

Employer Software Upgrade

WEBINAR – June & July 2018

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SmartBenefits[®]

FREE COMMUTER BENEFITS PROGRAM

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




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

JULY 13



Home Program Mgmt Account Admin Order Report Logoff Help

Software Improvements Coming July 14. Webinar details below.

SPECIAL NOTICES Training Material Monthly Checklist Transit Pass Benefit Useful Links


Best Viewed Using Internet Explorer 11

JULY SOFTWARE UPGRADE WEBINAR SCHEDULE

New and improved SmartBenefits software will be released on Saturday, July 14. We've developed a 45 min webinar for experienced users that focuses on the changes and a 90 min soup-to-nuts webinar for new users. Pick one and mark your calendars. More news including Skype links to follow via email.

Experienced Users: 6/27 3:30pm ET -or- 7/18 11:00am ET -or- 7/31 2:00pm ET (45 min)
New Users: 7/12 8:30am ET -or- 7/25 1:00pm ET (90 min)

JULY 14



Home Program Mgmt Account Admin Order Report Logoff Help

WELCOME TO SMARTBENEFITS

Update your email address to use new password reset feature.

SPECIAL NOTICES SmartBenefits® AnyTime Monthly Checklist Transit Pass Benefit Useful Links

Best Viewed Using Internet Explorer 11

NEW FORGOT YOUR PASSWORD FEATURE

Good news! You no longer have to contact customer service to reset your password. Just click the 'Forgot your password' link on the login page and follow the instructions. *Be sure you have a valid email address on file to take advantage of this feature.*

CUSTOMER ID: 05000500000000 USER ID: E000000

JULY 13

SmartBenefits Transit Benefit Program

Home Program Mgmt Account Admin Order Report Logoff Help

Create Benefit Amount Add Employee Employee List Reassign Benefits SmartBenefits AnyTime

SmartBenefits Benefit Category/Amount Summary
CUSTOMER ID: 050005000000000

BENEFIT CATEGORY/AMOUNT SUMMARY

New Benefit Category Benefit Category: Status: All

Category Type	Category Description	Status	Updated By	Updated Timestamp
1 T100	Transit Benefit \$100	Eligible	ARUCKER	04/10/2018 14:30:53
2 T260	Transit \$260	Eligible	ARUCKER	04/10/2018 14:39:20
3 TP360	Transit Benefit \$260 and Parking Benefit \$100	Eligible	ARUCKER	04/10/2018 14:32:28
4 TPSP250	Transit \$42.00 Transit Pass \$108 Parking \$100	Eligible	ARUCKER	04/10/2018 14:37:50

IMPROVEMENTS

- 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

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SmartBenefits COMMUTER BENEFITS PROGRAM

Home Program Mgmt Account Admin Order Report Logoff Help

Benefit Category Add Employee Employee List SmartBenefits AnyTime

BENEFIT CATEGORY/AMOUNT SUMMARY
CUSTOMER ID: 050005000000000 USER ID: E000000

Note: Categories in *red/italic* don't have any benefit amount assigned.

Benefit Category: Status: All

Benefit Category	Description	Status	Enrolled	Amount
1 <i>A:B</i>	<i>12345</i>	<i>Eligible</i>	0	\$0
2 <i>\$75</i>	Transit Parking Transit Pass \$15	Eligible	0	\$1,014
3 <i>000</i>	parking \$40 and transit \$55	Eligible	3	\$117
4 <i>00003</i>	<i>Test Benefit</i>	<i>Eligible</i>	0	\$0
5 <i>001</i>	AFC TECH Test Benefit \$1.00	Eligible	90	\$45

Displaying 1 to 117 of total 117 records

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

JULY 13



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:	<input checked="" type="radio"/> Eligible <input type="radio"/> Not Eligible
<div>Save Cancel</div>	

ADD/MODIFY BENEFIT AMOUNT

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

Add Benefit Amount					
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



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

Category Type:	254	Category Status:	<input checked="" type="radio"/> Eligible <input type="radio"/> Not Eligible
Category Description:	SB \$254		
Last Updated By:	MASONRA	Last Updated:	2015/12/18 14:57:54
<div>Save Cancel</div>			

