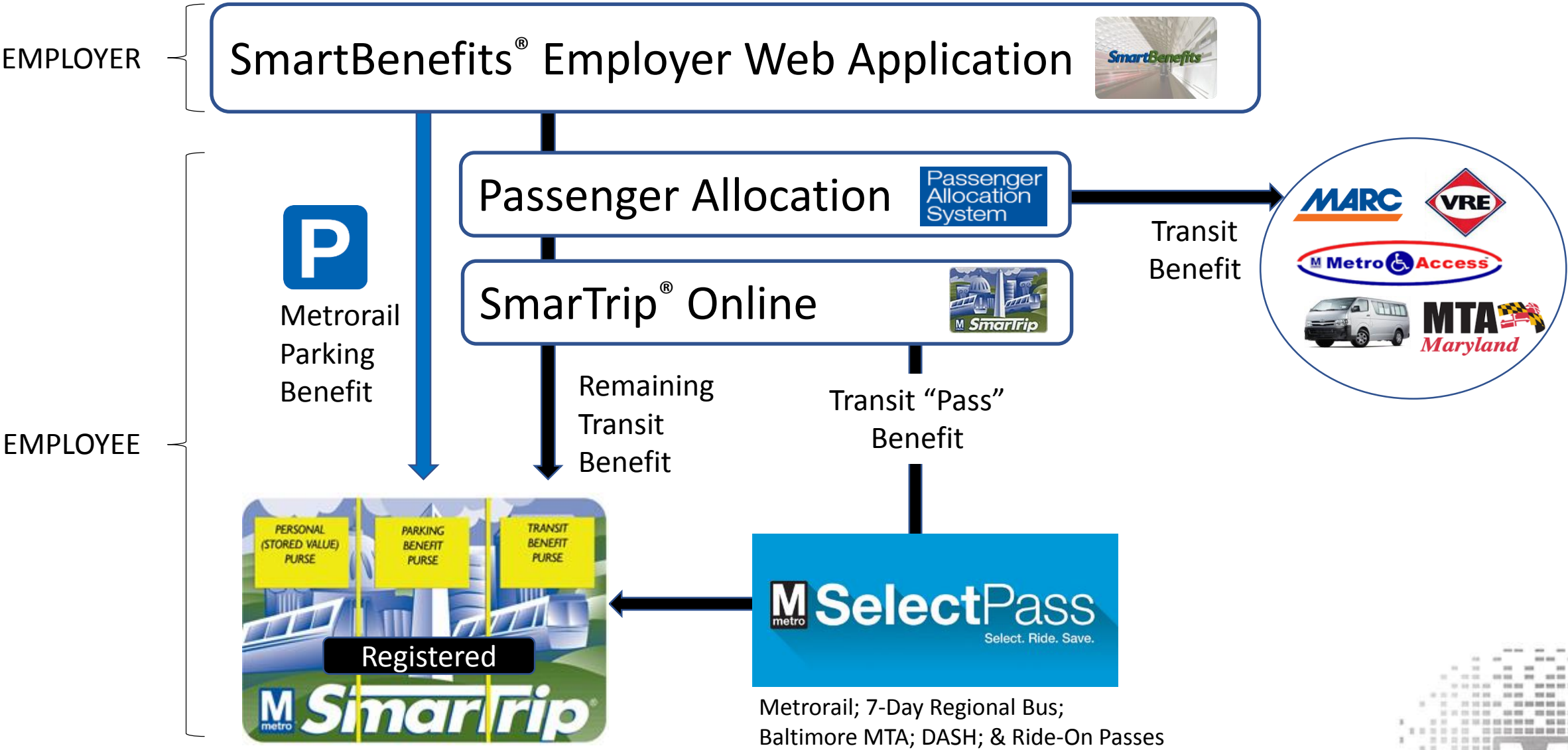
	PRIVATE SECTOR, STATE & LOCAL GOVT & NON-PROFITS		
	TRANSIT ONLY \$260 / MONTH	PARKING ONLY \$104 / MONTH	TRANSIT & PARK \$364 / MONTH
Annual Benefit or Payroll Deduction	\$ 3,120	\$ 1,248	\$ 4,368
FICA: Social Security Match 6.20%	(194)	(77)	(271)
FICA: Medicare Match 1.45%	(45)	(18)	(63)
Unemployment FUTA 0.60%	(19)	(7)	(26)
Unemployment SUTA 2.62%	(82)	(33)	(115)
EMPLOYER PER EMPLOYEE SAVINGS	\$ (340)	\$ (136)	\$ (476)

