

Suspend / Restore Benefits

WEBINAR – MARCH 8, 2018

Al Watson & Jim Bongiorno



SmartBenefits[®]

FREE COMMUTER BENEFITS PROGRAM

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



Agenda

- Suspend / Restore Benefits Process
- Q&A (any topic)
- Poll: pick the topic for our next webinar

Past vs Future Benefits

SUSPEND & RESTORE

- Use **SUSPEND** to take *unclaimed, previously issued* benefits away from an employee
- Use **RESTORE** to make eligible, previously suspended benefits available again
- **Availability:** The Employee Benefits Suspension/Restore Process screen shows which benefits are available to suspend/restore
- **Timing:** Submit Suspend or Restore transactions at any time

REMOVED & ON-HOLD

- Use **REMOVED** to *permanently* prevent future benefits from being issued
- Use **ON-HOLD** to *temporarily* prevent future benefits from being issued (end the hold by changing the status to Enrolled or Removed)
- **Timing:** Submit Removed, On-Hold, and Enrolled transactions by your order deadline the month before the benefit month

Why would you use it?

SUSPEND & RESTORE

- SUSPEND
 - Correct a mistake
 - Remove a benefit overpayment to a terminated employee
- RESTORE
 - Correct a Suspend mistake
- TAX IMPLICATIONS
 - If suspended benefits are returned to an employee, consider the need to deduct taxes (as always consult with your tax advisor)

REMOVED & ON-HOLD

- REMOVED
 - Employee no longer wants to participate
 - Employee has been terminated
- ON-HOLD
 - Employee on an out-of-town assignment
 - Employee on extended absence

For Non-Rollovers, a SUSPEND followed by a REMOVED is common

How Do You Do It?

Employee Enrollment Modification Process
CUSTOMER ID: 050005

SmarTrip Card Number: 000000070
First Name: James
Middle Initial:
Last Name: BONGIORNO
Status: ☒ Enrolled ☐ Removed ☐ On Hold
Kickoff Date: 01/01/2018 (mm/dd/yyyy)
Benefit Category Type: T\$0 - Transit \$0
User Defined Key: Test Card

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.

A

Employee Benefits Suspension/Restore Process
CUSTOMER ID: 050005
SmarTrip Card Number: 00000000070

Chk	Seq	Bene Type	Rem Amt	Eff Date	Exp Date	Status	Hold Date	Updated By
☐	001	Parking Rollover	10.00	02/09/2018	03/01/2018	AVAILABLE		-SMKAAW1
☐	002	Transit Non-Rollover	5.75	02/09/2018	03/01/2018	AVAILABLE		-SMKAAW1
☐	003	Transit Rollover	5.00	03/01/2018	04/01/2018	AVAILABLE		-SMKAAW1

Do you really want to suspend/restore the employee's benefits?

Select the above benefits to be suspended and/or restored, and click 'YES' button to submit the request. The status of the selected benefits will be changed from 'AVAILABLE' to 'SUSPENDED', or from 'SUSPENDED' to 'AVAILABLE'

B

Suspend / Restore Steps

1. Click Employee List
2. Click Employee Name
3. Pop-up 'A': Click Suspend/Restore Benefits
4. Pop-up 'B': Unclaimed Benefits Displayed
 - Status is either AVAILABLE or SUSPENDED
 - Check the desired box
 - Click Yes to change the status

C

The benefits have been suspended and/or restored

Click this button to close the window

D

Employee Benefits Suspension/Restore Process

CUSTOMER ID: 050005

SmarTrip Card Number: 00000000070

Chk	Seq	Bene Type	Rem Amt	Eff Date	Exp Date	Status	Hold Date	Updated By
☒	001	Parking Rollover	10.00	02/09/2018	03/01/2018	SUSPENDED	02/22/2018 07:21:56	-SMKAAW1
☐	002	Transit Non-Rollover	5.75	02/09/2018	03/01/2018	AVAILABLE		-SMKAAW1
☐	003	Transit Rollover	5.00	03/01/2018	04/01/2018	AVAILABLE		-SMKAAW1

Do you really want to suspend/restore the employee's benefits?

