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1 **OVERVIEW**

The MBTA has moved the Student Pass Program online, allowing schools to place orders for CharlieCards and manage those cards themselves.

This guide shows you how to order CharlieCards, activate your CharlieCards and manage your pass program online.

The MBTA Student Pass Program is accessed online at [https://passprogram.mbta.com](https://passprogram.mbta.com).

2 **REGISTRATION**

To get started you need to register your school for an account.

1. Click the **Register Now** link on the welcome page to open the New to Pass Programs page.
2. Scroll down to the bottom of the New to Pass Programs page and under the Student Program section, click the click here link to open the School Registration page

3. Fill out the registration form online
4. Review the Terms and Conditions of User for Student Pass Participants, and the MBTA’s Website and Electronic Fare Media Privacy Policy – both located at the bottom of the registration form
5. Select the checkbox acknowledging acceptance of the MBTA’s Terms & Conditions
6. Select the checkbox acknowledging the MBTA’s Privacy & Policy Statement
7. Click the Sign Up button
8. 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 application. Once your account has been approved the School contact designated on the registration form will receive an e-mail notification authorizing login. You can now login with the username and password you designated at time of registration.
3 **PAYMENT INFORMATION**

The first time you login the Payment Methods page is displayed. 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.

![Payment Methods Page](image)

**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. To securely edit your bank account information, click *Edit*. Your ACH will take place on the 10th of every month (or the next business day after the 10th).

**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: ACH

**PAYING BY ACH**
Bank Account Type: BusinessChecking
Name of Bank: *My Bank*
Name on Bank Account: *My Name*
Routing No: ******5555
Account No: ******6666

The sample check graphic below shows where ABA check routing and account numbers can be found on your check.
4 **Add Users**

After configuration 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. New users are added as Pass Administrators which allows them to manage CharlieCard ordering and activation. Any Account changes, including adding additional users, are managed by the Super User.

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

Click [Here](#) to View a Tutorial on the Program.
6 **PLACE ORDERS**

Sign into the pass program 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 required
4. Click on I agree and accept the Terms and Conditions
5. Submit button will present
6. Click Submit

**Note:** There is no cost associated with new CharlieCards until they are activated by assigning. Active CharlieCards will be loaded with the applicable product and included on your monthly invoice.
7 **ACTIVATING CHARLIE CARDS**

CharlieCards need to be activated prior to distribution to students.

1. Click on CharlieCard Management
2. Select Activate Cards
3. Select the checkbox beside each card to be assigned and, if desired, enter a Student #
4. Click the **Assign selected CharlieCards** button

5. Click on **Confirm and assign for usage**.
8 **Removing Active CharlieCards**

Your school or institution will be charged for all **Active** CharlieCards on a monthly basis. If an Active CharlieCard is no longer needed, you must change the card status to **Remove from Account**.

1. Click on CharlieCard Management
2. Select CharlieCard Status
3. Change the Status to ‘Remove from Account’
4. Click on Update CharlieCard Account
9 **BULK CHARLIECARD UPDATES**

1. Click on Review Current Order
2. Select the Order Roster Uploader
3. Click the **Export Current Order Roster** button to obtain an excel file of your current CharlieCards

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

   The current status of each card is noted in column **N** of the downloaded spreadsheet.

   - To activate a card: change the Status Codes from U (Unassigned) to A (Active)
   - Note: Cards cannot be changed from Active or Removed from Account to Unassigned
   - Personal Information (Name, email) is NOT collected on Students however, if you choose to, a Student ID may be entered in the UserID field (column K).
   - To ignore a card: place a U in the cell

   **Name fields will be blank for the Student Program, so any values entered will not be saved.**

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

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

12 BALANCE SUMMARY

You can view all of your invoice and payment transactions.

1. Click on Review Current Order
2. Select Balance Summary
13 REPORT LOST/DAMAGE CHARLIE CARDS

To report a lost or damaged card you will need the card serial number. Once submitted, the old card will no longer be usable. If you do not have a replacement card available you can submit an order for a replacement card after the lost/damaged card has been reported.

1. Click on CharlieCard Management
2. Select Report Lost/Damaged Card
3. Enter the CharlieCard serial number and click 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 ticket will be provided by the MBTA Pass Program Administrator.
5. If available, select the new card to be assigned from the dropdown menu of available cards
6. Click 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 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](image)

15 **MBTA CONTACT INFORMATION**

If you have any questions, please refer to our [frequently asked questions](#) or call our number (617) 222-5710.