

## UCOP Pre-Tax Commuter Benefits Program

This [pre-tax commuter benefits program](#) allows eligible employees to set aside up to the limit set by IRS on a pre-tax basis for commuter transportation and parking expenses. The following are the limits for the 2020 tax year:

- \$270 per employee per month for all public transportation
- \$270 per employee per month for qualified parking

UCOP Parking & Transportation has contracted with **Edenred** Commuter Benefit Solutions, a commuter benefit management company, to administer the program through their **Commuter Check (CCD)** website at: <https://login.commuterbenefits.com/>.

Company ID for UCOP is **1259**.

### Eligibility

Only permanent and contract UCOP employees are eligible to participate in the program.

### How It Works

1. You place an order (or change/cancel current orders) on [CCD site](#) to be fulfilled on a monthly basis by the cutoff date, which is the **1st of the month for next month's transit and/or parking expenses**. Typical orders include:
  - o Monthly Direct Pay: On your behalf, CCD sends parking payment fees directly to your parking provider before the month of use, be it UCOP Parking & Transportation for [UC-managed lots](#) like Franklin Garage, or outside parking providers such as Impark for [Kaiser Center Garage](#).
  - o Clipper E-Cash: CCD loads the amount you order onto your Clipper card before the month of use and the funds can be used for any transit agencies that accept Clipper card.
  - o Clipper's BART High Value Tickets: CCD loads the value of the BART tickets to your Clipper card before the month of use and the funds can only be used for BART fare.
  - o Commuter Check Prepaid MasterCard: CCD loads the amount of your order before the month of use and the funds can be use for any parking and transit agencies that accept the MasterCard. **NOTE: You must place a separate MasterCard order for parking and transit because parking and transit funds are not interchangeable.**
  - o Commuter Check Voucher: CCD sends the vouchers to the address you specify in your order and you redeem them to pay for your qualified parking or transit expenses. **NOTE: No cash back so must order exact amount.**
2. On the 3rd of the month - two days after the cutoff date - payroll deduction transactions are made available electronically by CCD for UCPath Center to process for the upcoming B1 & B2 payrolls for bi-weekly employees and MO payroll for monthly employees. **NOTE: If B1 payroll was processed before the 3rd of the month, adjustment will be made to B2 to correctly reflect the total amount for the month.**
3. Also on the 3rd of the month CCD invoices UCOP Parking & Transportation for the cost of your order.

# UCOP PRE-TAX COMMUTER BENEFITS PROGRAM

4. UCOP Parking & Transportation pays CCD in advance for the cost of your order and in turn receives payment via payroll deductions on the upcoming B1, B2, and MO payrolls.
5. After receiving payment from UCOP Parking & Transportation, CCD processes and fulfills your order before the end of the month, such as loading the funds onto your MasterCard/Clipper card or sending parking payment checks to UCOP Parking & Transportation for your Franklin parking or to Impark for your Kaiser parking.

## CCD Monthly Schedule:

- **1st of month X (this month)** - Enrollment/order ends. This is the cutoff date for placing a new order or changing existing order for benefit month Y (next month).
- **18th - 23rd of month X** - Orders are processed and shipped/loaded. If you have a monthly direct pay parking provider, a check will be sent to your parking provider to pay for month Y. If you have a Commuter Check Card order, you will receive your card (for 1st time order) and the money will be loaded on your card on the 23rd.
- **21st - 25th of month X** - You receive your order for month Y or your parking provider receives payment for month Y. If receiving vouchers, your order will arrive in time for easy redemption for use in month Y.

See also [CCD ordering timeline](#) for the exact ordering periods for all twelve benefit months.

## UCOP Payroll Deduction Monthly Schedule:

The following schedule for parking and transit payroll deduction is dependent on the UCPATH Payroll Processing Schedule. You can access the schedule under Quicklinks after logging into your [UCPATH](#) account.

