MBTA Student Pass Program User Guide

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

This guide shows you how to order CharlieCards, activate your CharlieCards, and manage your Student Pass program online. The MBTA Student Pass Program can be 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. Click the **Middle & High School Students** button to navigate to the Student Pass Program application.

![Student Program: For Middle and High Schoolers on the Go](image)

- Fill out the registration form online
- 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
- Select the checkbox acknowledging acceptance of the MBTA’s Terms & Conditions
- Select the checkbox acknowledging the MBTA’s Privacy & Policy Statement
- Click the **Sign Up** button
- 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 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.

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**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:**

- [ ] Pay by ACH
- [ ] Pay by Check
- [ ] Paymode
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 can be 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

![Add New User](image)

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 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 required
4. Click on I agree and accept the Terms and Conditions
5. Submit button will present
6. Click **Submit**

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**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: Academic Year 2018/2019**

<table>
<thead>
<tr>
<th>Product Desc</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>SubTotal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New CharlieCard 7 Day Student Pass</strong></td>
<td>$0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>New Student Stored Value CharlieCard</strong></td>
<td>$0.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

CharlieCards need to be activated prior to distribution to students.

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 #
4. Click on Assign Selected CharlieCards to complete the assignment and activation process.
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 CHARLIE CARD UPDATES

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

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**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.

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**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

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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.**
a. Save the roster as an XLS file and note the file save location
b. Return to the Roster Tool page and under Roster Upload select Choose File
c. Select your updated file from the file save location and click on Open
d. Click on the Upload New Order Roster button
e. View Validation Result and address any errors in file. Go back and re-upload the file if changes are necessary
f. 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 following month.

12 **Balance Summary**
You can view all of your invoice and payment transactions.
1. Click on **Review Current Order**
2. Select **Balance Summary**

![Balance Summary Table]
13 **REPORT LOST/DAMAGE 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. Replacement cards must be ordered immediately after reporting a card lost or damaged. Logging off and placing an order later produces a new order, thus additional charge when the card is 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]

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

![Report Lost/Damaged CharlieCard Detail]

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

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**

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

<table>
<thead>
<tr>
<th>Contact Person:</th>
<th>SQA Team and rich</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 1:</td>
<td>10 Park Plaza</td>
</tr>
<tr>
<td>Address 2:</td>
<td>Suite 4730</td>
</tr>
<tr>
<td>City:</td>
<td>Boston</td>
</tr>
<tr>
<td>State:</td>
<td>MA</td>
</tr>
<tr>
<td>Zip:</td>
<td>02116</td>
</tr>
<tr>
<td>Country:</td>
<td>USA</td>
</tr>
<tr>
<td>Email Address:</td>
<td><a href="mailto:maxplanck@sillymail.com">maxplanck@sillymail.com</a></td>
</tr>
<tr>
<td>Phone:</td>
<td>617-222-4226</td>
</tr>
<tr>
<td>Fax:</td>
<td></td>
</tr>
<tr>
<td>Note 1:</td>
<td>New company sign up from CorporateProgram</td>
</tr>
</tbody>
</table>

**Edit**

15 **MBTA CONTACT INFORMATION**

If you have any questions, please email studentpassprogram@mbta.com or call our number 617-222-5710.