



Massachusetts Bay
Transportation Authority

MBTA STUDENT PASS PROGRAM USER GUIDE

Updated July 2022

MBTA Student Pass Program Service
617-222-5710
studentpassprogram@mbta.com
Monday through Friday, 7AM to 3PM EST

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1. OVERVIEW

School administrators can sign up for the [MBTA's Student Pass Program](#) to order S-Cards at no cost and/or M7 Passes for \$30.00 a month per pass activated/used. Please note that payment information is required during the registration process, irrespective of which product (S-Card or M7) the school intends to order, and schools are invoiced for M7s the following month based on activation/usage.

This guide shows you how to register for a MBTA Student Pass Program account, order Student CharlieCards (S-Cards and/or M7s), activate/assign your Student CharlieCards, and manage your Student Pass Program account online. The MBTA Student Pass Program can be accessed online at <https://passprogram.mbta.com>.

2. REGISTRATION

To get started, you need to register your school for a Student Pass Program account. In your web browser, enter passprogram.mbta.com and click **Middle & High School Students**.

The screenshot displays the MBTA Student Pass Program website. The top navigation bar includes links for MBTA Home, Business Center, Buy Individual Passes, and Accessibility. A left-hand menu lists various program options, with 'Middle & High School Students' highlighted in a red box. The main heading is 'School Registration'. Below this, it states: 'Registration steps for an MBTA Student Pass Program account are as follows:'. Two steps are listed: Step 1: Fill out and submit form below; Step 2: Fill out and e-mail a signed W-9 form to studentpassprogram@mbta.com. A note indicates that once a W-9 is received, the MBTA will review the application and send approval or request more information within 3-5 business days. The registration form includes the following fields: School Type (Public), Federal Tax ID (EIN) (### #######), School Name, State School ID, Address 1, Address 2, City, State (Massachusetts), Zip, and Country (United States of America). A 'Log in or Sign up' section on the left contains fields for User Name and Password, with a 'Log In' button and a 'Forgot password?' link.

1. Fill out the registration form online.
2. Review the **Terms and Conditions of Use for Student Pass Program**, and the **MBTA's Website and Electronic Fare Media Privacy Policy** – both located at the bottom of the registration form.
3. Select the checkbox acknowledging acceptance of the MBTA's Terms & Conditions.
4. Select the checkbox acknowledging the MBTA's Privacy & Policy Statement.
5. Click the **Sign Up** button.
6. On the School Registration – Thank You page, click on the **W-9 Form** link to open the W-9 form. Complete the form and email to the noted email address.

Upon receipt of your registration and signed W-9 form, the MBTA will review your registration and if approved, the School contact designated on the registration form will receive an email notification authorizing login with the username and password designated at registration.

3. PAYMENT INFORMATION

- The first time you log into your Student Pass Program account, the **Payment Methods** page is displayed.
- Please note that payment information is required, irrespective of which product (S-Card or M7) the school intends to order.
- Choose from pay by ACH, pay by check, or Paymode.
- If Payment by ACH is selected, fill in all the fields and click the **Update** button at the bottom of the page.

Paying by ACH

The MBTA Student Pass Program uses ACH, a highly reliable and efficient electronic funds transfer system, which makes it easier for you to order CharlieCards and other commuter benefits. Your ACH will take place on the 16th of every month (or the next business day after the 15th).

Paying by Check

If you wish to pay for your order by check, please make the check payable to **MBTA Pass Program** and mail it to:

MBTA Student Lockbox
PO Box 845847
Boston, MA 02284-5847

For overnight packages e.g. FedEx, customers should use:

MBTA Student Lockbox
Attn: Lockbox Operations, P.O. Box 845847
1 Cabot Road, Suite 202
Medford, MA 02155

Payment Option

**Current
Payment
Option:**

Mail a Check ▼

4. ADD USERS

After entering your payment information, you may want to add other users to the account. The School contact noted on the registration form is the designated **Super User**. Only the Super User can make any account changes, including adding additional users, are managed by the Super User. New users are added as **Pass Administrators** which allows them to manage Student CharlieCard ordering and activation. There is no limit on the number of Pass Administrators that can be added on the account.