- **1st of month X (this month)** - Enrollment/order ends. This is the cutoff date for placing a new order or changing existing order for **benefit month Y (next month)**.
- **3rd of month X** - CCD sends UCPATH payroll deduction information for **benefit month Y** for all UCOP participants
- **B1 Check Date in month X** - bi-weekly deduction (half of the amount submitted by CCD)
- **B2 Check Date in month X** - bi-weekly deduction (half of the amount submitted by CCD)
- **MO Check Date in month Y** - monthly deduction (full amount submitted by CCD)

**Bi-weekly employees:** When the “Pay Confirm” deadline for B1 processing is before the 3<sup>rd</sup> of the month, we will not be able to affect the deduction on B1 paycheck and thus will make adjustment to B2 deduction as follows:

- If it is a new deduction, i.e., you do not have a current deduction, we will collect the full amount on B2 paycheck.
- If it is a cancellation of the current deduction, we will issue a refund on B2 paycheck.
- If the new deduction amount is higher than the current deduction, we will deduct an additional amount for the difference on B2 paycheck.
- If the new deduction amount is lower than the current deduction, we will issue a refund for the difference on B2 paycheck.

# UCOP PRE-TAX COMMUTER BENEFITS PROGRAM

If you have any questions about your payroll deduction, please send UCOP Parking & Transportation an email at [commuterserviceshelp@ucop.edu](mailto:commuterserviceshelp@ucop.edu). For questions regarding what products to order and how to place an order, please call CCD customer support help line at (888) 235-9223 or e-mail [CCDcustomerservice@edenredusa.com](mailto:CCDcustomerservice@edenredusa.com)

## New Participant

If you are a **permanent or contract UCOP employee**, you are eligible to participate in the program. You may begin to register and place your order at Commuter Check website.

**If you are a new employee**, your information may not be in the CCD system until a few days after your start date so please wait a few days before you sign up.

**Go to:** <https://login.commuterbenefits.com/> (May not work correctly with Safari browser)

Click on **NEW USER SIGNUP** in the **Employee Login** area. You will need the following information:

Company ID: **1259**

First Name:

Last Name:

Zip Code:

**All information must match UCOP payroll records at the time of eligibility;** this information is used to authenticate you as a user in the system. If you have any problem, please contact UCOP Parking & Transportation at [commuterserviceshelp@ucop.edu](mailto:commuterserviceshelp@ucop.edu).

### ***Important Registration Tips:***

**Username: Must consist of at least 6 characters (symbols are okay, spaces are not)**

**Password: Must consist of at least 6 characters**

Once registration is completed, you are ready to place your transit/parking order(s).

## Returning Participant

**Go to:** <https://login.commuterbenefits.com/> (May not work correctly with Safari browser)

Enter your username and password in the **Employee Login** area. Contact CCD customer service at (888) 235-9223 or [CCDcustomerservice@edenredusa.com](mailto:CCDcustomerservice@edenredusa.com) if you have problems retrieving your account.

## How to Place a Parking/Transit Order

See [Employee Quick Guide](#) for assistance with placing an order for different type of products.

For tips on which products to choose, please review the [Frequently Asked Questions](#). Additional instructions can be found in the **For Assistance** section on the last page.

# UCOP PRE-TAX COMMUTER BENEFITS PROGRAM

For ordering issues, you can contact CCD customer service in three ways:

1. live chat while online
2. phone at (888) 235-9223, Monday - Friday 8am - 8pm EST
3. e-mail at [CCDcustomerservice@edenredusa.com](mailto:CCDcustomerservice@edenredusa.com).

**Important Information about Recurring Orders and Leave of Absence:** UCPATH provides Commuter Check (CCD) daily update of employee information along with changes in payroll status. When you go on leave, CCD will temporarily suspend your account. Your recurring order still remains in your account, but if you are still on leave by the cutoff date for the next benefit month, then that month order will not be fulfilled by CCD and no payroll deduction will take place. You still can log in your CCD account; a message will be displayed on your homepage, but the place order option is removed. Rest assured that if you have a Commuter Check Card Prepaid MasterCard, your card remains active.

