

MBTA Corporate Pass Program - User Guide



CharlieCard Customer Service

1-888-844-0353

passprogram@mbta.com

Monday through Friday 7AM to 8PM EST

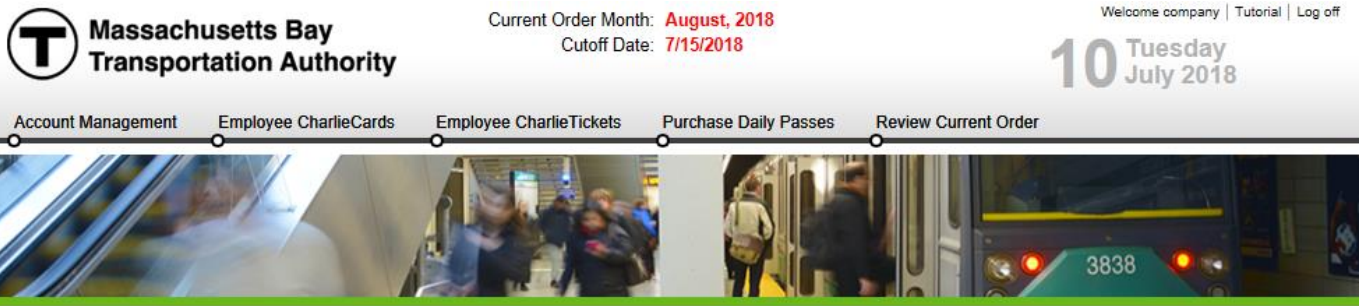
Saturday and Sunday 9AM to 5PM EST



WELCOME

Welcome to the MBTA Corporate Pass Program. This short guide will show you how to order CharlieCards and CharlieTickets, confirm and activate your CharlieCards, and manage your pass program online. Corporate Pass Program orders are split between three different sections:

- 1) CharlieCards for Employees: Monthly LINK and Bus passes are managed in this section
- 2) CharlieTickets 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 each month as needed

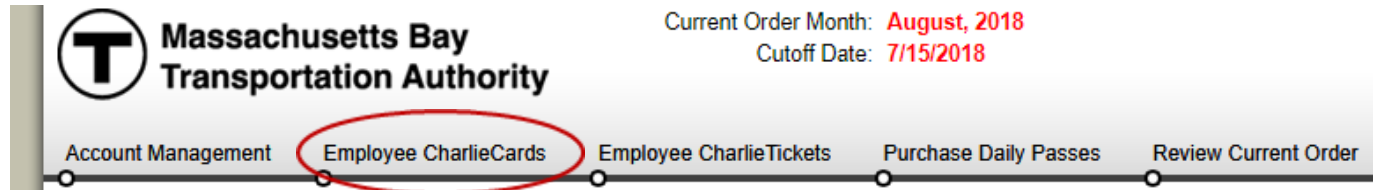


- Account Management
- Employee CharlieCards
- Employee CharlieTickets
- Purchase Daily Passes
- Review Current Order

BLANK CHARLIECARDS		(FULFILLED SEPARATELY FROM CHARLIETICKETS)
If you place an order:	Your CharlieCards 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 CharlieCards no later than February 27th.

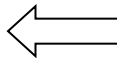
PLACE ORDERS

Under the **Employee CharlieCards** tab,



Select **Order New Cards**.

- Employee CharlieCards:
- CharlieCard Information
- Confirm Cards
- Activate Cards
- Order Senior/TAP Cards
- Order New Cards
- Report Lost/Damaged Card
- Download CharlieCard Orders



Enter the quantity of CharlieCards you want to order and then click “Submit” when you are finished. Note there is no cost associated with new CharlieCards until they are confirmed and activated. Active CharlieCards will be loaded with the applicable product the following month and included on your monthly invoice. These orders will reoccur monthly until cards are removed from accounts.

Order New CharlieCards

The MBTA recommends that you keep a limited supply of CharlieCards on hand for new employees. These CharlieCards 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 CharlieCards that are fraudulently activated and used.