1. Click on **Account Management**.
2. Click on **List Administrative Users**.
3. Click the **Add New User** link.
4. Enter all information and click the **Add** button.

Administrative Users

Click **Edit** next to the username field to edit an administrator's information. You can also add pass administrators—simply click **Add New User**, provide the new user's contact information, and click **Add**.

Display Active Only

	User Name	Email Address	Role	Last Activity Date
Edit	BCHigh	BCHigh@mycom.com	Super User	9/25/2018 2:57:10 PM
Edit	Beth Johns-Thomas	Beth Johns-Thomas@mycom.com	Pass Administrator	7/16/2018 5:03:50 PM

[Add New User](#)

5. LANDING PAGE

Click on the MBTA logo to view the timeline for managing your Student CharlieCards.

Account Management	CharlieCard Management	Review Current Order											
<ul style="list-style-type: none"> › Account Management › CharlieCard Management › Review Current Order 	<h3>CharlieCard 7 Day Student Pass (M7) and Student Stored Value Card (S-CARD)</h3> <table border="1"> <thead> <tr> <th>If you place an order:</th> <th>Your CharlieCards will arrive</th> <th>For Example:</th> </tr> </thead> <tbody> <tr> <td>Between July 5th for the next school year, and before 11:59PM on the 15th of August</td> <td>Between the 21st and 27th of August</td> <td>If you were to place an order on July 18th, you would receive your CharlieCards no later than August 27th.</td> </tr> <tr> <td>Between August 16th and August 30th</td> <td>By September 1st</td> <td>If you were to place an order at 11:00AM on August 17th, you would receive your CharlieCards by September 1st</td> </tr> <tr> <td>Before 3:00PM after August 30th</td> <td>The next business day</td> <td>If you were to place an order at 11:00AM on September 1st, you would receive your CharlieCards on September 2nd</td> </tr> </tbody> </table> <h3>Activating, Deleting and Removing CharlieCards from Account</h3> <p>All CharlieCard Passes are shipped in an unassigned state. All CharlieCards are sent via UPS and require delivery confirmation. Customers have 5 business days after order delivery to dispute any undelivered or lost/stolen orders. All active and unassigned/used CharlieCards on a schools account will be billed unless reported lost/stolen. The Student CharlieCard Pass program is billed in arrears, meaning schools will be invoiced the month after passes are ordered.</p> <p>The MBTA requires the school pass administrators to track CharlieCards serial numbers with card owners. Any lost/stolen passes that are unreported to the MBTA Pass Administration will be subject to full replacement cost of \$30 per month/per card. In addition, if an account cancellation is requested, e.g. all the cards on the account are canceled, the school will not be able to participate in the program for the remainder of the academic year.</p> <p>The Student Pass program is based on a 10 month school year. Student CharlieCard Passes may not be temporarily suspended from an account.</p> <p>If a Student CharlieCard Pass is used prior to the month of its intended use, the unpurchased full monthly charge of the Student CharlieCard Pass will be charged to the account.</p>	If you place an order:	Your CharlieCards will arrive	For Example:	Between July 5th for the next school year, and before 11:59PM on the 15th of August	Between the 21st and 27th of August	If you were to place an order on July 18th, you would receive your CharlieCards no later than August 27th.	Between August 16th and August 30th	By September 1st	If you were to place an order at 11:00AM on August 17th, you would receive your CharlieCards by September 1st	Before 3:00PM after August 30th	The next business day	If you were to place an order at 11:00AM on September 1st, you would receive your CharlieCards on September 2nd
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<p>Click Here to View a Tutorial on the Program.</p>													

6. PLACE ORDERS

Sign into the administrative portal to order new cards.

