

# MBTA Perq for Work Administrative User Guide

Updated June 2024



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Monday through Friday 7AM to 8PM EST  
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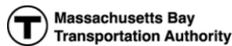
## Welcome to the MBTA Perq for Work Program

Perq is the MBTA sales channel designed specifically for employers. This short guide will show you how to order MBTA products on behalf of employees, directly from the T through the [Perq Administrative Portal](#) confirm and assign your products, and manage your organization's order online.

The MBTA sends your order right to your office. With Perq, employees are charged for their passes with pretax payroll deductions, saving them money off the typical price. You can also choose to subsidize passes further by deducting less than the full cost from your employees' paychecks.

## Registration

To get started, you need to register your company for a Perq for Work Pass Program account. Please go to [passprogram.mbta.com](http://passprogram.mbta.com) and click **Perq for Work Program**



[MBTA Home](#)

[Business Center](#)

[Buy Individual Passes](#)

[Accessibility](#)

- **Perq for Work Program**
- Semester Program
- University Program
- Middle & High School Students
- Group Orders
- Field Trip Form

Log in or Sign up

User Name:

Password:

[Forgot password?](#)

## Company Registration

Please upload a W-9 from your organization to complete this application

- Perq is the leading transit benefit program in the Greater Boston Area. In order to register as an employer with the Perq for Work program, fill out and submit form below. Please ensure that you also submit a signed W-9 form (preferably as a PDF) in the document upload section below
- Once an application has been received, the MBTA will review your materials and either send an approval notification or request more information within 1-2 business days

Federal Tax ID (EIN): \*

Company Name: \*

Fill out the registration form and have your signed W-9 form ready as you will need to upload the form during this process.

## Perq Administrative Site User Types

**Super-user** - Can change financial, billing, and shipping address information, or create access rights for other administrative staff.

When the Super User first logs into the Perq Administration System, they will see the "Paying by ACH" screen when they log in. You can also pay by check.

Only one person at each company can be a super-user. If a super-user leaves your company, you must email a formal letter on company letterhead and a brief note that explains which user is leaving and who will replace them to [passprogram@mbta.com](mailto:passprogram@mbta.com).

The letter should include:

- Company name
- Company number
- Address
- Federal tax ID
- New user email

**Administrator** - Can place or make modifications to orders and register new employees. They cannot change banking, billing, or shipping information.

There is no limit to the number of administrators for each company.

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.

## 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. Enter the quantity of Smart Cards you want to order and then click **Submit** when you are finished.

Account Management	Employee Smart Cards	Employee Flash Passes	Purchase Daily Passes	Review Current Order
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<b>Employee Smart Cards:</b> <ul style="list-style-type: none"><li>• Smart Card Management</li><li>• Order New Smart Cards</li><li>• Order Senior/TAP Cards</li><li>• Confirm Received Smart Cards</li><li>• Assign Smart Cards on Hand</li><li>• Report Lost/Damaged Card</li></ul>	<h3>Smart Card Management</h3> <p>Use the following fields to search for Smart Cards within your Perq Account:</p> <p><b>Smart Cards Lookup</b></p> <p><b>Division</b> <input type="text" value="-"/></p> <p><b>Employee No.</b> <input type="text"/></p> <p><b>Employee Name</b> <input type="text" value="First"/> <input type="text" value="M.I"/> <input type="text" value="Last"/></p> <p><b>Email Address</b> <input type="text"/></p> <p><b>Serial No.</b> <input type="text"/></p>
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We recommend that you keep a small inventory of blank Smart Cards to easily replace or assign new employee cards. 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.

If you have employees who utilize a Senior or TAP fares, they can still access their reduces rate via your order. Note: you will need to have their current Senior/TAP serial number (starting with 5-) to confirm their eligibility

Account Management	Employee Smart Cards	Employee Flash Passes	Purchase Daily Passes	Review Current Order
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## Ordering Flash Passes: Commuter Rail and Ferry

You will be charged for each Flash Pass on the 16<sup>th</sup> of the month prior to the “benefit month”, as these passes are valid for use as soon as the month printed begins.

Unused Flash Passes can be returned using our [Flash Pass Return Form](#). Note: To receive refund credit, all employee Flash Pass returns must be received by the first Monday of the month that is printed on the card.

To Order, click the **Employee Flash Passes** tab. Flash Passes can be ordered 2 ways: in bulk, or with the roster upload tool.



**Employee Flash Passes:**

- Order Flash Passes
- Build Roster 
- Edit Roster
- Order in Bulk 



### Order Flash Passes

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

#### Order using a Flash Pass roster **NEW**

With a Flash Pass employee roster you can:

- Order Commuter Rail and Ferry passes
- Link an employee's information to their Flash Pass product
- View and employee's Flash Pass transaction history
- Pause an employee's Flash Pass subscription

Bulk Ordering let's you enter the number of passes you need for the benefit month and distribute cards when they arrive. Under Employee Flash Passes, click **Order in Bulk** then click **Update Current Order**.