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

PRODUCT DESC	UNIT PRICE	QUANTITY	SUBTOTAL
** New CharlieCard - Monthly Inner Express Bus Pass **	\$0.00	<input type="text" value="10"/>	\$0.00
** New CharlieCard - Monthly LinkPass **	\$0.00	<input type="text" value="10"/>	\$0.00
** New CharlieCard - Monthly Local Bus Pass **	\$0.00	<input type="text" value="10"/>	\$0.00
** New CharlieCard - Monthly Outer Express Bus Pass **	\$0.00	<input type="text" value="10"/>	\$0.00
Subtotal:		40	\$0.00

Submit

If you have employees using Senior or TAP passes, select the **Order Senior/TAP Cards** option, enter the participant's information and click on Submit.

- Employee CharlieCards:
- CharlieCard Information
- Confirm Cards
- Activate Cards
- Order Senior/TAP Cards ←
- Order New Cards
- Report Lost/Damaged Card
- Download CharlieCard Orders

To order CharlieTickets click on the **Employee CharlieTickets** tab,

Massachusetts Bay Transportation Authority

Current Order Month: **August, 2018**
Cutoff Date: **7/15/2018**

Account Management Employee CharlieCards **Employee CharlieTickets** Purchase Daily Passes Review Current Order

CharlieTicket: Fare Media Products

Before you order, make sure you are familiar with the current MBTA CharlieTicket Return Policy. [Click Here to View.](#)

and enter the number of tickets you need for the benefit month and then click "Update Current Order".

PRODUCT ACRONYM	PRODUCT DESCRIPTION	UNIT PRICE	QUANTITY	SUBTOTAL
Express Bus				
BUSINX	Inner Express Bus Pass	\$128.00	<input type="text"/>	
BUSOTX	Outer Express Bus Pass	\$168.00	<input type="text" value="5"/>	\$840.00
Commuter Boat				
BOAT	Commuter Boat Pass	\$308.00	<input type="text"/>	
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	\$31.00	<input type="text"/>	
10ZON2	10-Ride CR (Senior / T.A.P Fare) Zone 2	\$33.50	<input type="text"/>	

Under the **Purchase Daily Passes** tab,

The screenshot shows the Massachusetts Bay Transportation Authority logo on the left. To the right, the text reads "Current Order Month: August, 2018" and "Cutoff Date: 7/15/2018". Below this is a horizontal navigation bar with five tabs: "Account Management", "Employee CharlieCards", "Employee CharlieTickets", "Purchase Daily Passes", and "Review Current Order". The "Purchase Daily Passes" tab is circled in red.

Enter the quantity of passes you want to order and then click "Update Current Order"

PRODUCT DESC	UNIT PRICE	QUANTITY	SUBTOTAL
Daily Passes			
1 Day Link Pass	\$12.00	<input type="text" value="0"/>	\$0.00
7 Day Link Pass	\$21.25	<input type="text" value="10"/>	\$212.50
Total:			\$212.50

Update Current Order

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

This screenshot is similar to the first one, showing the Massachusetts Bay Transportation Authority logo and the same order details: "Current Order Month: August, 2018" and "Cutoff Date: 7/15/2018". The navigation bar is the same, but now the "Review Current Order" tab is circled in red.

BILLING

SQA Test Company
 ATTN: SQA Team and rich
 10 Park Plaza
 Suite 4730
 Boston, MA 02116

SHIPPING

56 Park Plaza
 AFC ITD Department
 Boston, MA 02116

[EDIT](#)

PRODUCT NAME	UNIT PRICE	QUANTITY	AMOUNT
** New CharlieCard - Monthly Inner Express Bus Pass **	\$0.00	100	\$0.00
** New CharlieCard - Monthly LinkPass **	\$0.00	45	\$0.00

PRODUCT NAME	UNIT PRICE	QUANTITY	AMOUNT
7 Day Link Pass	\$21.25	10	\$212.50

PRODUCT NAME	UNIT PRICE	QUANTITY	AMOUNT
Commuter Rail Interzone 3	\$119.75	41	\$4,909.75
Outer Express Bus Pass	\$168.00	5	\$840.00

PAYMENTS [EDIT](#)

Please make a check payable to:

MBTA Corporate Lockbox
 PO Box 845831
 Boston, MA 02284-5831

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

MBTA Corporate Lockbox
 Attn: Lockbox Operations, P.O. Box 845831
 1 Cabot Road, Suite 202
 Medford, MA 02155

Total Items: 201

Subtotal: \$5,962.25

Adjustment Total: \$0.00

Shipping: \$0.00

Order Total: \$5,962.25

Previous Balance:

(Ignore if paid) (\$408.00)

Total Balance: \$5,554.25

Both your CharlieTicket and your CharlieCard 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 period, you can change the status of your CharlieCards. If you activate 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.