1. Click on **CharlieCard Management**.
2. Select **Order New Cards** in the left panel.
3. Note the quantity next to each product (S-Card/M7) required.
4. Click on **I agree and accept the Terms and Conditions**.
5. Submit button will present.
6. Click **Submit**.

Order New CharlieCards

The MBTA offers two types of Student CharlieCards:

CharlieCard 7 Day Student Pass (M7): [See More](#)

Student Stored Value Card (S-Card): [See More](#)

Account Management: [See More](#)

Payment and Invoicing: [See More](#)

Both programs require students be between the ages of 12 and 22 and enrolled in a Massachusetts middle school, junior high, or high school in order to qualify. The MBTA reserves the right to bill your school for any CharlieCards that are fraudulently used.

Academic year for which you are ordering:

Product Desc	Unit Price	Quantity	SubTotal
** New CharlieCard 7 Day Student Pass **	\$0.00	<input type="text"/>	
** New Student Stored Value CharlieCard **	\$0.00	<input type="text"/>	
Subtotal:		0	\$0.00 ?

I agree and accept the Terms and Conditions

Note: There is no cost associated with ordering new M7 CharlieCards until they are activated through assignment and/or used. S-Cards are ordered and assigned at no cost to the school. Student CharlieCards ordered will be loaded with the applicable product (S-Card/M7) and included on your monthly invoice.

7. ACTIVATING/ASSIGNING CHARLIECARDS

All Student CharlieCards (S-Cards and M7s) need to be assigned (i.e. activated) prior to distribution to students in case they need to be replaced, etc.

1. Click on **CharlieCard Management**.
2. Select **Assign CharlieCards on Hand**.
3. Select the checkbox beside each card to be assigned and, if desired, enter a Student #. Student CharlieCards can be activated/assigned without a Student #.
4. Click on **Assign Selected CharlieCards** to complete the assignment and activation process.

Assign CharlieCards on Hand

Select the CharlieCards you want to assign and enter the associated Student # (optional). Click **Assign Selected CharlieCards**.

Filter Products:

Assign selected CharlieCards.

Assign selected CharlieCards

<input type="checkbox"/>	Sequence #	Serial #	Monthly Product	Student #
<input checked="" type="checkbox"/>			Student Value CharlieCard	

8. REMOVING ACTIVE STUDENT CHARLIECARDS

Your schools can remove active Student CharlieCards from your account at any point. Your school will be charged for all **Active M7 CharlieCards** on a monthly basis. If an Active M7 CharlieCard is no longer needed, you must change the card status to **Remove from Account** to prevent any future charges.

1. Click on **CharlieCard Management**.
2. Select **CharlieCard Status**.
3. Change the Status to **Remove from Account**.
4. Click on **Update CharlieCard Account**.

CharlieCard Management

CharlieCards Lookup

Division:

Student #:

Serial Number:

Card Status:

Monthly Product:

If a card is lost or stolen, click on "Report Lost/Damaged Card"

When you are finished entering information onto this page, please make sure to click on "Save" at the bottom.

Serial #	Status	Monthly Product	Student #
	<input type="text" value="Remove from Account"/>	7 Day Student CharlieCard	<input type="text"/>

9. BULK CHARLIECARD UPLOADS

1. Click on **CharlieCard Management**.
2. Select the **Roster Download/Upload Tool**.
3. Click the **Export Current Order Roster** button to obtain an Excel file of your current Student CharlieCards.

To view only unassigned cards, check the “Export only Unassigned CharlieCards” option.

Roster Download/Upload Tool

You can use this tool to update your CharlieCard assignments in bulk.

Step 1: To begin, download your current roster of assigned cards and unassigned cards on hand.

Step 2: Edit the Excel roster you downloaded. Mark cards to status A (for “assigned”) to activate the card and add it to your monthly order. Make sure you add employee names to newly-assigned cards. Mark cards to status U (for “unassigned”) to deactivate cards. Please note that if you leave the status field across from a CharlieCard number blank, the upload will fail.