Product Acronym	Product Description	Unit Price	Quantity	SubTotal
<b>Express Bus</b>				
BUSINX	Express Bus Pass	\$136.00	<input type="text" value="66"/>	\$8,976.00
BUSOTX	Outer Express Bus Pass	\$168.00	<input type="text"/>	
<b>Commuter Boat</b>				
BOAT	Commuter Boat Pass	\$329.00	<input type="text" value="31"/>	\$10,199.00
<b>Commuter Rail</b>				
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"/>	
10ZON2	10-Ride CR (Senior / T.A.P Fare) Zone 2	\$35.00	<input type="text"/>	
10ZON3	10-Ride CR (Senior / T.A.P Fare) Zone 3	\$40.00	<input type="text"/>	
10ZON4	10-Ride CR (Senior / T.A.P Fare) Zone 4	\$42.50	<input type="text"/>	
10ZON5	10-Ride CR (Senior / T.A.P Fare) Zone 5	\$47.50	<input type="text"/>	

The Roster Update Tool allows you to upload employee information to your order. You will need the to have their name, email address, and employee number (optional). ([Roster template](#))

**Note: before you order Flash Passes with a roster, adjust the Quantity column using the Bulk Order Tool.**

## 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**.

Account Management   Employee Smart Cards   Employee Flash Passes   **Purchase Daily Passes**   Review Current Order

**Purchase Daily Passes:**

- [DailyPasses Information](#)



### Daily Passes: One-time Pass Purchases

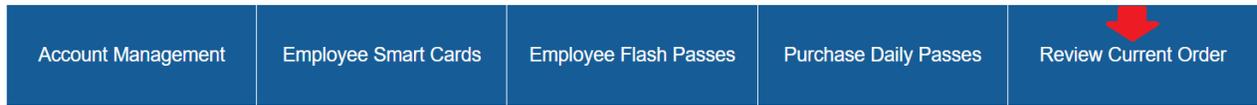
Remote workforce in town for the week? Team-building scavenger hunt next month? The MBTA makes it easy to purchase one day and seven day pass products to provide to staff and visitors. These passes are distributed on plastic Smart Cards and remain active for one year from the date your order locks.

**Please Note:** Daily Passes do not recur every month

Product Description	Unit Price	Quantity	Sub Total
<b>Daily Passes</b>			
1 Day Link Pass	\$11.00	<input type="text" value="0"/>	\$0.00
7 Day Link Pass	\$22.50	<input type="text" value="0"/>	\$0.00

## Reviewing Final Order and Adjustments

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



**Review Current Order:**

- [Current Order Summary](#)
- [Balance Summary](#)
- [Order History](#)
- [Adjustment Descriptions](#)



[\[Print Invoice Summary\]](#) [\[Print Invoice Detail\]](#)

# September 2023 Order

Pending until 12:00am on 11/15/2019

<b>Summary</b>	
September 2023	\$0.00
Adjustments	\$0.00
Shipping	\$0.00
Order Total	\$0.00
Previous Balance	\$0.00
<b>Total</b>	<b>\$0.00</b>

Both your Smart Card and your Flash Pass orders are recurring. If no changes are made, all orders are locked in at **11:59PM on the 15th of every month.**

After the 15th, you can change the status of your Smart Cards (bus and subway) only. If you assign an unassigned Smart 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. **Flash Passes (commuter rail and ferry) cannot be adjusted in this period, but can be [returned](#) once received by the 1<sup>st</sup> Monday of the Benefit Month.**

## Confirming Received Smart Cards

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 Received 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.

Account Management	Employee Smart Cards	Employee Flash Passes	Purchase Daily Passes	Review Current Order
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<b>Employee Smart Cards:</b>
• 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

## Smart Card Management

Use the following fields to search for Smart Cards within your Perq Account:

### Smart Cards Lookup

<b>Division</b>	<input type="text" value="-"/>
<b>Employee No.</b>	<input type="text"/>
<b>Employee Name</b>	<input type="text" value="First"/> <input type="text" value="M.I"/> <input type="text" value="Last"/>
<b>Email Address</b>	<input type="text"/>
<b>Serial No.</b>	<input type="text"/>
<b>Card Status</b>	<input type="text" value="Active"/>
<b>Monthly Product</b>	<input type="text" value="-"/>



## 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.

Flash Passes do not need to be confirmed or assigned.