New spot for update info

ADD/MODIFY BENEFIT AMOUNT

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

Add Benefit Amount					
Benefit type	Amount	Status	Last Updated By	Last Updated	Action
Transit Non-Rollover	\$254	Eligible	MASONRA	2015/12/18 14:57:56	Change

Program Mgmt/Benefit Category/Click Enrolled # from Summary

JULY 14

SmartBenefits COMMUTER BENEFITS PROGRAM

Home Program Mgmt Account Admin Order Report Logoff Help

Benefit Category | Add Employee | Employee List | SmartBenefits AnyTime

BENEFIT CATEGORY/AMOUNT SUMMARY CUSTOMER ID: 05000500000000 USER ID: U000000

Note: Categories in *red/italic* don't have any benefit amount assigned.

New Benefit Category Benefit Category: Status: Eligible Find Download

	Benefit Category	Description	Status	Enrolled	Amount
1	\$108PAS	108 Pass	Eligible	8	\$108
2	<i>\$110</i>	\$99 Pass 11 SB	Eligible	10	\$110
3	<i>\$135</i>	90 Pass 45SB	Eligible	4	\$135
4	<i>\$144P/S</i>	99 Pass 45 SB	Eligible	3	\$144
5	<i>\$153</i>	108 Pass 45SB	Eligible	3	\$153

SmartBenefits COMMUTER BENEFITS PROGRAM

Home Program Mgmt Account Admin Order Report Logoff Help

Benefit Category | Add Employee | Employee List | SmartBenefits AnyTime

EMPLOYEE SUMMARY CUSTOMER ID: 05000500000000 USER ID: U000000

Sort By: Employee Name Card Number: Benefit Category: \$108PAS Find Reset Download
Asc Desc Last Name: First Name: Status: Enrolled User Defined Key:

	Last Name	First Name	SmartTrip Card Number	Status	Enroll Date	Benefit Category	User Defined Key
1	*****	*****	000200000000	Enrolled	08/01/2017	\$108PAS	
2	N	Atsuhiro	01671266500000000000	Enrolled	07/01/2017	\$108PAS	N,Atsuhiro
3	L	Valeria	01671082760020000000	Enrolled	07/01/2017	\$108PAS	L, Valeria
4	L	Burk	01670959400000000000	Enrolled	07/01/2017	\$108PAS	L, Burk
5	M	Ryan	01670993840020000000	Enrolled	07/01/2017	\$108PAS	M, Ryan
6	N	Karin	01670200800000000000	Enrolled	07/01/2017	\$108PAS	N, Karin
7	O	Chinweoke	01670191180020000000	Enrolled	07/01/2017	\$108PAS	O, Chinweoke
8	W	Ronald	01670816700000000000	Enrolled	08/01/2017	\$108PAS	W, Ronald

- 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.

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SmartBenefits Transit Benefit Program

Home Wmata Admin Program Mgmt Account Admin Order Report Logoff Help

Create Benefit Amount Add Employee Employee List Reassign Benefits SmartBenefits AnyTime

SmartBenefits Administration Summary
CUSTOMER ID: 050005000000000

EMPLOYEE SUMMARY

Sort By: SmartTrip Card-Name

ADD EMPLOYEE | ADD BENEFIT CATEGORIES | DOWNLOAD EMPLOYEE LIST

When you choose a sort option, the program will automatically sort and display the information for you.

SmartTrip Card number: Status: Enrolled Find

Last Name	First Name	SmartTrip Card Number	Status	Kickoff Date	Benefit Category	User Defined Key	Updated By	Updated Date	Benefits Assigned	Benefits Claimed	Reassignment Inquiry
1	*****	012885829	Enrolled	05/01/2018	TP360	Rucker	ARUCKER	04/10/2018 14:50:17			
2	Watson, Jr.	Alfonza	000300004	Enrolled	05/01/2018	T260	ARUCKER	04/10/2018 14:50:48			

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SmartBenefits COMMUTER BENEFITS PROGRAM

