



Washington Metropolitan Area Transit Authority

SmartBenefits[®]

Autoload

Process Overview for Federal Agencies

Office of Marketing
SmartBenefits[®] Sales Team

Dates and processes in this presentation are subject to change.



Purpose

- SmartBenefits® Autoload Refresher
 - Smooth enrollment for employees
 - Updates to Minimize employee benefits un-interruptions





2013 Benefits Levels - IRS Bulletin

Qualified Transportation Fringe Benefit

For taxable years beginning in 2013, the monthly limitation under 132(f)(2)(A), regarding the aggregate fringe benefit exclusion amount for transportation in a commuter highway vehicle and any transit pass, is **\$245**. The monthly limitation under 132(f)(2)(B), regarding the fringe benefit exclusion amount for qualified parking, is **\$245**.



Direct Benefit Savings

**Assumes
\$245 per month**

Direct or Subsidized Benefit	Employee Value
Base Amount	\$2,940.00
Fed Income Tax Saved	\$823.20
Employee FICA 7.65% Saved	\$224.91
State Income Tax 6% Saved	\$176.49
True Value to Employee	\$4,164.60



SmartBenefits®



SmartTrip® Compartments

- Transit benefit
- Metro parking benefit
- Personal stored value



SmarTrip[®] Card Options

A graphic showing three SmarTrip card options. Each option is represented by a yellow box with text and a dollar amount. The background features a stylized illustration of a train and a bus. The SmarTrip logo is at the bottom of the graphic.

Option	Amount
PERSONAL (STORED VALUE) PURSE	\$300
TRANSIT BENEFIT PURSE	\$245
PARKING BENEFIT PURSE	\$245

IRS Limit
2013

IRS Limit
2013





SmarTrip® Fare Example 1

A. Value on card \$7
\$5 stored value
\$2 transit benefit

B. \$ 4 Metrorail fare



C. \$4 Payment = \$2 from transit & \$2 from stored value

C. Remaining value on card: \$3 stored value



SmarTrip® Fare Example 2



A. Value on card \$50
\$0 stored value
\$50 transit benefit
\$0 parking benefit

B. Commuting Costs \$7
\$3 Metrorail fare
\$4 Metro parking

C. \$7 Payment: \$3 from transit, customer must add \$4 to card at vendor to cover full parking fee

D. Remaining value on card: \$47 transit



Reminder for Employees

- Employees cannot have multiple employers applying SmartBenefits® to same card – each needs separate card
- MUST tap card several times to Farecards & Passes machine to establish a travel pattern two weeks prior to start and when making changes.
- **All funds on card will remain in stored value purse**
- Reassigned, Restored and AnyTime funds – allow up to four days from when administrator



Employee Preparation Process

1. Tap enrolled card to SmarTrip® target several times in the last two weeks prior to start month to load Autoload product



2. First day of benefit month, benefits will be available to use
3. Tapping the card to a SmarTrip® target must be done whenever the card is replaced or there is a change to benefit amount or type
4. Report lost or replacement card immediately to:
 - **SmarTrip® Customer Service** for Stored Value Purse transfer
 - **Employer** for Transit and/or Parking benefits reassignment to new card



SmartBenefits[®] & SmarTrip[®] Transit Systems

- SmartBenefits[®] Autoload participating systems
 - Metrorail and Metrobus
 - ART
 - CUE
 - DASH
 - DC Circulator
 - Fairfax Connector
 - Loudoun County Transit
 - PRTC Omni Ride
 - Ride ON
 - TheBus





Employee Online Assistance

[Visit smartrip.com](http://smartrip.com)

Employee view balance and transactions:

- Transit purse – rail faregate or bus farebox
- Parking purse – parking target
- **Personal stored value – Farecards & Passes machine**
- **All balances and transactions – online SmarTrip® account**





SmarTrip® Online Account

WMATA SmarTrip® - Windows Internet Explorer

https://smartrip.wmata.com/Card/CardSummary.aspx?card_id=2948564

File Edit View Favorites Tools Help

WMATA SmarTrip® WMATA SmarTrip®

LOG OUT

Fares

- Metro rail
- Metro bus
- SmarTrip®**
- Reduced Fare Program
- Purchase Fares

Card Summary Information

Card Information

Card Nickname: ALP Pilot Card
Card Number: 011952691
Card Status: Active

Note: the displayed balances in the categories below might not reflect all transactions that have occurred on a bus for up to three business days.

Manage Your SmarTrip® Card

- Manage Your SmarTrip® Account
- Update Card Information
- View Usage History
- Report Cards as Lost/Stolen/Damaged or Malfunctioning
- Remove SmarTrip® Card
- FAQs

Stored Value

The Stored Value reflects the amount stored on the card that can be used for transit and parking without restrictions.

Balance: 17.55

SmartBenefits®

Learn more about SmartBenefits®

Name	Operator	Period	Period End Date & Time	Period Remaining Value	Period Initial Value
ALP SB Prk FF	Regional Op.	Calendar Monthly	05/01/2011 12:00 AM	\$160.00	\$160.00
ALP SB Trm FF	Regional Op.	Calendar Monthly	05/01/2011 12:00 AM	\$111.10	\$120.00

Done Internet 100%

stored value →

parking purse →

transit purse →



Features & Customer Benefits

Features

Separate transit from parking



Unused benefit treatment



Autoload



Self-service web access



Bus & Rail system upgrade



Customer Benefits

IRS compliance
Use of benefits as intended

Rollover or credit account option

Access at any SmarTrip® target
except CPOS unit

View balance and transactions

Regional standardization &
interoperability



Thank You

SmartBenefits[®]

www.wmata.com