Step 3: Upload your edited file (Using Excel’s .xls format) to the roster uploader. The updates will be reflected in your CharlieCard Management section right after the upload finishes.

Roster Download:

To export the order roster, click on the button below. or download a sample order roster template from [here](#).

Export only Unassigned CharlieCards

For more information on the Order Roster Uploader, please refer to the [Student Program User Guide](#)

Export Current Order Roster

In the downloaded Excel spreadsheet:

- The current status of each card is noted in **column N**.
- Cards cannot be changed from Active or Removed from Account to Unassigned.
- Personal Information (Name, Email) is NOT collected for Students. **Any values entered in the Name/Email fields and uploaded for the Student Pass Program will not be stored and will be blank.** You can choose, however, to assign a card by entering a Student ID in the UserID field (column K).
- To activate a card: change the Status Codes from U (Unassigned) to A (Active).
- To ignore a card: place a U in the cell.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1	H	AccountNo	TransactionNumber	SerialNumber	SequenceNumber	ProductID	ProductPrice	FirstName	MiddleInit	LastName	UserID	EmailAddress	Division	StatusCode
2	C	N	1			4005	30	TBD		TBD				U
3	C	N	2			4005	30	TBD		TBD				U
4	C	N	3			4005	30	TBD		TBD				U
5	S		4											

Steps to upload:

1. Save the roster as an XLS file and note the file save location.
2. Return to the **Roster Tool** page and under **Roster Upload** select **Choose File**.
3. Select your updated file from the file save location and click on **Open**.
4. Click on the **Upload New Order Roster** button.
5. View Validation Result and address any errors in file. Go back and re-upload the file if changes are necessary.
6. Click on the **Continue Import File** button.

Roster Download:

To export the order roster, click on the button below. or download a sample order roster template from [here](#).

Export only Unassigned CharlieCards

For more information on the Order Roster Uploader, please refer to the [Student Program User Guide](#)

[Export Current Order Roster](#)

File Successfully Validated.
Step 2: Click [Continue Import File] to import file.

Roster Download/Upload Tool - Confirmation

You can use this tool to update your CharlieCard assignments in bulk.

Step 1: To begin, download your current roster of assigned cards and unassigned cards on hand.

Step 2: Edit the Excel roster you downloaded. Mark cards to status A (for "assigned") to activate the card and add it to your monthly order. Make sure you add employee names to newly-assigned cards. Mark cards to status U (for "unassigned") to deactivate cards. Please note that if you leave the status field across from a CharlieCard number blank, the upload will fail.

Step 3: Upload your edited file (Using Excel's .xls format) to the roster uploader. The updates will be reflected in your CharlieCard Management section right after the upload finishes.

File Name: student test.xls

Total Records Count: ██████████

Successful Count: ██████████

Error Count: 0

[View Validation Result](#) [Download Validation Result](#)

[Continue Import File](#) [Back](#)

10. ORDER REVIEW

1. Click on **Review Current Order**.
2. Select **Current Order Summary**.

Current Order Summary

Student card orders placed between 7/5 - 8/15 for the coming academic year will post at 12:00 AM on 8/16. This order may be modified prior to 8/16 by navigating to the CharlieCard Management page and selecting Order New Cards from the left panel. After making your desired changes and accepting the Terms and Conditions, click the **Submit** button.

Any orders placed between 8/16 - 6/15, during the academic year, will post immediately.

Between 8/16 and 8/30 the Current Order Summary page represents a forecast of your School's next monthly Invoice as of the current date.

Billing is posted on the 16th of every month. The amount due is based on the number of active MF Student Cards your school holds as of the billing date.

