# Employer Software Upgrade

WEBINAR – June & July 2018

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# Agenda

- Overview of Improvements
- Side-by-Side Comparison of Key Screens (note the navigation instructions at the top of each slide)
- Q&A on Any SmartBenefits Topic



# Overview of Improvements

- Basic Concepts
  - Make it More Intuitive
  - Reduce Data Entry
  - Reduce the Risk for Errors
  - Invest in the Future
- Key Changes
  - Greater visibility to Benefit Category enrollments and amounts
  - Consolidated actions on the Employee Enrollment Screen
  - More summary screen filters and scrolling instead of paging
- Invest in the Future
  - Migrated the code to Java

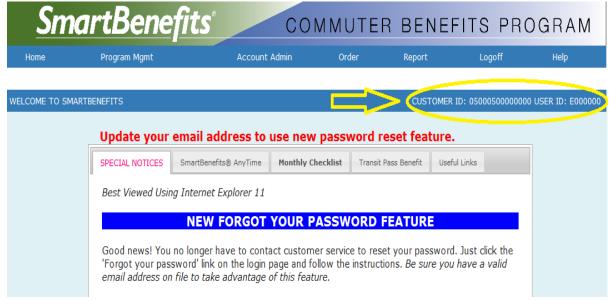


#### **Home Page**

#### **JULY 13**



#### **JULY 14**





6/22/2018

## **Program Mgmt/Benefit Category**





Displaying 1 to 117 of total 117 records

- Moved Updated By and Updated Timestamp to detail screen (click Benefit Category # to see it)
- Added Enrolled column: Mark Benefit Category as Not Eligible only if enrolled count is zero (click # to see who is assigned)
- Added Amount column: Actual total benefit amount (use as a check vs the description)
- Categories with no amount highlighted in red.
- Scrolling instead of Next Paging



## **Program Mgmt/Benefit Category/Click Benefit Category Link from Summary**

#### **JULY 13**



#### Benefit Category/Amount Modification Process CUSTOMER ID: 050005000000000

#### MODIFY BENEFIT CATEGORY

Enter or edit the SmartBenefits benefit category information in the following fields. Be sure to click **Save** when you're done.

Category Type: T100
Category Description: Transit Benefit \$100
Category Status: ● Eligible ○ Not Eligible

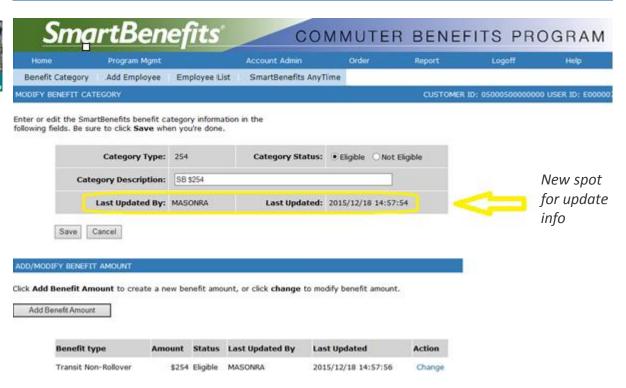
Save Cancel

#### ADD/MODIFY BENEFIT AMOUNT

Click **Add Benefit Amount** to create a new benefit amount, or click **change** to modify benefit amount.

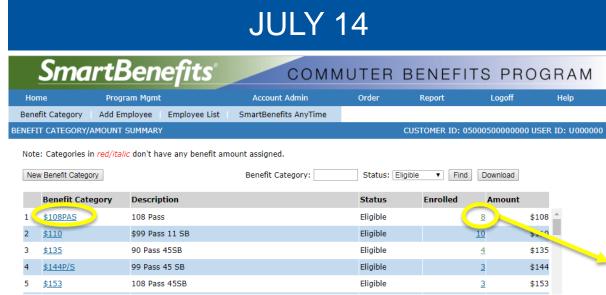
Add Benefit An	nount				
Benefit type	Amount	Status	Update User	Update Timestamp	Action
Transit Non- Rollover	\$100.00	Not Eligible	ARUCKER	04/10/2018 15:42:39	change
Transit Rollover	\$100.00	Eligible	ARUCKER	04/10/2018 15:41:41	change

