# 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.

**M** metro

# 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

Washington Metropolitan Area Transit Authority

# 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



## JULY 14

# Program Mgmt/Benefit Category



## JULY 13

## JULY 14

## 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

## JULY 13



## JULY 14



*New spot for update info*

JULY 14

- 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

## 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: ● Enrolled ○ Removed ○ On Hold
Kickoff Date: 05/01/2018 (mm/dd/yyyy)
Benefit Category Type: 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.

[ Save ] [ Reset ] [ Close ]

Click this [ Suspend/Restore Benefits ] button to suspend/restore the benefits.

## JULY 14

**SmartBenefits** COMMUTER BENEFITS PROGRAM

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

Benefit Category | Add Employee | Employee List | SmartBenefits AnyTime

EMPLOYEE ENROLLMENT MODIFICATION          CUSTOMER ID: 05000500000000 USER ID: E0000

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
Benefit Status: ● Enrolled ○ Removed ○ 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

[ Save ] [ Cancel ]          [ Current Month Report ]

BENEFITS (8)   CLAIMS (6)   REASSIGN (1)   SUSPEND/RESTORE (5)

| | Benefit Type | Effective Date | Expiration Date | Initial Amount | Reassigned Amount (In) | (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 |

## 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

## Reassign from Lost/Dmgd to New Card



## Suspend/Restore Benefits



IMPROVEMENTS
- 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.

## JULY 13

## JULY 14

## 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.

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

## IMPROVEMENTS

- 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**

## JULY 13

## JULY 14

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 |

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

No significant functionality
changes to remaining screens.

# Questions?

# Thank You

Washington Metropolitan Area Transit Authority

6/22/2018