Account Management	Employee Smart Cards	Employee Flash Passes	Purchase Daily Passes	Review Current Order
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<b>Employee Smart Cards:</b>	<h3>Smart Card Management</h3> <p>Use the following fields to search for Smart Cards within your Perq Account:</p> <p><b>Smart Cards Lookup</b></p> <p><b>Division</b> <input type="text" value="-"/></p> <p><b>Employee No.</b> <input type="text"/></p> <p><b>Employee Name</b> <input type="text" value="First"/> <input type="text" value="M.I"/> <input type="text" value="Last"/></p> <p><b>Email Address</b> <input type="text"/></p> <p><b>Serial No.</b> <input type="text"/></p> <p><b>Card Status</b> <input type="text" value="Active"/></p> <p><b>Monthly Product</b> <input type="text" value="-"/></p>
• 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	

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.

## Invoicing

You can preview your invoice by navigating to the “[review current order](#)” tab. You can opt for invoices to be

delivered via email by first going to the "account management" tab, and then "billing/shipping."



- Account Management:**
- Account Information
  - Change Password
  - Payment Information
  - Billing/Shipping
  - List Administrative Users



### Account Information

Please contact customer service at (888)-844-0353 or [passprogram@mbta.com](mailto:passprogram@mbta.com) if you have changes to your Account Information.

Account ID:	[Redacted]
Account Name:	[Redacted]
Federal Tax ID (EIN):	11-1234567
Company Industry:	Transportation
Employee Count Range:	1-19
Is your company planning on subsidizing passes?	Yes — 100%
I would like to talk to someone at the MBTA about commute options for our employees:	No
Notify Administrators of Digital Order (mTicket) Fulfillment Success and Failure:	No
Receive Invoice by Email?:	In-Active
Email Address:	[Redacted]

[Edit](#)

In some cases, you may see one or more of the following adjustments on your invoice:

- **Late Order Adjustment:** This occurs when riders leave or join your account or anytime a Smart Card is activated or deactivated in the latter half of the month.
- **Early Usage Adjustment:** This happens if a card is used "early," meaning a few days ahead of the next billing and use cycle.
- **Unassigned Usage Adjustment:** This happens if a card is used without being assigned to an employee first. We will charge the company it was issued to for a month of use and it remains valid for the

calendar month. Then, we will turn the card off.

## **Replacing Lost or Stolen Smart Cards**

If an employee loses their Smart Card, you will need to have the lost/stolen card number, which can be found using the lookup in the Employee Smart Cards Tab. Then, click on the **Report Lost/Damaged Card** button and follow the steps. (Note: do not use the “Unassign” function to remove a card). The lost/stolen card will no longer be usable in the system.



**Employee Smart Cards:**

- Smart Card Management
- Order New Smart Cards
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- Confirm Received Smart Cards
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- Download Active Smart Card List

### Smart Card Management

Use the following fields to search for Smart Cards within your Perq Account:

**Smart Cards Lookup**

**Division**

**Employee No.**

**Employee Name**

**Email Address**

**Serial No.**

**Card Status**

**Monthly Product**

Once you report a valid card lost or stolen, you can either replace it with a Smart Card you have on hand or to order a new Smart Card before the 15th at 11:59 PM EST by choosing the [Order New Cards](#) button and submitting an order. New cards ordered this way may take a few days to be shipped to your mailing location.

**Note:** Lost or stolen Commuter Rail or Ferry flash passes are not replaceable or refundable.

## **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.

**When you are finished entering information onto this page, please make sure to click on "Save" at the bottom.**

<u>Serial No.</u>	<u>Status</u>	<u>Monthly Product</u>	<u>Employee Name</u>	<u>Employee No.</u>	<u>Email Address</u>
100711817	Active Active Remove from Account	Local Bus Monthly Pass Adult	First* [REDACTED] M.I. Last* [REDACTED]	[REDACTED]	[REDACTED]

## Resources for employees

Your employees can order any one of the passes at [mbta.com/perq-products](https://www.mbta.com/perq-products). These are each monthly unlimited passes.

We've created a flyer to help introduce your employees to Perq, available at [mbta.com/perq-employee-handout](https://www.mbta.com/perq-employee-handout). In addition, we encourage you to communicate company-specific processes, including any subsidy you may be offering and internal deadlines around asking for a pass.

For riders who are new to the MBTA (or exploring changing their commute), we'd recommend visiting [mbta.com/trip-planner](https://www.mbta.com/trip-planner) to find their best route, [mbta.com/guides](https://www.mbta.com/guides) to learn more about using the system, or [mbta.com/fares](https://www.mbta.com/fares) to explore all of the T's fare options.

### Glossary:

**Perq** – This sales channel is designed specifically for employers who can order monthly passes for your employees.

**SmartCard** – Plastic card that can be loaded with different types of passes.

**Flash Pass** – Plastic card that specifies what type of pass your employee has. Shown to conductors on Commuter Rail and can be tapped for subway and bus access.

**LinkPass** – Plastic card with a monthly pass loaded on it, but has no language stating what type of pass is loaded on it.

**Senior/TAP** - Plastic card that allows card holders to purchase passes at a reduced fare. These are supplied by the CharlieCard Store.

**Benefit Month** – The month that the purchased passes will be valid for