

For: FSA and RMA National Office Employees

Commuter Transit Subsidy Benefits (CTSB) Program Changes

Approved by: Acting Deputy Administrator, Management



1 Overview

A Background

Currently DOT is the liaison between Washington Metropolitan Area Transit Authority (WMATA) and the FSA transit subsidy benefits coordinator. Effective August 1, 2012, DOT will no longer serve as the liaison. FSA, MSD will serve as the direct contact with WMATA for transit subsidy benefits for FSA and RMA National Office employees. This transition will change the process for receiving benefits so that employees will be served in a timelier manner.

B Purpose

This notice:

- informs FSA and RMA National Office employees about CTSB Program changes that will effect how benefits are distributed to employees
- provides **required** actions that must be completed by participants in the program and deadlines for completing these actions.

Note: If required actions are not completed by the established deadlines individual transit subsidy benefits may be interrupted.

C Contacts

If there are questions about this notice or the CTSB Program, contact either of the following MSD employees:

- Alita Jordan by either of the following:
 - e-mail to alita.jordan@wdc.usda.gov
 - telephone at 202-401-5517
- Kim Deal by either of the following:
 - e-mail to kim.deal@wdc.usda.gov
 - telephone at 202-720-2341.

Disposal Date	Distribution
February 1, 2013	All FSA and RMA National Office Employees

2 Action

A Purchasing a SmarTrip Card

All participants in the CTSB Program must have a registered SmarTrip card to receive their transit benefit. Participants who do not have a SmarTrip card may purchase a card for \$5 from any of the following:

- WMATA website at <http://www.wmata.com/fares/purchase/store/>
- Metro sales offices, retail outlets, and commuter stores (<http://www.wmata.com/fares/purchase/where.cfm>)
- any Metro station where parking is available (<http://www.wmata.com/rail/stations.cfm>).

B Registering SmarTrip Card

All participants in the program shall register their SmarTrip Card with WMATA to allocate their benefits to their commuter service operator's designated account using the Internet. The enrolled registered card number will link the participant to his/her transit benefit.

Participants shall provide the number of the registered card to Alita Jordan according to subparagraph 1 C.

D Establishing a SmartBenefits Passenger Allocation Account

Transit benefit participants shall follow instructions in this table to establish a SmartBenefits passenger allocation account.

Step	Action
1	Possess a SmarTrip card that is registered with your name and address on the WMATA website.
2	Be enrolled in your employer's SmartBenefits program before the 15 th day of the month before the month you wish to allocate your SmartBenefits. Notes: Participants must be enrolled by July 15, 2012, to receive August benefits. Participants enrolled in the program currently run by DOT do not need to re-enroll to be converted to WMATA.
3	Before July 15 log onto the Van Pool and Transit Services website at http://www.wmata.com/business/employer_fare_program/vanpool_transit.cfm .
4	Choose 1 of the following sections on the page based on commuting method: <ul style="list-style-type: none"> • MTA Commuter Bus Passenger • Van Pool Passenger • MARC and VRE Passenger. CLICK " Step 2 " to set-up an account.

2 Action (Continued)

D Establishing a SmartBenefits Passenger Allocation Account (Continued)

Step	Action
5	CLICK " Set-up My New Account " beneath " I'm a New SmartBenefits User ".
6	Enter your SmarTrip card number and CLICK " Continue ".
7	<p>Create a user ID and password. After completing all required information, CLICK the "Submit This Form" button.</p> <p>Note: Information with and "*" must match the information on your SmarTrip card registration to proceed to the next step.</p> <p>The Welcome to the SmartBenefits Passenger Allocation System page will be displayed, CLICK the "Continue to SmartBenefits Passenger Allocation System" button.</p>
8	CLICK " Bill Payment ", " Make Payment ", then choose the employer/administrator name from the drop-down menu and CLICK " Add Payment ".
9	<p>Based on commuting method, select 1 of the following from the van pool drop-down menu and CLICK "Continue":</p> <ul style="list-style-type: none"> • MTA Commuter Buses (go to step 10) • transit provider if van pool and transit services passengers (go to step 11) • CommuterDirect.com or Arlington Commuter Stores if MARC or VRE passenger (go to step 12).
10	<p>MTA commuter bus passengers shall do the following:</p> <ul style="list-style-type: none"> • CLICK "Continue" again • enter dollar amount into the payment amount line that will be used monthly to purchase MTA ticket only and ENTER "100.00" into the percentage line. • CLICK "Continue". <p>Note: Any remaining benefits not allocated to the transit provider will be available to claim with your registered SmarTrip card at a passes/farecard machine on the 1st of the month.</p> <p>Your allocation will be generated automatically on the 20th day of the month.</p> <p>Go to step 13.</p>

2 Action (Continued)

D Establishing a SmartBenefits Passenger Allocation Account (Continued)

