

Perq for Work Administrative User Guide

Perq Customer Service

1-888-844-0353

passprogram@mbta.com

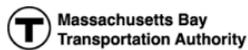
Monday through Friday 7AM to 8PM EST

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



Current Order Month:
September, 2019

Cutoff Date:
8/15/2019

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Perq Program Monthly Order Details

Ordering Blank Smart Cards—Subway and Bus Commuters

If you place an order:	Your Smart Cards will arrive	For Example:
By 11:59 PM on the 15th of any month	Between the 21st and 27th of the month	If you were to place an order on February 3rd, you would receive your Smart Cards no later than February 27th.

Confirming Smart Cards Received in Mail

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.](#)

Assigning Smart Cards on Hand or Removing Smart Cards from Account

If you assign, mark unassigned, or remove a Smart Card:	Your status changes will take effect:	For Example:
By the 27th of any month	On the 1st of the following month	If a pass is assigned on December 22nd, it should not be used before January 1st. Early or unassigned usage will result in an unauthorized 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.

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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.

Employee Smart Cards:	
› Smart Card Management	
› Order New Smart Cards	←
› Order Senior/TAP Cards	
› Confirm Received Smart Cards	
› Assign Smart Cards on Hand	
› Report Lost/Damaged Card	
› Download Active Smart Card List	
› Roster Download/Upload Tool	

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.

Order New Smart Cards

The MBTA recommends that you keep a limited supply of Smart Cards on hand for new employees. These Smart Cards are free and your company will not be billed for the pass values until you activate the card. Please note that these cards are the sole responsibility of your company. The MBTA reserves the right to bill your company for any Smart Cards that are fraudulently activated and used.

Any Smart Cards ordered between the 1st and the 15th of the month will be delivered by the 27th of that month.

Product Description	Unit Price	Quantity	SubTotal
** New CharlieCard - Monthly Inner Express Bus Pass **	\$0.00	<input type="text"/>	
** New CharlieCard - Monthly LinkPass **	\$0.00	<input type="text"/>	
** New CharlieCard - Monthly Local Bus Pass **	\$0.00	<input type="text"/>	
** New CharlieCard - Monthly Outer Express Bus Pass **	\$0.00	<input type="text"/>	
Subtotal:		0	\$0.00

Submit

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**.

Employee Smart Cards:

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- > [Order New Smart Cards](#)
- > [Order Senior/TAP Cards](#)
- > [Confirm Received Smart Cards](#)
- > [Assign Smart Cards on Hand](#)
- > [Report Lost/Damaged Card](#)
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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 reduced-fare 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.

Active Reduced-Fare LinkPass Orders

First Name	M.I.	Last Name	Senior / TAP Serial #	Price
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$30
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$30
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$30
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$30
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$30
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$30
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$30

Need more rows?

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.


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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	Unit Price	Quantity	SubTotal
Express Bus				
BUSINX	Inner Express Bus Pass	\$136.00	<input type="text" value="2"/>	\$272.00
BUSOTX	Outer Express Bus Pass	\$168.00	<input type="text"/>	
Commuter Boat				
BOAT	Commuter Boat Pass	\$329.00	<input type="text" value="3"/>	\$987.00
Commuter Rail				
10ZON1A	10-Ride CR (Senior / T.A.P Fare) Zone 1A	\$11.00	<input type="text"/>	
10ZON1	10-Ride CR (Senior / T.A.P Fare) Zone 1	\$32.50	<input type="text"/>	

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**.


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Product Description	Unit Price	Quantity	SubTotal
Daily Passes			
1 Day Link Pass	\$12.75	<input type="text" value="0"/>	
7 Day Link Pass	\$22.50	<input type="text" value="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.

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Current Order Summary

Your current pending order is shown below. To modify this pending order total, make changes to the Smart Card or Flash Passes tab and save them. Your order will lock and then post at 12:00am on **11/16/2018**. Please contact customer service at (888)-844-0353 or passprogram@mbta.com if you have changes to your Account Information.

[\[Simple View\]](#) [\[Detail View\]](#) [\[Print Invoice with Detail\]](#)

Order Information	
MBTA Pass Program PO Box 845831 Boston, MA 02284-5831 (888) 844-0353	Invoice #: 295116 Order #: (NEW ORDER) Order Date: Benefit Month: November, 2018 Pass Program: Corporate Account #: M3623

Address Information	
Billing SQA Test Company ATTN: SQA Team and rich 10 Park Plaza Suite 4730 Boston, MA 02116	Shipping Edit 56 Park Plaza AFC ITD Department 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 last day of the month 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.

Serial #	Status	Monthly Product	Employee Info	Employee #
[Redacted]	Active Active Remove from Account	Local Bus Monthly Pass Adult	First: [Input] M.I.: [Input] Last: [Input]	[Input]

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 Received Smart Cards

Use this section to confirm receipt of Smart Cards. Please note that all cards must be confirmed by the first Friday of the month after receipt. Cards not confirmed will be promptly deactivated. [You can access a user guide for the card confirmation steps here.](#)

For cards successfully received in the mail, please select the Smart Cards and click **Confirm selected Smart Cards**. These cards will remain activate and can be assigned to employees either immediately or at a later date. The MBTA does not begin billing for unused cards unless they are assigned.

For cards not received, simply select the serial numbers in question and click **Unaccount Selected Smart Cards** to report them missing. You will not be charged for cards reported as not received.

Filter Products:

Number of unconfirmed cards (with the selected product filter): 54

<input type="checkbox"/>	Serial #	Monthly Product
<input type="checkbox"/>	[Redacted]	Outer Express Bus Monthly Pass
<input type="checkbox"/>	[Redacted]	Monthly Link Pass
<input type="checkbox"/>	[Redacted]	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.

Assign Smart Cards on Hand

Select the Smart Cards you want to assign, making sure that each card has an employee name or ID associated with it. Click **Assign Selected Smart Cards**.

Filter Products:

Assign Selected Smart Cards

<input type="checkbox"/>	Serial #	Monthly Product	Last Name	First Name	M.I	Employee #
<input type="checkbox"/>		Local Bus Monthly Pass Adult	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>		Monthly Link Pass	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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.

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>	Assign Smart Cards on Hand
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>	Roster Download/Upload Tool



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 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 Smart Card 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 Smart Cards available by clicking on the "Activate Cards" section on the left panel of this screen.

Serial Number:

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.

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 Smart Card 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 Smart Cards available by clicking on the "Activate Cards" section on the left panel of this screen.

Report Lost/Damaged Smart Card Detail

Serial No:	
CharlieCard Status:	
Monthly Product:	
Employee Number:	
First Name:	
Middle Initial:	
Last Name:	
Email:	
Phone:	

Please select a new Unassigned Smart Card from the list below to assign to the employee.

Assign New Smart Card

If you do not have Smart Cards to assign, click here:

Replacement Employee Flash Pass

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.

Serial #	Status	Monthly Product	Employee Info	Employee #
1004 [Redacted]	<input type="text" value="Active"/> <input type="text" value="Active"/> <input type="button" value="Remove from Account"/>	Monthly Link Pass	First: <input type="text" value="[Redacted]"/> M.I.: <input type="text"/> Last: <input type="text" value="[Redacted]"/>	<input type="text"/>

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.