	TRANSIT ONLY \$260 / MONTH	PARKING ONLY \$104 / MONTH	TRANSIT & PARK \$364 / MONTH
Annual Benefit or Payroll Deduction	\$ 3,120	\$ 1,248	\$ 4,368
Federal Income Tax 22.00%	(686)	(275)	(961)
FICA: Social Security 6.20%	(194)	(77)	(271)
FICA: Medicare 1.45%	(45)	(18)	(63)
State Income Tax 7.00%	(219)	(87)	(306)
EMPLOYEE TAX SAVINGS	\$ (1,144)	\$ (457)	\$ (1,601)
Net Cost to Employee	\$ 1,976	\$ 791	\$ 2,767

- The more employees you enroll in SmartBenefits, the more you save
- Your account representative and local TDMs* can help you and your employees leverage public transit
<https://www.commuterconnections.org/employers/employer-resources/>
- Commuter Choice MD incentive
<https://mta.maryland.gov/commuter-programs>
- SmartBenefits complies with the DC Commuter Benefits Law

* TDM: Transportation Demand Management





SmarTrip® Online & Transit Pass Benefit

Used by Employees

Shopping Cart

Card Number: 002000000

Card Name: SmrtBnfts Test Card

Available SmartBenefits

Transit Pass: \$36.00

Card Management

» Card Summary


Order 1 of 1

Product	Code	Price	Total
7-Day Regional Bus Pass (Full Fare)	Mbus WkPass FF	\$17.50 Quantity: 1	\$17.50 Remove
<input type="checkbox"/> A Use Auto Reload to add a new pass 3 days before the current pass expires. (Learn More)			
Order Total:		\$17.50	Update
B SmartBenefits Transit Pass Charge:		\$17.50	(Learn more)
Credit Card Charge:		\$0.00	

Employer

- Create Transit Pass Benefit Type (specify rollover vs non-rollover)
- Assign Employees to It

Employee

- A cost-saving option
- Transit Benefits Automatically Added to Employee's SmarTrip Online Account
- Buy Eligible Metro Pass Products 
- Auto Reload Automates Pass Purchasing



Pro Tip: Save up to 20% with SelectPass

SelectPass Features

- Monthly Unlimited Metrorail Use
- Makes sense if you commute 18 or more days a month
- Minimum monthly savings if you commute 22 days a month
 - \$2.00 One-Way fare: **Save \$16**
 - \$6.00 One-Way fare: **Save \$48**
- SmartBenefits Transit Purse or Stored Value Purse automatically charged for fares above the price point (consider using auto reload to avoid a trip to the Exitfare machine)
- Learn more at wmata.com/selectpass



Available at SmarTrip Online



Anatomy of a SmarTrip® Card



Smartrip Payment Priority

1. Pass
2. SmartBenefits
 - a. Monthly Credits
 - b. Monthly Benefit
3. Personal Stored Value

Balance Display

- Faregates/boxes & parking gates show the balance of the purse used
- SmarTrip Online shows all balances
- Fare Vendors only show stored value balance




Important Dates

- Most Changes Limited to 1st thru 15th (11:59pm ET)
- Only Actions Allowed After the 15th
 - Suspend Benefits
 - Reassign Benefits
 - Distribute SmartBenefits Anytime Funds
- Order Deadline: 15th for most; 21st for some govt. agencies
(Deadline the same for weekends/holidays. System up 24/7.)
- Payment Due 1st Business Day After Your Order Deadline
(WMATA-Originated ACH Offers Automatic Payment Processing)



Administration

Do

- Use  to move between fields.
- Pick the proper benefit category type
- Use the Monthly Checklist
- Remind your employees to:
 - Register their SmarTrip cards
(including replacements for lost/damaged cards)
 - Update their Passenger Allocation System account with replacement card numbers
 - Tap their SmarTrip cards to claim benefits
 - Keep an eye on the order deadlines
 - Take advantage of wmata.com/smartbenefits For Employees page