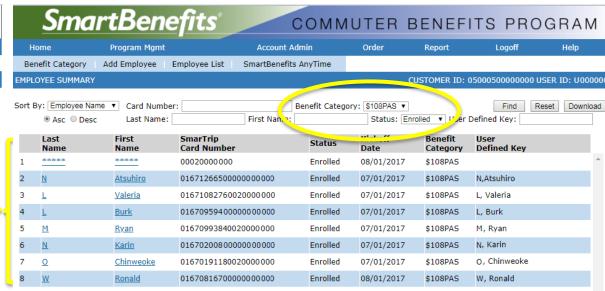
#### **JULY 14**





# **Program Mgmt/Benefit Category/Click Enrolled # from Summary**





- Click Enrolled # to see who is enrolled in that benefit category
- For a complete history, change the Status to see Removed, On Hold, or All employees assigned to that benefit category
- Reassign all Enrolled employees to other benefit categories if you want to make the current benefit category Not Eligible Otherwise, you'll receive an error message.



# **Program Mgmt/Employee List**

#### **JULY 13 JULY 14 SmartBenefits** COMMUTER BENEFITS PROGRAM Account Admin Report Benefit Category Add Employee Employee List SmartBenefits AnyTime Create Benefit Amount Add Employee Employee List Reassign Benefits SmartBenefits AnyTime **SmartBenefits Administration Summary** MPLOYEE SUMMARY CUSTOMER ID: 05000500000000 USER ID: E0000 CUSTOMER ID: 050005000000000 EMPLOYEE SUMMARY ADD EMPLOYEE | ADD BENEFIT CATEGORIES | DOWNLOAD EMPLOYEE LIST Sort By: Employee Name ♥ Reset Download Card Number: Benefit Category: Sort By: SmarTrip Card-Name V Asc O Desc Status: Enrolled Y User Defined Key: Last Name: First Name: Status: Enrolled V Find When you choose a sort option, the program will automatically sort and display the information for you. SmarTrip Card number First SmarTrip Kickoff Last User Status **Card Number Defined Key** Date Updated Date Benefits Benefits Reassign Defined 04/10/2018 \*\*\*\*\* 01670167016701670167 Enrolled 07/01/2017 144P/S8 Cat, Viktoria 012885829 Enrolled 05/01/2018 TP360 Rucker ARUCKE 14:50:17 04/10/2018 01671016101610161016 loan Enrolled 01/01/2017 175 Aar, Joan Alfonza 000300004 Enrolled 05/01/2018 T260 ARUCKER

- More Employee Summary sorting and filtering features
- Moved Timestamp, Benefits Assigned, Benefits Claimed, Reassignment Inquiry to employee management screen



# **Program Mgmt/Employee List/Click Employee Name**

#### **JULY 13**

#### Employee Enrollment Modification Process CUSTOMER ID: 050005000000000

SmarTrip Card Number: First Name:Alfonza Middle Initial:	
Last Name: Watson, JR.	
Status: ● Enrolled ○ Removed ○ On Hold	
Kickoff Date: 05/01/2018 (mm/dd/yyyy)	
Benefit Category T260 - Transit \$260	~
User Defined Key:	

Select 'On Hold' for continuous access to remaining rollover funds when employee is NOT receiving monthly benefits for a temporary period.



#### **JULY 14 SmartBenefits** COMMUTER BENEFITS PROGRAM Account Admin Logoff Benefit Category Add Employee Employee List SmartBenefits AnyTime MPLOYEE ENROLLMENT MODIFICATION CUSTOMER ID: 05000500000000 USER ID: E00 Change an employee's status to On Hold by the monthly order deadline to temporarily prevent the employee from receiving future benefits. Do not change the Kickoff Date. While On Hold, the employee may use their rollover benefits. SmarTrip Card: 01671016101610161016 Name: Aar, Joan Kickoff Date: 01/01/2017 Benefit Status: Forolled Removed On Hold (mm/dd/yyyy) Do not backdate Benefit Category: 175 - SB \$175 User Key (opt.): Aar. Joan Do not use <>=() Last Updated By: PINK Last Updated: 2017/04/06 08:39:52 Current Month Report Save Cancel BENEFITS (8) CLAIMS (6) REASSIGN (1) SUSPENDIRESTORE (5) Remaining Benefit Type **Expiration Date** Transit Non-Rollover 07/01/2017 08/01/2017 89.60 Expired Transit Non-Rollover 06/01/2017 07/01/2017 175.00 78.60 Expired

- Consolidated employee management into one screen
- Click the Current Month Report button to see this employee's benefits/claims activity (replaces same feature on report screen ... saves typing)
- · Click on Benefits, Claims, Reassign or Suspend/Restore to see data or use the feature