SERIAL #	STATUS	MONTHLY PRODUCT	EMPLOYEE INFO	EMPLOYEE #
1000164778	<input type="button" value="Remove from Account"/> <input type="button" value="Active"/> <input type="button" value="Remove from Account"/>	<input type="button" value="Monthly Link Pass"/>	First: <input type="text"/> M.I: <input type="text"/> Last: <input type="text"/>	<input type="text" value="100340553"/>

Please note that changes are NOT allowed to your CharlieTicket order.

PAYMENT

ACH processing occurs on the 16th or the next business day of each month.

CONFIRM CHARLIECARDS

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

Under the **Employee CharlieCards** tab, select Confirm Cards to view a list of your new cards. Select the check box next to the CharlieCards you received and click "Confirm selected CharlieCards".

Confirm Cards

Select the CharlieCards and click **Confirm selected CharlieCards** to confirm CharlieCards received.
 Click **Unaccount selected CharlieCards** to report CharlieCards not received.

Filter Products:

Number of unconfirmed cards (with the selected product filter): 1

<input checked="" type="checkbox"/>	SERIAL #	MONTHLY PRODUCT
<input checked="" type="checkbox"/>	1255526954	Monthly Link Pass

Click **Unaccount selected CharlieCards** to report any cards not received.

ACTIVATE CHARLIECARDS

You will need to activate CharlieCards prior to distributing them to employees. Select the check box beside the serial # and select **Assign selected CharlieCards** button. You may optionally enter a name and/or an ID for each employee.

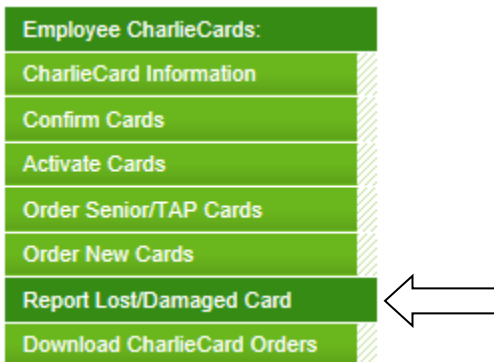
ASSIGN	SERIAL #	MONTHLY PRODUCT	LAST NAME	FIRST NAME	M.I	EMPLOYEE #
<input checked="" type="checkbox"/>	2875252466	Local Bus Monthly Pass Adult ▼	Lisa	Mitchell	<input type="checkbox"/>	12345
<input checked="" type="checkbox"/>	3417432563	Local Bus Monthly Pass Adult ▼			<input type="checkbox"/>	57896

You can do this manually or if you have more than 100 participants, call customer service and we can assist you. If you do not have any cards shown on this screen you will need to select the **Confirm Cards** button and follow the steps.

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

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



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:

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 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.

REPORT LOST/DAMAGED CHARLIECARD DETAIL

Serial No:	1000739423
CharlieCard Status:	Active
Monthly Product:	Monthly Link Pass
Employee Number:	100368611
First Name:	
Middle Initial:	
Last Name:	Sam
Email:	
Phone:	

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

-- Select One -- ▼

If you do not have a replacement card, you have the option to request a replacement CharlieTicket to use for the remainder of the current month.

If you do not have CharlieCards to assign, click here:

Please remember to order a blank CharlieCard for the next benefit month before the 15th at 11:59 PM EST by choosing the **Order New Cards** button and submitting an order.

If an employee is no longer eligible or terminates their participation, edit the status of the CharlieCard to Remove from Account. Click on the **Employee CharlieCards** tab; 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 #
1013606242	<input type="button" value="Remove from Account"/> ▼ Active <input type="button" value="Remove from Account"/>	<input type="button" value="Monthly Link Pass"/> ▼	First: <input type="text" value="Joe"/> M.I.: <input type="text"/> Last: <input type="text" value="Smith"/>	<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 Account Management.

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:	Jane Doe
Address 1:	1 Main Street
Address 2:	
City:	Boston
State:	MA
Zip:	02116
Country:	USA
Email Address:	Jane_Doe@mycom.com
Phone:	617-555-2222
Fax:	
Note 1:	New company sign up from CorporateProgram

CONTACT US

Thank you for reading this guide.

If you have any questions, please refer to our **frequently asked questions** or call our toll free number 888-844-0353.