Perq for Work Administrative User Guide

Perq Customer Service 1-888-844-0353 passprogram@mbta.com Monday through Friday 7AM to 8PM EST Saturday and Sunday 9AM to 5PM EST

Welcome to the MBTA Perq for Work Program

This short guide will show you how to order Smart Cards and Flash Passes on behalf of employees, confirm and assign your Smart Cards, and manage your organization's order online. Perq orders are split between three different sections:

- 1. <u>Smart Cards for Employees</u>: Monthly LinkPasses and Bus passes are managed in this section
- 2. <u>Flash Passes for Employees</u>: Monthly Commuter Rail and Ferry passes are managed in this section
- 3. <u>Daily Pass Purchases for Employer</u>: This section allows customers to purchase 1 or 7 Day passes on an as-needed basis

Massachusetts Bay Transportation Authority	Current Order Cutoff Date: User Guide Welcome CarmelTe Month: 8/15/2019 September, 2019			CarmelTest Log off	
Account Management	Employee Smart Cards	ployee Smart Cards Employee Flash Passes Purchase Daily Passes Revie			
> Account Management> Employee Smart Cards	Ordering Blank	Perq Program Monthly Order Details Ordering Blank Smart Cards—Subway and Bus Commuters			
> Employee Flash Passes	If you place an order: Your Smart Cards will arrive For Example:				
 > Purchase Daily Passes > Review Current Order 	By 11:59 PM on the Between the 21st and 27th of some would receive your Sm February 27th.		rder on February 3rd, you rt Cards no later than		
	Confirming Sm	art Cards Received in M	ail		
Pera 🕑	Upon receipt you wi will become availabl	Upon receipt you will need to confirm all Smart Cards that are in your possession. Once confirmed your passes will become available as "unassigned" stock on your account. Click here to view card confirmation instructions.			
Work	Assigning Sma	Assigning Smart Cards on Hand or Removing Smart Cards from Account			
	If you assign, mark unassigned, or remove a Smart Ca	Your status changes w ard:	vill For Example:		
	By the 27th of any month	On the 1st of the followin month	ng If a pass is assigned on not be used before Janu usage will result in an un	December 22nd, it should ary 1st. Early or unassigned authorized usage fee.	

Placing Orders for Smart Cards: Subway and Bus Commuters

Under the Employee Smart Cards tab, select Order New Smart Cards to order Subway and Bus Passes.



Make sure to order enough Smart Cards to have on hand for new hires. You will not be charged until these cards are either assigned to employees or actually used in the MBTA system.



Enter the quantity of Smart Cards you want to order and then click **Submit** when you are finished. Note there is no cost associated with new Smart Cards until they are confirmed and assigned. Active Smart Cards will be loaded with the applicable product the following month and included on your monthly invoice. These orders will reoccur monthly until you remove the cards from your account.

new employees. These Smart Cards are free the pass values until you activate the card. Pli	ed supply of S and your com ease note that	mart Cards o pany will not these cards	on hand for be billed for are the sole
any Smart Cards that are fraudulently activate	erves the righ	t to bill your o	company ior
Any Smart Cards ordered between the 1st an	d the 15th of t	he month will	be delivere
		ie monur mi	be dentere.
by the 27th of that month			
by the 27th of that month.			
by the 27th of that month.			
by the 27th of that month.			
Product Description	Unit Price	Quantity	SubTotal
Product Description ** New CharlieCard - Monthly Inner Express Bus Pass **	Unit Price \$0.00	Quantity	SubTotal
Product Description *** New CharlieCard - Monthly Inner Express Bus Pass ** *** New CharlieCard - Monthly Inner Express Bus Pass **	Unit Price \$0.00	Quantity	SubTotal
Product Description ** New CharlieCard - Monthly LinkPass **	Unit Price \$0.00 \$0.00	Quantity	SubTotal
Product Description New CharlieCard - Monthly LinkPass ** New CharlieCard - Monthly LinkPass ** New CharlieCard - Monthly LinkPass **	Unit Price \$0.00 \$0.00 \$0.00	Quantity	SubTotal
Product Description New CharlieCard - Monthly LinkPass ** New CharlieCard - Monthly LinkPass ** New CharlieCard - Monthly Local Bus Pass ** New CharlieCard - Monthly Local Bus Pass **	Unit Price \$0.00 \$0.00 \$0.00	Quantity	SubTotal
Product Description New CharlieCard - Monthly LinkPass ** New CharlieCard - Monthly Local Bus Pass ** New CharlieCard - Monthly Local Bus Pass ** New CharlieCard - Monthly Outer Express Bus Pass **	Unit Price 50.00 50.00 50.00 50.00	Quantity	SubTotal

If you have employees with Senior or TAP statuses that wish to purchase monthly Subway or Bus passes, select the **Order Senior/TAP Cards** option, enter the participant's information, and click on **Submit**.