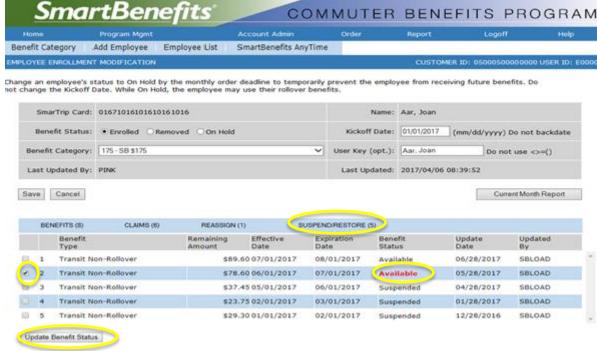


## Program Mgmt/Employee List/Click Employee Name/Click Reassign or Suspend/Restore

# Reassign from Lost/Dmgd to New Card



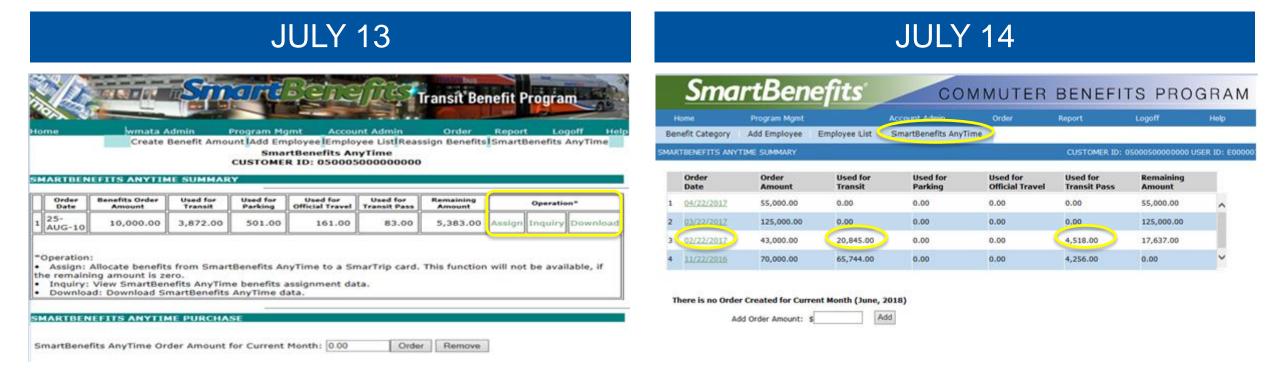
## Suspend/Restore Benefits



- Reassign: Only key in the new card number
- Suspend/Restore: Click the checkbox to toggle between Available or Suspended for review. Then click Update Benefit Status.



# **Program Mgmt/SmartBenefits AnyTime**

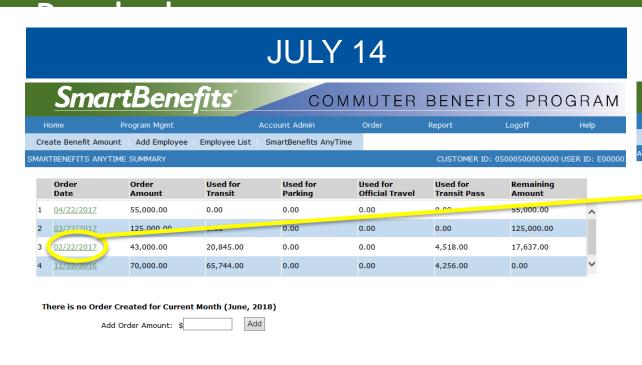


#### **IMPROVEMENTS**

• Click on an Order Date where benefits have been used to make a new SmartBenefits AnyTime assignment, see the list of prior assignments (was Inquiry) and to download that data.