[Simple View] [Detail View] [Print Invoice] [Print Invoice with Detail]

Order Information

META Pass Program PO Box 845831 Boston, MA 02284-5831 (617) 222-5710	
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Address Information

<div style="background-color: #003366; color: white; padding: 2px; font-weight: bold;">Billing</div>	<div style="background-color: #003366; color: white; padding: 2px; font-weight: bold;">Shipping</div> <div style="text-align: right; font-size: small; color: #003366;">Edit</div>
--	--

Product Name	Unit Price	Quantity	Amount
7 Day Student CharlieCard			
Student Value CharlieCard			

11. PAYMENT

- ACH processing occurs on the 16th or the next business day of each month.
- If you are paying by Check or Paymode, we must receive payment by the 15th of the following month.

12. BALANCE SUMMARY

You can view all your invoice and payment transactions:

1. Click on **Review Current Order**.
2. Select **Balance Summary**.

Balance Summary								
Id	Date	Transaction Description	Order Product Amount	Applied Adj Amount	Invoice Total Amount	Payment Amount	New/Pending Adj Amount	Balance
			\$0.00	\$90.00	\$90.00			\$90.00
								\$0.00

13. REPORT LOST/DAMAGE STUDENT CHARLIECARDS

To report a lost or damaged card, you will need the card serial number. Once submitted, the old card will no longer be usable. **Any M7 replacement cards must be ordered immediately after reporting a card lost or damaged to prevent additional charges.** The action of logging off and signing in later produces a new order, thus an additional charge for any M7s that are activated.

1. Click on **CharlieCard Management**.
2. Select **Report Lost/Damaged Card**.
3. Enter the CharlieCard serial number and click **Submit**.

Report Lost/Damaged Card

NOTE: This card will be removed from the account the moment that you click one of the replacement options. If you intend to use the "Assign New Card" option, please make sure that you have a new blank CharlieCard on which to reassign this card's benefits before you click the "Assign New Card" button. Make sure that you complete the entire process without interruptions.

You can check if your account has new blank CharlieCards available by clicking on the "Activate Cards" section on the left panel of this screen.

Serial Number:

Submit

4. **S-Cards only:** Does this S-Card contain a monthly pass?

Using the dropdown list, please **select one**:

- S-Card WITH monthly pass
- S-Card WITHOUT monthly pass

If WITH monthly pass, a temporary monthly pass via CharlieTicket will be provided by the MBTA for the Student's use for the remainder of the month. **Note:** Unassigned S-Cards are ineligible for a temporary monthly pass.

5. If available, select the new card to be assigned from the dropdown menu of available cards.
6. Click **Assign New CharlieCard**.

Report Lost/Damaged CharlieCard Detail

Serial No:	[redacted]
CharlieCard Status:	Active
Monthly Product:	7 Day Student CharlieCard
Student Number:	[redacted]

Please select a new Unassigned CharlieCard from the list below to assign to the student.

[redacted]

Assign New CharlieCard

7. If there are no unassigned cards available to replace the lost/damaged card, then click **Report Lost/Damaged CharlieCard**.
8. You will be prompted to proceed to the **Order New Cards** page to place an order for the replacement Student CharlieCard.

14. ACCOUNT MANAGEMENT

- Keeping your contact information up to date will ensure that you receive important updates.
- Navigate to the Account Management page to update your information.

Contact Information

Please make sure to verify that your account information is correct. Select from the Contact Type pull-down menu to indicate whether the contact is a primary contact or secondary. Click Edit to make changes to your information (please make sure we have your email address!). When you've finished editing, click Update

Contact Type: Primary ▾

Contact Person:	SQA Team and rich
Address 1:	10 Park Plaza
Address 2:	Suite4730
City:	Boston
State:	MA
Zip:	02116
Country:	USA
Email Address:	maxplanck@sillymail.com
Phone:	617-222-4226
Fax:	
Note 1:	New company sign up from CorporateProgram

Edit

15. MBTA CONTACT INFORMATION

If you have any questions, please contact the Student Pass Program manager by email studentpassprogram@mbta.com or phone 617-222-5710.