Order Senior / T.A.P. Cards

Reduced-fare monthly LinkPasses can be purchased for employees with Senior or Transportation Access Pass (TAP) privileges in the following way:

- Each employee wishing to purchase a reduced-fare LinkPass through Perq will first need to obtain a valid reduced-fare CharlieCard at the MBTA CharlieCard Store at Downtown Crossing Station (7 Chauncy Street, Boston, MA 02111). The store is open Monday to Friday 8:30 AM to 5 PM.
- Once an employee has a special reduced-fare CharlieCard, the employer administrator needs to record their name and the serial number of their reducedfare CharlieCard (starting with "5-") in the table below and press "Submit."
- The order for an eligible employee will automatically renew each month. A new paper LinkPass will be sent each month to the employer along with any other Perq fare media. Employers will be charged \$30 for each Senior or TAP LinkPass delivered.

Note: Due to technical limitations, the Perq program is unable to load a pass directly to Senior or TAP CharlieCards.

First Name	M.I	Last Name	Senior / TAP Serial #	Price
				\$30
				\$30
				\$30
				\$30
				\$30
				\$30
				\$30
				\$30
				\$30
				\$30
Submit			Need more row	s? 10 🔻

Active Reduced-Fare LinkPass Orders

Ordering Flash Passes: Commuter Rail and Ferry Commuters

To order Commuter Rail and Ferry passes, click on the **Employee Flash Passes** tab and enter the number of passes you need for the benefit month and then click **Update Current Order**. You will be charged for each Flash Pass ordered, as these passes are valid for use as soon as the month printed (the "benefit month") begins.

Massachusetts Bay Transportation Authority	Current Order M November, 201	1onth: 8	Cutoff Date: 10/15/2018	Welcom	e company	Log off
Account Management	Employee Smart Cards	Employ	ee Flash Passes	Purchase Daily Passes	Review Cu	rrent Order

Flash Pass: Commuter Rail and Ferry Passes

Before you order, make sure you are familiar with the current MBTA Flash Pass Return Policy. Click Here to View.

To order Flash Passes, simply enter the quantity (0 for remove) of tickets you would like. When you've completed your order, click **Update Current Order**.

If your order contains Flash Passes products, your order will be shipped to you before the month of use.

Product Acronym	Product Description P		Quantity	SubTotal
Express Bus				
BUSINX	Inner Express Bus Pass	\$136.00	2	\$272.00
BUSOTX	Outer Express Bus Pass	\$168.00		
Commuter Bo	at			
BOAT	Commuter Boat Pass	\$329.00	3	\$987.00
Commuter Ra	il			
10ZON1A	10-Ride CR (Senior / T.A.P Fare) Zone 1A	\$11.00		
10ZON1	10-Ride CR (Senior / T.A.P Fare) Zone 1	\$32.50		

Purchasing 1 and 7-Day Passes

Under the Purchase Daily Passes tab, enter the quantity of passes you want to order and then click **Update Current Order**.

Massachusetts Bay Transportation Authority	Current Order M November, 201	Ionth: Cutoff Date: 8 10/15/2018	Welcom	e company l	Log off
Account Management	Employee Smart Cards	Employee Flash Passes	Purchase Daily Passes	Review Current	t Order

Product Description	Unit Price	Quantity	SubTotal
Daily Passes			
1 Day Link Pass	\$12.75	0	
7 Day Link Pass	\$22.50	0	
		Total:	
Update Current Order			

Reviewing Final Order and Late Adjustments

After updating all relevant sections, click on the **Review Current Order** tab to see your total charges.

Massachusetts Bay Transportation Authority	Current Order M November, 201	lonth: Cutoff Date: 8 10/15/2018	Welco	me company Log off
Account Management	Employee Smart Cards	Employee Flash Passes	Purchase Daily Passes	Review Current Order
Your of chang and ti (888) Inform	current Order Summ current pending order is shu ges to the Smart Card or Fil hen post at 12:00am on 11/ -844-0353 or passprogram nation.	mary own below. To modify this p ash Passes tab and save th (16/2018. Please contact cu @mbta.com if you have cha	ending order total, make iem. Your order will lock stomer service at inges to your Account	
[Sim;	ole View] [Detail View] [[Print Invoice with Detail] Order Information		
MB PO Bos (88)	TA Pass Program Box 845831 ston, MA 02284-5831 8) 844-0353	Invoice #: Order #: Order Date: Benefit Month: Pass Program: Account #:	298118 (NEW ORDER) November, 2018 Corporate M3823	
		Address Information		
Bil	ling	Shipping	Edit	
SQ	A Test Company			
ATT	IN: SQA Team and rich	56 Park Plaza		
101	Park Plaza	AFC ITD Departme	nt	
Suit	te 4730 ston, MA 02116	Boston, MA 02116		

Both your Smart Card and your Flash Pass orders are reoccurring. If no changes are made, all orders are locked in at **11:59PM on the 15th of every month**. You do have the option from the 16th to the 27th to make certain late adjustments.