Step	Action
11	<p>Van pool and transit services passengers shall do the following:</p> <ul style="list-style-type: none"> • choose transit service provider number from the drop-down menu and CLICK "Continue" • enter dollar amount in the payment amount line and enter percentage on the percentage line <p>Note: If directing funds to a single transit service provider, then the percentage amount must be 100 percent.</p> <ul style="list-style-type: none"> • CLICK "Continue". <p>Your allocation will be generated automatically on the 1st day of the month.</p> <p>Go to step 13.</p>
12	<p>MARC and VRE passengers, CommuterDirect.com and Arlington Commuter Stores customers shall do the following:</p> <ul style="list-style-type: none"> • select service provider number from the drop-down menu and CLICK "Continue" • enter dollar amount into the payment amount line and enter percentage on the percentage line <p>Note: If directing funds to a single transit service provider, then the percentage amount must be 100 percent.</p> <ul style="list-style-type: none"> • CLICK "Continue". <p>Your allocation will be generated automatically on the 16th day of the month.</p>
13	<p>CLICK "Save", "Finish", and "Logoff".</p>

Note: If a participant changes commuting method, then the current allocation must be deleted and a new allocation setup for the new transit provider. Participants may **only** modify the current allocation to change the amount allocated.

2 Action (Continued)

E Making Changes to an Existing Allocation

Participants may review, modify, or delete an allocation according to this table.

Step	Action
1	Log onto the Van Pool and Transit Services website at http://www.wmata.com/business/employer_fare_program/vanpool_transit.cfm .
2	Choose 1 of the following sections on the page based on commuting method: <ul style="list-style-type: none"> • MTA Commuter Bus Passenger • Van Pool Passenger • MARC and VRE Passenger. CLICK " Step 2 " to access the logon page for your existing account.
3	CLICK " I Already have an Account ", enter your SmarTrip card number, user ID, and password, and then CLICK " Login ".
4	CLICK " Bill Payment ", and then " Make Payment " to review, modify (steps 5-7), or delete (steps 8-10) an allocation.
5	To modify your allocation, CLICK " Modify ".
6	Make changes in payment or percentage amounts and CLICK " Update ".
7	When transaction is confirmed, CLICK " Close " and review your modification.
8	To delete your allocation, CLICK " Delete ". A message will be displayed confirming the transaction.
9	To create a new allocation to another transit provider, CLICK " Bill Payment ", and then " Make Payment ".
10	After modifying or deleting, CLICK " Logoff ".

See Exhibit 1 for a quick reference guide for participant actions.

F TranServe Visa Debit Card

DOT issued TranServe Visa Debit Cards to CTSB program participants who received their benefits through paper vouchers. Participants shall destroy this card. Effective August 1, 2012, when DOT will stop managing the program these cards will no longer be used. Participants shall destroy their card any time after this date.

G Points of Contact

CTSB participants shall contact Alita Jordan or Kim Deal, according to subparagraph 1 C for any of the following:

- lost/stolen SmarTrip cards
- replacement cards
- registering new employees
- name changes.

Smart Benefits Quick Reference Guide

The following table is a reference guide for participant action to continue transit benefits.

Type of Benefit	Action	Result
SmarTrip Benefit Riders	Must have a SmarTrip Card registered in your name on the WMATA website.	The enrolled registered card number links you to your transit benefit.
MTA Commuter Buses: <i>Dillion, Eyre, Keller, Metro Goldline and Atlantic Coast Charters</i>	MTA commuter bus riders must purchase and register a SmarTrip Card on the WMATA website. Before the 20 th of the month before the month benefits will be received (July 20 for August benefit), riders will establish a SmartBenefits account to allocate their monthly benefit for automatic delivery to MTA. Riders will have to purchase tickets from the online MTA Pass Store by the 25 th of the month for mail delivery.	Allocation to MTA will only need to be setup once. Riders will have to purchase tickets each month on the MTA website and they will be mailed directly to the rider after purchase.
Van Pool and Transit Services Passengers	Passengers must have a SmarTrip Card registered in your name on the WMATA website and establish a SmartBenefits account by the 16 th of month to allocate their van pool fare payments directly into their van operator's designated bank account via the Internet.	Your allocation will be generated automatically on the first of every month. This process does not need to be repeated unless changes are required.
MARC and VRE Passengers, Commuter Direct and Arlington Commuter Stores	Passengers must have a SmarTrip Card registered in your name on the WMATA website and establish a SmartBenefits account by the 16 th of month. VRE and MARC riders can allocate their monthly benefit to CommuterDirect.com to have their tickets mailed to their homes or they can go to an Arlington County Commuter store to pick up their tickets monthly.	Your allocation will be generated automatically on the first of every month. This process does not need to be repeated unless changes are required. Additional action is necessary each month to receive tickets from MARC or VRE.