Home Program Mgmt Account Admin Order Report Logoff Help

Benefit Category Add Employee Employee List SmartBenefits AnyTime

EMPLOYEE SUMMARY CUSTOMER ID: 050005000000000 USER ID: E00000

Sort By: Employee Name Card Number: Benefit Category: Find Reset Download

Asc Desc Last Name: First Name: Status: Enrolled User Defined Key:

Last Name	First Name	SmartTrip Card Number	Status	Kickoff Date	Benefit Category	User Defined Key
44	*****	01670167016701670167	Enrolled	07/01/2017	144P/SB	Cat, Viktoria
45	Aar	Joan	01671016101610161016	Enrolled	01/01/2017	175 Aar, Joan

IMPROVEMENTS

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

JULY 13

Employee Enrollment Modification Process

CUSTOMER ID: 050005000000000

SmarTrip Card Number:	000300000
First Name:	Alfonza
Middle Initial:	
Last Name:	Watson, JR.
Status:	<input checked="" type="radio"/> Enrolled <input type="radio"/> Removed <input type="radio"/> On Hold
Kickoff Date:	05/01/2018 (mm/dd/yyyy)
Benefit Category:	T260 - Transit \$260
Type:	
User Defined Key:	

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

Click this button to suspend/restore the benefits.

IMPROVEMENTS

- 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

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Home Program Mgmt Account Admin Order Report Logoff Help

Benefit Category Add Employee Employee List SmartBenefits AnyTime

EMPLOYEE ENROLLMENT MODIFICATION

CUSTOMER ID: 050005000000000 USER ID: E00000

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:	0167101610161016	Name:	Aar, Joan
Benefit Status:	<input checked="" type="radio"/> Enrolled <input type="radio"/> Removed <input type="radio"/> On Hold	Kickoff Date:	01/01/2017 (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

BENEFITS (8)		CLAIMS (6)		REASSIGN (1)		SUSPEND/RESTORE (5)		
Benefit Type	Effective Date	Expiration Date	Initial Amount	Reassigned Amount (In)	Reassigned Amount (Out)	Claimed Amount	Remaining Amount	Status
1 Transit Non-Rollover	07/01/2017	08/01/2017	175.00	0.00	0.00	85.40	89.60	Expired
2 Transit Non-Rollover	06/01/2017	07/01/2017	175.00	0.00	0.00	96.40	78.60	Expired

BENEFITS (8)		CLAIMS (6)	REASSIGN (1)	SUSPEND/RESTORE (5)		
		Smartrip Card Number	Benefit Type	Amount	Updated Date	Updated By
1	From		SmartBenefits AnyTime	211.00	12/09/2016 11:47:26	PECKG

Enter The New Smartrip Card Number:

- 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.

Suspend/Restore Benefits

BENEFITS (8)		CLAIMS (6)	REASSIGN (1)		SUSPEND/RESTORE (5)		
	Benefit Type	Remaining Amount	Effective Date	Expiration Date	Benefit Status	Update Date	Updated By
<input type="checkbox"/>	1 Transit Non-Rollover		\$89.60 07/01/2017	08/01/2017	Available	06/28/2017	SBLOAD
<input checked="" type="checkbox"/>	2 Transit Non-Rollover		\$78.60 06/01/2017	07/01/2017	Available	05/28/2017	SBLOAD
<input type="checkbox"/>	3 Transit Non-Rollover		\$37.45 05/01/2017	06/01/2017	Suspended	04/28/2017	SBLOAD
<input type="checkbox"/>	4 Transit Non-Rollover		\$23.75 02/01/2017	03/01/2017	Suspended	01/28/2017	SBLOAD
<input type="checkbox"/>	5 Transit Non-Rollover		\$29.30 01/01/2017	02/01/2017	Suspended	12/28/2016	SBLOAD

Update Benefit Status

JULY 13

SmartBenefits AnyTime
CUSTOMER ID: 0500050000000000

Order Date	Benefits Order Amount	Used for Transit	Used for Parking	Used for Official Travel	Used for Transit Pass	Remaining Amount	Operation*
25-AUG-10	10,000.00	3,872.00	501.00	161.00	83.00	5,383.00	Assign Inquiry Download

SmartBenefits AnyTime Order Amount for Current Month: 0.00 [Order] [Remove]

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.