YES

NO

Select the above benefits to be suspended and/or restored, and click 'YES' button to submit the request. The status of the selected benefits will be changed from 'AVAILABLE' to 'SUSPENDED', or from 'SUSPENDED' to 'AVAILABLE'

Suspend / Restore Steps

5. Pop-up 'C': Confirmed

- Click to close
- Brings you to Employee List

6. Screen 'D': Verify

- Follow Steps 1 thru 4
- Note the status change from AVAILABLE to SUSPENDED
- Made a mistake? You have until the 26th to do a RESTORE
- Click No to close the screen

Checking the Status

Card Number: 000000070
Cardholder Name: JAMES BONGIORNO
LAST SIX EVENTS OF BENEFITS

	Benefit Type	Effective Date	Expiration Date	Initial Amount	Reassigned Amount (in)	Reassigned Amount (out)	Total Claimed Amount	Last claimed Location	Last Claimed Date	Remaining Amount	Status
1	Parking Rollover	02/09/2018	03/01/2018	0.00	10.00	0.00	0.00			10.00	Reassigned (in) / Suspended
2	Transit Non-Rollover	02/09/2018	03/01/2018	0.00	10.00	0.00	4.25	Rail	02/21/2018 16:36:47	5.75	Reassigned (in) / Available
3	Transit Rollover	03/01/2018	04/01/2018	0.00	5.00	0.00	0.00			5.00	Reassigned (in) / Available
4	Transit Rollover	11/22/2017	03/01/2018	0.00	5.00	0.00	5.00	Rail	02/16/2018 06:55:30	0.00	Reassigned (in) / Claimed

Reassigned Amount (in): Receive benefits from other SmarTrip card by benefit reassignment process.
Reassigned Amount (out): Move Benefits to other SmarTrip card by benefit reassignment process.

Close Print

Employee Benefits Suspension/Restore Process

CUSTOMER ID: 050005

SmarTrip Card Number: 00000000070

Chk	Seq	Bene Type	Rem Amt	Eff Date	Exp Date	Status	Hold Date	Updated By
☐	001	Parking Rollover	10.00	02/09/2018	03/01/2018	SUSPENDED	02/22/2018 07:21:56	-SMKAAW1
☐	002	Transit Non-Rollover	5.75	02/09/2018	03/01/2018	AVAILABLE		-SMKAAW1
☐	003	Transit Rollover	5.00	03/01/2018	04/01/2018	AVAILABLE		-SMKAAW1

Do you really want to suspend/restore the employee's benefits?

YES NO

■ Suspend: Another View

- Open the Employee List
- Find the Employee
- Click the Employee's Benefits Assigned Icon
- The 'Suspended' and 'Available' on the *Last Six Benefits Screen* Align with the *Suspension/Restore Screen*

How do I verify my suspension credit? (part 1)

- We'll show you the screens on the next slide
- Assume you suspend an employee's benefit in February 2018
- Click Report; Benefits Claimed; February 2018 Report
 - It's available at 12:00pm ET on the 5th business day of March ... March 7th for 2018
 - It shows the detail and grand totals for Suspended Rollover Benefits and the Current Months Unclaimed Benefits. Add the two together to get your total credit.
- Click Order, Confirm Current Order, to view your April 2018 order
 - The total credit from the February Benefits Claimed Report will match your order credit

How do I verify my suspension credit? (part 2)

