

How to Submit a Trip Planner with WMATA SmartBenefits® Application

1. Click on <https://www.wmata.com/> for Metro
Or
<https://www.commuterdirect.com/> for Marc/ Commuter Bus/ VRE
2. Enter from and to destination information. (The below instructions are for Metro; follow the instructions on the website for Commuter Direct.
3. Click on “More Options”.
4. Click on mode of transportation, e.g. bus, rail or both.
5. Select leave at or arrive by time.
6. Select the time you want to leave or arrive by.
7. Click “Plan My Trip”.
8. Print itinerary and attach it to your transit application.
9. Email signed application and trip planner itinerary to MissionSupport@frtib.gov.

**Federal Retirement Thrift Investment Board
SmartBenefits® Program Application**



SmartBenefits® is the "electronic" way to receive your Subsidy Benefits. Your Metrocheck transit benefits are electronically added each month to your Washington Metropolitan Area Transit Authority (WMATA/ Metro) registered SmarTrip® card. The SmarTrip® card is a permanent plastic farecard that you register with WMATA.

Rules of Participation

1. Federal Retirement Thrift Investment Board employees who receive a transit subsidy, and use ALL of their benefits on Metrorail, Metrobus, Metro-authorized van pools, DC Circulator Bus, Fairfax Connector, DASH, CUE Bus, Loudoun County Transit, PRTC Omni Ride or the Ride-On Bus are required to participate in the SmartBenefits® Program.
2. Participants must provide the serial number of a registered Metro SmarTrip® Card when applying for SmartBenefits®. If you have not registered your card or are unsure if it is registered, you must do so by calling WMATA at (202) 962-5719 or login to <https://smartrip.wmata.com> to register your SmarTrip® Card.
3. All federal employees who participate in the SmartBenefits® Program must authorize the Federal Retirement Thrift Investment Board to verify the accuracy of their name, and registered card number assigned to their SmarTrip® Card.
4. You must attach a legible, enlarged photocopy of the back of your SmarTrip® Card to this application.
5. SmartBenefits® are provided to recipients on a monthly basis. SmartBenefits® may be add to your SmarTrip® Card between the 1st and 5th day of each month by adding the benefit to your SmarTrip® Card at Metro Passes/Fare cards machines. Once downloaded, existing balances will remain on your card. However, unclaimed benefits for a given month may not be claimed once the month has passed.
6. SmartBenefits® not claimed during the intended month are returned to the Federal Retirement Thrift Investment Board.
7. Funds cannot be removed from your SmarTrip® card once added. Since the subsidy is given in advance, if you leave the FRTIB, you will have to pay back any benefits owed by personal check, or you may elect to have any outstanding subsidy balance deducted from your final FRTIB paycheck.
8. It is illegal to use transit subsidy benefits to pay for parking. Employees parking at Metro operated parking lots paying for parking with their SmarTrip® card must do so by adding funds by cash, credit or debit card to their SmarTrip® card to cover parking expenses.

If you do not currently have a SmarTrip® Card, you can purchase one online at <https://smartrip.wmata.com/Storefront>. Be sure to register it at the time of purchase. You may visit Metro's website for more information at <http://www.wmata.com> (click on SmarTrip®).

Employees who misuse transit subsidies in any way will be subject to appropriate disciplinary action.

**Federal Retirement Thrift Investment Board
SmartBenefits® Program Application**



Frequently Asked Questions

Q: Is it important to register your SmarTrip® card?

A: YES! Without a registered SmarTrip® card, there is no way to apply your transit benefit to your SmarTrip® account.

Q: If I lose the card or if it is stolen, what happens?

A: The SmarTrip® card can be replaced without losing any of the fare value on the card with a simple phone call to Metro at (202) 962-5719.

Q: Can my SmartBenefits® be used for parking?

A: You cannot use transit benefits added to a SmarTrip® card to pay for parking at Metrorail parking lots. A good idea would be to add extra money to your SmarTrip® card to cover the parking fees. Just remember that it is against the FRTIB Transit Program Rules to include any amount you spend on parking in your application, so do not include parking costs in your monthly estimate for transit expenses.

Q: Will my personal money be taken from my SmarTrip® card account?

A: No. Funds added to your account cannot be taken from your account. In addition, once you have claimed your SmartBenefits®, they are yours until you use them.

Q: Where can I pick up my SmartBenefits®?

A: Once you are enrolled in SmartBenefits® you will be able to claim your benefits directly from any Passes/ Farecards machine located at the Metrorail stations. Just add the benefits reserved for you to your registered SmarTrip® card by following the steps listed on the machine.

Q: Will Metro track where I go on Metrorail?

A: Yes, Metro does track information related to where and when you use your SmarTrip® card; every transaction on the SmarTrip® Card is recorded. Metro may disclose information pursuant to applicable laws or for law purposes.

Q: If I am a senior citizen or disabled Metro rider, do I need to do anything differently to join SmartBenefits®?