JULY 14

SmartBenefits AnyTime
CUSTOMER ID: 0500050000000000

Order Date	Order Amount	Used for Transit	Used for Parking	Used for Official Travel	Used for Transit Pass	Remaining Amount
04/22/2017	55,000.00	0.00	0.00	0.00	0.00	55,000.00
03/22/2017	125,000.00	0.00	0.00	0.00	0.00	125,000.00
02/22/2017	43,000.00	20,845.00	0.00	0.00	4,518.00	17,637.00
11/22/2016	70,000.00	65,744.00	0.00	0.00	4,256.00	0.00

There is no Order Created for Current Month (June, 2018)

Add Order Amount: \$ [] [Add]

Program Mgmt/SmartBenefits Anytime/Click Order Date

JULY 14

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COMMUTER BENEFITS PROGRAM

Home Program Mgmt Account Admin Order Report Logoff Help

Create Benefit Amount Add Employee Employee List SmartBenefits AnyTime

SMARTBENEFITS ANYTIME SUMMARY

CUSTOMER ID: 05000500000000 USER ID: E00000

	Order Date	Order Amount	Used for Transit	Used for Parking	Used for Official Travel	Used for Transit Pass	Remaining Amount
1	04/22/2017	55,000.00	0.00	0.00	0.00	0.00	55,000.00
2	03/22/2017	125,000.00	0.00	0.00	0.00	0.00	125,000.00
3	02/22/2017	43,000.00	20,845.00	0.00	0.00	4,518.00	17,637.00
4	11/22/2016	70,000.00	65,744.00	0.00	0.00	4,256.00	0.00

There is no Order Created for Current Month (June, 2018)

Add Order Amount: \$

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COMMUTER BENEFITS PROGRAM

Home Program Mgmt Account Admin Order Report Logoff Help

Benefit Category Add Employee Employee List SmartBenefits AnyTime

ANYTIME ORDER ASSIGNMENT

CUSTOMER ID: 05000500000000 USER ID: U000000

Order Date:	02/22/2017	Order Number:	500000
Order Amount:	43,000.00	Remaining Amount:	17,637.00
Used for Transit:	20,845.00	Used for Parking:	0.00
Used for Official Travel:	0.00	Used for Transit Pass:	4,518.00

Last Name	First Name	Smartrip Card	Benefit Type	Effective Date	Benefit Amount	Remain Amount
7	*****	01670000000000000002	Transit Non-Rollover	07/06/2017	152.00	152.00
8	*****	01670000000000000008	Transit Non-Rollover	07/05/2017	86.00	86.00
9	*****	01670000000000000009	Transit Non-Rollover	07/05/2017	160.00	160.00
10	*****	01670000000000000006	Transit Non-Rollover	07/05/2017	44.00	44.00
11	Ad	01670000000000000000	Transit Non-Rollover	07/05/2017	55.00	39.00
12	Ak	01670000000000000003	Transit Non-Rollover	07/05/2017	90.00	65.70
13	Am	01670000000000000004	Transit Non-Rollover	07/03/2017	168.00	165.60

SmartBenefits Enrolled Smartrip Card #:

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

JULY 13



Home | Wmata Admin | Program Mgmt | Account Admin | Order | Report | Logoff | Help

Create Benefit Amount | Add Employee | Employee List | Reassign Benefits | SmartBenefits AnyTime

SmartBenefits AnyTime Assignment
CUSTOMER ID: 050005000000000

BENEFIT ASSIGNMENTS FROM SMARTBENEFITS ANYTIME

SmarTrip Card Number: 000300000
Patron Name: WATSON, JR., ALFONZA

June , 2018 Transit Benefit: ☒ Non-Rollover ☐ Rollover \$

June , 2018 Parking Benefit: ☒ Non-Rollover ☐ Rollover \$

July , 2018 Transit Benefit: ☒ Non-Rollover ☐ Rollover \$

July , 2018 Parking Benefit: ☒ Non-Rollover ☐ Rollover \$

June , 2018 Transit Pass Benefit: ☒ Non-Rollover ☐ Rollover \$

July , 2018 Transit Pass Benefit: ☒ Non-Rollover ☐ Rollover \$

June , 2018 Official Travel: \$

July , 2018 Official Travel: \$

* The June , 2018 benefits will be effective on 06/08/2018 and will be expired on 07/01/2018
* The July , 2018 benefits will be effective on 07/01/2018 and will be expired on 08/01/2018