Don't

- Change the Kickoff Date for existing employees
- Mark benefit categories in use as 'not eligible'
- Forget to Monitor Your Account
 - Login at least quarterly to:
 - Learn the latest SmartBenefits news
 - Change your password
 - Keep your email address up-to-date
(required for automatic password resets)
 - Review your benefits claimed reports
 - Suspend and/or Remove former employees
 - Alert employees with large rollover balances to adjust their benefits (no refunds)
 - Notify WMATA of changes to payment info



Pro Tip: SmartBenefits® Anytime

- Option to provide a transit or parking benefit after the normal SmartBenefits deadline to:
 - New or existing employees
 - Interns or other short-term employees
- SmartBenefits AnyTime funds remain available until used (like a bank account)
- Simple to Set-Up
 - Order anywhere from \$1 to \$10M in Anytime funds by the 15th of the month
 - The funds are available for use on the 1st day of the next month
 - Assign to employee SmarTrip® cards as either rollover or non-rollover for both transit and parking benefit types
 - Typically takes 2-3 days to load to your employee's SmarTrip card



Metro Rider Changes & SmartBenefits®

No More Negative Balances (1/8/18)

- SmartBenefits are not accessible if your personal stored value balance is negative
- DASH Bus still let's riders go negative

Rush Hour Promise (1/26/18)

- SmartBenefits credit applied on the first of each month for rush hour trips > 15 mins late
- Restrictions apply. Visit wmata.com/promise

Non-Rider Parking Fee Increase (2/5/18)

- You must use the same SmarTrip card to travel Metrorail and pay for parking to enjoy the rider fee
- Visit wmata.com/parking



We are here to help

Online

- Customer Support & FAQ
<https://www.wmata.com/business/smartbenefits/faq.cfm>

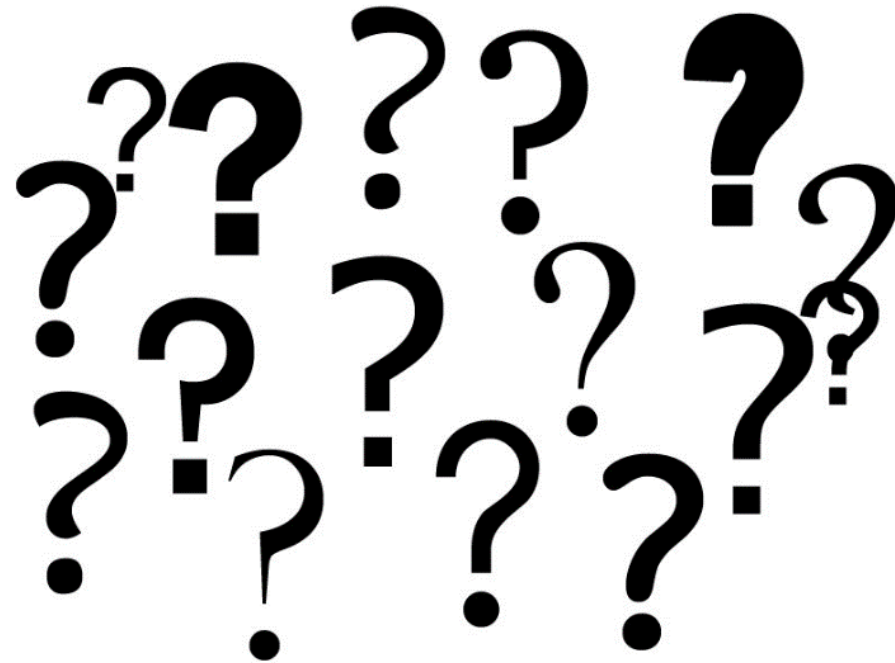
SmarTrip Customer Support

- Employers: 202-962-1326 (have your SB account # ready)
- Employees: 1-888-SMARTRIP (have your ST card # ready)
- email: smartrip@wmata.com
- Hours: 7 AM - 8 PM ET Monday – Friday

SmartBenefits Account Representatives



Questions



Thank you for your time

SmartBenefits[®]

Smart for Employers.
Smart for Employees.
Smart for You.



wmata.com/smartbenefits

smartbenefits@wmata.com