February Benefits Claimed Report

EVENT	BENEFIT AUTHORIZED/ROLLOVER/TSFR FROM DATE VALUE	BENEFIT CLAIMED/TSFR TO DATE VALUE	SUSPENDED ROLLOVER BENEFIT	REMAINING ROLLOVER BENEFIT	UNCLAIMED BENEFIT
CARDHOLDER NAME: JAMES BONGIORNO					
	CARD SERIAL #: 000000070				
Remaining Transit Pass Rollover	01/01/2018 18.00				
Remaining Transit Pass Rollover	11/22/2017 15.00				
Remaining Transit Rollover	11/22/2017 2.75				
Remaining Transit Pass Rollover	11/27/2017 3.00				
Transit Pass Non-Rollover	02/09/2018 10.00				
Transit Non-Rollover	02/09/2018 10.00				
Parking Rollover	02/09/2018 10.00				
Total Authorized					
Transit Pass Rollover		02/2018 1.00			
Transit Non-Rollover		02/2018 8.50			
Transit Pass Rollover		02/2018 2.00			
Transit Rollover		02/2018 2.75			
Transit Pass Non-Rollover		02/2018 10.00			
Transit Pass Rollover		02/2018 15.00			
Transit Pass Rollover		02/2018 10.50			
Total Claimed			49.75		
Suspended Parking Rollover			10.00		
Total Suspended Rollover			10.00		
Total Unclaimed/Rollover				7.50	1.50

TOTAL FOR 050005			Current Month Authorized Benefits	32.00
			Rollover Benefits From Previous Months	4,280.15
			Refunded Transit Pass Benefits	0.00
			Benefits Claimed From Monthly Benefits	20.50
			Benefits Claimed From Rollover Benefits	31.25
			Suspended Rollover Benefits	10.00
			Remaining Rollover Benefits	4,248.90
			Current Month Unclaimed Benefits	1.50

\$10.00 + \$1.50 = \$11.50 Total Credit

Aprils Order (submitted in March)

Customer ID: 050005

Customer Name: WMATA Test Account

Order Confirmation: as of (March 07, 2018 01:48:22 pm)

Order must be submitted no later than midnight of the 15th.

ITEM TYPE	DESCRIPTION	UNIT PRICE	UNITS/# OF PATRONS	TOTAL
SBFT	Transit \$0	\$0.00	2	\$0.00
SBFT	Transit \$5 Non-Rollover	\$5.00	1	\$5.00

The value of your SmartBenefits download = **\$5.00**
The value of your Metro parking download = **\$0.00**
The value of your Official Travel download = **\$0.00**
Total order value = \$5.00
Total credit value = \$11.50
Credit applied to this order = \$5.00
Credit remaining value = \$6.50
Payment Due WMATA = \$0.00

Credit for unclaimed SmartBenefits, Metro Parking and Official Travel 02/2018 = **\$11.50**



Suspensions for employees with a rollover balance

- Assume you suspend \$10 of a \$100 transit rollover balance
- The employee still has \$90 of rollover left to use
- To use that \$90, the employee must contact 1-888-SMARTRIP to “refresh” the rollover balance.
- Tip - Advise a ‘rollover’ employee to:
 - Add funds to their personal stored value purse *before* you process a Suspend
 - Contact 1-888-SMARTRIP and request a “refresh” once the faregate, farebox, or parking gate displays that show their personal stored value balance is being used to pay for transit or parking instead of SmartBenefits

What Your Employee Sees

BEFORE SUSPENSION

SmarTrip® Online Card Summary Screen

SmartBenefits® [Learn more](#)

SmartBenefits® available for use:

Name	Status	Period	Period End Date & Time	Period Initial Value	Period Value Remaining
ALP SB Parking Only	Active	Monthly - No Refresh	03/01/2018 12:00 AM	\$10.00	\$10.00
Full Fare - No Refresh					
ALP SB Transit Only - Full Fare - No Refresh	Pending	Monthly - No Refresh	03/01/2018 12:00 AM	\$10.00	\$0.00



AFTER SUSPENSION ISSUED & BEFORE CARD TAPPED

SmartBenefits® [Learn more](#)

SmartBenefits® available for use:

Name	Status	Period	Period End Date & Time	Period Initial Value	Period Value Remaining
ALP SB Transit Only - Full Fare - No Refresh	Active	Monthly - No Refresh	03/01/2018 12:00 AM	\$10.00	\$5.75

Products to Load to Your Card [Learn more](#)

Created	Product	Value	Must be loaded before	Order Number
02/22/2018	ALP SB Parking Only - Full Fare - No Refresh		03/24/2018	

Questions & Answers

<i>TIP</i>	<i>Take advantage of the automatic password reset feature. Keep your SmartBenefits® contact info current.</i>
-------------------	---

Thank You