IMPROVEMENTS

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

JULY 14



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Benefit Category | Add Employee | Employee List | SmartBenefits AnyTime

SMARTBENEFITS ANYTIME BENEFIT ASSIGN CUSTOMER ID: 050005000000000 USER ID: E00000

SmartBenefits AnyTime Order

Order Date: 06/22/2014	Order Number: 383777
Order Amount: 2,500.00	Remaining Amount: 1,735.00

Assign to SmarTrip Card

Card Number: 0167016701670167	Cardholder Name: Five, Wmata Test
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Month	Type	Non-Rollover	Amount (\$1-\$999)	Expires
Jun, 2018 (Available 06/22/2018)				
	Transit	* Yes <input type="radio"/> No <input checked="" type="radio"/>	10	07/01/2018
	Parking	* Yes <input type="radio"/> No <input checked="" type="radio"/>	10	07/01/2018
	Transit Pass	<input type="radio"/> Yes * No <input checked="" type="radio"/>	10	N/A
	Official Travel			
Jul, 2018 (Available 07/01/2018)				
	Transit	* Yes <input type="radio"/> No <input checked="" type="radio"/>		08/01/2018
	Parking	* Yes <input type="radio"/> No <input checked="" type="radio"/>		08/01/2018
	Transit Pass	* Yes <input type="radio"/> No <input checked="" type="radio"/>		08/01/2018
	Official Travel			

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Benefit Authorization | **Benefits Claimed This Month** | Benefits Claimed

Benefits Claimed / Unclaimed Current Month
CUSTOMER ID: 050005000000000

The benefits / claims activity report for all employees in your organization are available for download from [Benefits Claimed Previous Months](#) after the current month is over, as a previous month's report.

Enter the employee's SmarTrip card number to view the benefits / claims activity report for the current month.

SmarTrip Card:

OR

Click on [Unclaimed Benefit Report](#) to view unclaimed benefits for the current month.
Note: This report will be available beginning 7th of each month

JULY 14

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

Moved to Benefits Authorization Screen

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: 050005

Welcome to SmartBenefits®. This is how your account is set up. If you wish to make any changes, please key in the new information and press the **Save** button. 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		
Business Name:	<input type="text" value="Test"/>	Ship to same address?	<input checked="" type="radio"/> Yes <input type="radio"/> No - Ship to Below Address Instead
Address:	<input type="text" value="20 Test Street"/>	Address:	<input type="text"/>
City:	<input type="text" value="Alexandria"/>	City:	<input type="text"/>
State:	<input type="text" value="VA - VIRGINIA"/>	State:	<input type="text"/>
Zip:	<input type="text" value="22314"/>	Zip:	<input type="text"/>
Contact:	<input type="text" value="Jim Bongiorno Test"/>	Contact:	<input type="text"/>
Title:	<input type="text"/>		
Phone:	<input type="text" value="703-254-9999"/>	Phone:	<input type="text"/>
Fax:	<input type="text" value="703-254-9997"/>	Fax:	<input type="text"/>
E-mail:	<input type="text" value="jbongiorno@wmata.com"/>		

SmartBenefits® AnyTime Option: ☐ Yes ☒ No

SmartBenefits® COMMUTER

Home Program Mgmt Account Admin Order

Benefit Category Add Employee Employee List **SmartBenefits AnyTime**

WELCOME TO SMARTBENEFITS

Software Improvements Coming July 14. Webinar

SPECIAL NOTICES Training Material Monthly Checklist Transit Pass Ben

Best Viewed Using Internet Explorer 11

JULY SOFTWARE UPGRADE WEBINAR

New and improved SmartBenefits software will be released on Saturday, July 14, 2018. Join us for a 45 min webinar for experienced users that focuses on the changes a webinar for new users. Pick one and mark your calendars. More news via email.

No significant functionality
changes to remaining screens.

Questions?

Thank You