In this Late Adjustment Period, you can change the status of your Smart Cards. If you assign an unassigned card, this will create a credit adjustment for the next benefit month. If you remove a card from your account, a debit adjustment will occur the next benefit month. Please note that changes are not allowed to your Flash Pass order during this Late Adjustment Period. ACH processing occurs on the 16th or the next business day of each month.

<u>Serial #</u>	Status	Monthly Product	Employee Info	Employee #
	Active Active Remove from Account	Local Bus Monthly Pass Adult	First:	

Confirm Smart Cards Received

All new Smart Cards must be confirmed by the 1st Friday of the benefit month. Any unconfirmed Smart Cards are assumed to have not been received and will therefore be permanently deleted.

Under the **Employee Smart Cards** tab, select **Confirm Cards** to view a list of your new cards. Select the check box next to the Smart Cards you received and click **Confirm selected Smart Cards**. Click **Unaccount Selected Smart Cards** to report any cards not received.

Confirm Receive	d Smart Cards
Use this section to confirm re confirmed by the first Friday promptly deactivated. <u>You ca here.</u>	eceipt of Smart Cards. Please note that all cards must be of the month after receipt. Cards not confirmed will be an access a user guide for the card confirmation steps
For cards successfully recein Confirm selected Smart Ca assigned to employees either begin billing for unused card	ved in the mail, please select the Smart Cards and click ards . These cards will remain activate and can be ar immediately or at a later date. The MBTA does not is unless they are assigned.
For cards not received, simp Unaccount Selected Smar for cards reported as not rec	ly select the serial numbers in question and click t Cards to report them missing. You will not be charged relved.
Filter Products: -	*
Number of unconfirmed card	is (with the selected product filter): 54
A set that the two set of the set of	
Confirm selected CharlieCard	Is Unaccount Selected CharlieCards
Confirm selected CharlieCard	Is Unaccount Selected CharlieCards
Confirm selected CharlieCard	S Unaccount Selected CharlieCards Monthly Product Outer Express Bus Monthly Pass
Confirm selected CharlieCard	Is Unaccount Selected CharlieCards Monthly Product Outer Express Bus Monthly Pass Monthly Link Pass

Assign Smart Cards on Hand

You will need to assign Smart Cards prior to distributing them to employees. Select the check box beside the serial # and select **Assign Selected Smart Cards** button. You may optionally enter a name and/or an ID for each employee to facilitate tracking.

Ass	ign Sm	art Cards	s on Hand	l		
Select emplo	t the Smart (byee name o	Cards you want r ID associated	to assign, mak with it Click As	ing sure that sign Selecte	each ca d Sma	ard has an rt Cards .
Filter	Products:	-		~		
Assi	gn Selected S	Smart Cards				
	Serial #	Monthly Product	Last Name	First Name	M.I	Employee #
		Local Bus Monthly Pass Adult				
		Monthly Link Pass				

You can do this manually or use the Roster Upload/Download Tool, available on the Employee Smart Cards sidebar. If you do not have any cards shown on this screen you will need to select the **Confirm Cards** button and follow the steps.

Program Management—Replacing Lost or Stolen Smart Cards

If an employee loses his or her Smart Card, click on the **Report Lost/Damaged Card** button and follow the steps.



You will need to have the old card number and a replacement card on hand to successfully reassign a card. The old card will no longer be usable in the system.

Report L	.ost/Damaged Card
NOTE: This c the replaceme make sure th card's benefit you complete	ard will be removed from the account the moment that you click one of ent options. If you intend to use the "Assign New Card" option, please hat you have a new blank Smart Card on which to reassign this ts before you click the "Assign New Card" button. Make sure that the entire process without interruptions.
You can chec the "Activate of	k if your account has new blank Smart Cards available by clicking on Cards" section on the left panel of this screen.
Serial Number:	I
Su	ıbmit

Once you report a valid card lost or stolen, you will be prompted with a choice to either replace it with a Smart Card you have on hand or to order a new Smart Card to replace the lost pass. Please note that new cards ordered this way may take a few days to be shipped to your mailing location.



Please remember to order a blank Smart Card for the next benefit month before the 15th at 11:59 PM EST by choosing the Order New Cards button and submitting an order. Lost or stolen Commuter Rail or Ferry flash passes are not replaceable or refundable.

Program Management—Removing Smart Card Users

If an employee is no longer eligible or terminates their participation, edit the status of the Smart Card to Remove from Account. Click on the **Employee Smart Cards** tab, and you should see a list of serial numbers, monthly products and status options for active cards. Select the Remove from Account status option and click on the **Save** button.

<u>Serial #</u>	Status	Monthly Product	<u>Employee Info</u>	Employee #
1004	Active 💌	Monthly Link Pass	First	
	Active		M.I:	
	Remove from Account		Last:	

Account Management

When managing the program, make sure you keep your contact information up to date. This is how we can communicate important updates to you. Contact Information page is available under the Account Management tab.

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If you have any questions, please email passprogram@mbta.com or call our toll free number 1-888-844-0353.