# **Program Mgmt/SmartBenefits Anytime/Click Order Date**

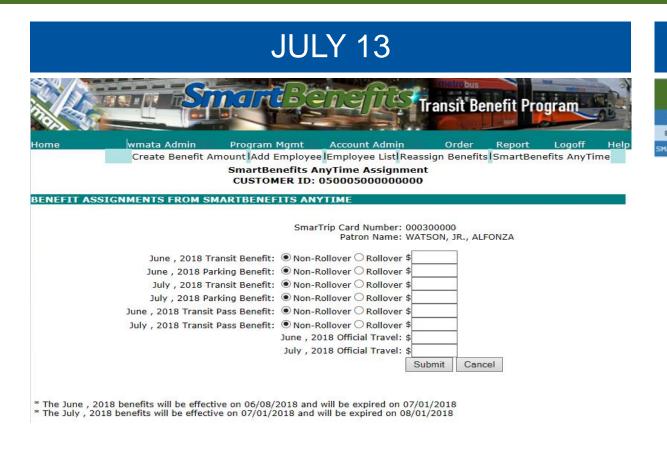




- Assign AnyTime Funds: Enter an enrolled SmarTrip card and click Find.
- Click Download to get your AnyTime assignment list for analysis.



## Program Mgmt/SmartBenefits AnyTime/Click Order Date/Enter Card #/Click Find



#### **JULY 14 SmartBenefits** COMMUTER BENEFITS PROGRAM Order Add Employee SmartBenefits AnyTime MARTBENEFITS ANYTIME BENEFIT ASSIGN CUSTOMER ID: 05000500000000 USER ID: E0000 SmartBenefits AnyTime Order Order Number: 383777 Remaining Amount: 1,735.00 Order Amount: 2,500.00 Assign to Smartrip Card Card Number: 0167016701670160167 Cardholder Name: Five, Wmata Test **Expires** (\$1-\$999) Jun, 2018 (Available 06/22/2018) Transit \* Yes No 10 07/01/2018 Parking 07/01/2018 Transit Pass N/A Official Trave Jul, 2018 (Available 07/01/2018) Transit \* Yes No 08/01/2018 Parking 08/01/2018 \* Yes No Transit Pass 08/01/2018 \* Yes No Official Travel Cancel

- Remaining Amount is displayed,
- Expiration date changes to N/A if 'No Non-Rollover' is selected. (Rollover = No Expiration)



#### **JULY 13**



#### **JULY 14**

Moved to Employee Enrollment Screen (saves typing - see Slide # 10)

Moved to Benefits
Authorization Screen



# **Spreadsheet Downloads**

#### **JULY 13**

# Numbers that started with zero looked like this in .csv downloads

114	CUSTOMER NUMBER
115	5.0005E+12
116	5.0005E+12
117	5.0005E+12
118	5.0005E+12
119	5.0005E+12

1	CARD SERIAL#
2	1.67028E+18
3	1.67028E+18
4	1.67028E+18
5	1.67028E+18

#### JULY 14

Customer numbers and SmarTrip card numbers now display the leading zero.

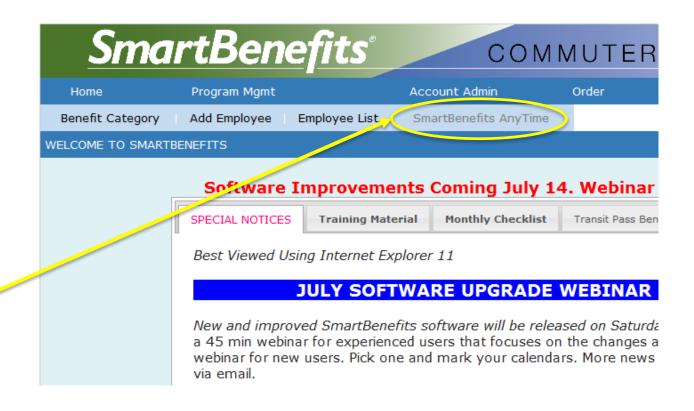


## SmartBenefits Anytime: Greyed Out if Option is 'No'

#### JULY 14 Administrator Modify Account Change Password MODIFY ACCOUNT CUSTOMER ID: 05000 Welcome to SmartBenefits®. This is how your account is set up. If you wish to make any changes, please key in the new informatic and press the Save buttom. Note: Changes can only be made by user manager. All orders must be placed no later than midnight of the 15th of each month. After the 15th of the month, orders cannot be changed increased or decreased. **Customer Information** Acct #: 05000500000000 Ship to same address? Business Name: Test ● Yes ○ No - Ship to Below Address Instead Address: 20 Test Street Address: City: Alexandria City: State: VA - VIRGINIA State: Zip: 22314 Zip: Contact: Jim Bongiorno Test Contact: Phone: 703-254-9999 Phone: Fax: 703-254-9997

E-mail: libongiorno@wmata.com

SmartBenefits® AnyTime Option: ○Yes ● No





# No significant functionality changes to remaining screens.

# Questions?



# Thank You