A: Yes, you must purchase a Senior Citizen or Disabled SmarTrip® card with a valid Metro ID before enrolling in the SmartBenefits® Program. That card must also be registered.

Q: Will I receive the discounted fare onto my Senior Citizen or Disabled SmarTrip® card for SmartBenefits®?

A: Yes, once you have purchased your Senior Citizen or Disabled SmarTrip® card the SmarTrip® card is encoded to charge the discounted fare.

Federal Retirement Thrift Investment Board Mass Transportation Benefits Program Application

1. APPLICANT INFORMATION

a. LAST NAME	b. FIRST NAME	c. MIDDLE INITIAL
d. RESIDENCE (CITY)	e. STATE	f. ZIP CODE
g. SMARTTRIP CARD SERIAL NUMBER	h. IS YOUR SMARTTRIP CARD REGISTERED?	

2. MASS TRANSPORTATION EXPENSE - Calculate your total monthly transit expense by the way you pay for your **roundtrip daily commute to and from work**. Using the worksheet below, select your mode of mass transportation and identify the roundtrip cost based on how you pay (i.e., daily, weekly, and monthly) for your fare and convert all costs to a total monthly amount. **The IRS max allowable benefit is \$265. Remember:** Parking fees are not allowed and cannot be included when computing monthly transit costs. Please see the Qualified Parking section of this worksheet.

a. MODE OF TRANSPORTATION		b. DAILY EXPENSE	c. WEEKLY EXPENSE	d. MONTHLY EXPENSE
METRO RAIL	FROM WHAT STATION/TO WHAT STATION			
METRO BUS	BUS NUMBER			
BUS	NAME OF COMPANY			
TRAIN	NAME OF COMPANY/STATION			
VANPOOL	NAME OF COMPANY			
OTHER	NAME OF COMPANY			
TOTAL DAILY COST:				

3. CONVERTING DAILY AND WEEKLY COST TO MONTHLY COST

a. DAILY CONVERSION										
Days Per Month		AWS Days Per Month		Telework Days Per Month		Total Days Per Month		Daily Expense		Total Cost Per Month
22	-		-		=		X		=	
b. WEEKLY CONVERSION (If applicable)										
Weekly Expense				Weeks Per Month			Total Cost Per Month			
\$				X			\$			
				4						

4. QUALIFIED PARKING EXPENSE - The Definition of Qualified Parking under this program is "Parking provided to employees near a location from which employees commute to work by commuter highway vehicle, mass transit station, or vanpool." This program allows employees to pay for qualified parking expenses on a pre-tax basis, eliminating federal, state, and social security taxes." **IRS limits the amount of qualified parking that may be excluded from your taxable income to \$265.**

a. PARKING INFORMATION		b. DAILY EXPENSE	c. WEEKLY EXPENSE	d. MONTHLY EXPENSE
NAME OF PARKING FACILITY				

WARNING: This Certification concerns a matter with the jurisdiction of an agency of the United States and making a false, fictitious, or fraudulent certification may render the maker subject to criminal prosecution under Title 18, United States Code, Section 1001; Civil Penalty Action, providing for administrative recoveries of up to \$10,000 per violation; and/or agency disciplinary actions up to and including removal from the Federal Service.

- * I certify that I am employed by the Federal Retirement Thrift Investment Board and am not named on a federally subsidized workplace parking permit with the FRTIB or any other federal agency.
- * I certify that I am eligible for a public transportation fare benefit, will use it only for my daily commute to and from work, will not transfer it to anyone else, and will not allow anyone else to use it.
- * I certify that the monthly transportation benefit I am receiving does not exceed my monthly commuting cost.
- * I certify that upon separation from the FRTIB I will return unused fare media.
- * I certify that I will notify the Administration Office of any changes in my status, i.e., change in home address or change in commuting pattern.
- * I certify that I will not include parking costs in the Mass Transportation Expense section.
- * I certify that I am not a member of a carpool and I do not receive disability or executive parking privileges.
- * I certify the information I have provided is true and accurate.
- * I certify that I will not use the pre-tax fringe benefit for parking at or near the FRTIB.

a. Employee Signature	b. Date Signed
-----------------------	----------------

5. SUPERVISOR CERTIFICATION OF WORK SCHEDULE

a. Supervisor Signature	b. Date Signed
-------------------------	----------------

PRIVACY ACT OF 1974

The basic authority for requiring the requested information is contained in 5 U.S.C. § 7905 and 26 U.S.C. § 132. Disclosure of the data by you is voluntary. The principal purpose for collecting the data is to determine your eligibility for and amount of reimbursement to you for expenses incurred in commuting to and from work. Information may be disclosed to appropriate Federal, State, or local agencies when relevant to civil, criminal or regulatory investigations or prosecutions. There is no personal liability to you if you do not furnish the requested information; however, you will not be reimbursed for your expenses.