When you return from leave, CCD will lift the suspension and begin to fulfill any pending orders for the following month. You can then log in to edit your recurring orders and/or place new ones.

It is thus important before you go on leave to contact UCOP Parking & Transportation at [commuterserviceshelp@ucop.edu](mailto:commuterserviceshelp@ucop.edu) for advice on next steps.

# UCOP PRE-TAX COMMUTER BENEFITS PROGRAM

## How to Edit Your Order to Change the Amount or Opt-out Certain Months

From your CCD Dashboard, select not the current month, but the future month. Click on Edit and make your change(s).

Last date to place an order for your August benefits is July 01, 2018.

July Order | **August Order**

Order Total: \$120.00 [Details>](#) Delivery Address ▾

Transit

Product: Commuter Check Prepaid Mastercard® (8436)

Amount: \$120.00

Recurring: Yes

This order will be finalized on July 01, 2018

[Edit](#) | [Delete](#)

## How to Cancel an Order

From your CCD Dashboard, select not the current month, but the future month. Click on Delete.

Last date to place an order for your August benefits is July 01, 2018.

July Order | **August Order**

Order Total: \$120.00 [Details>](#) Delivery Address ▾

Transit

Product: Commuter Check Prepaid Mastercard® (6759)

Amount: \$60.00

Recurring: Yes

This order will be finalized on July 01, 2018

[Edit](#) | [Delete](#)

# UCOP PRE-TAX COMMUTER BENEFITS PROGRAM

## Cancellation Due to Leave or Separation

Should you decide to suspend or terminate your participation in this program due to leave or separation, you must (1) opt out/cancel your orders on CCD website as soon as possible **and** (2) submit a suspension/termination request to UCOP Parking & Transportation at [commuterserviceshelp@ucop.edu](mailto:commuterserviceshelp@ucop.edu). If a request is not received before or on the 1<sup>th</sup> of the month for next month cancellation, your payroll will be deducted for your transit passes and/or your parking for the following month. **No refunds will be available.**

**Parkers:** It is your responsibility to contact your parking provider to suspend or cancel parking. If you park at any of the UC-managed lots, please contact UCOP Parking & Transportation at [commuterserviceshelp@ucop.edu](mailto:commuterserviceshelp@ucop.edu).

**Clipper card users:** If you use Commuter Check Card Prepaid MasterCard as the fund source, please update your Clipper account to link to your own personal card or bank account. Your CCD account will be deactivated on your separation date while your Commuter Check Card Prepaid Mastercard remains active only until the end of the separation month. Any remaining balance on the MasterCard will be refunded to you via payroll. The refund process for separated employees is slow so please expect 2 to 3 months delay in getting the refund.

## Refund Policy For Lost/Stolen Pass

The following policy is strictly enforced by Commuter Check (CCD). Some items are physically mailed to you, other products are not. The refund policy only applies to items that are mailed to you and cannot be replaced.

Examples of products that are mailed are disposable monthly tickets, per-use or daily-limited passes, and voucher products.

Examples of products that CCD does not mail are transit Smart cards that are electronically loaded, Commuter Check Cards (they are mailed in the first month, then electronically loaded thereafter), and direct pay benefits (where Commuter Check funds the transit or parking company).

Whenever CCD mails an item, CCD system automatically sends you an e-mail letting you know that your order has been shipped from their facility in Massachusetts. This is to help you estimate exactly when you will receive your order.

**All orders should be received at least one day before the 1<sup>st</sup> of the benefit month. If you did not receive your order by the 1<sup>st</sup> of the month, call the Commuter Check customer service line at 888-235-9223 or e-mail CCD customer service at [CCDcustomerservice@edenredusa.com](mailto:CCDcustomerservice@edenredusa.com).**

The IRS does not allow the program to refund you for your order directly if it was not received. Instead, the IRS allows them to reimburse you for a replacement. In that sense, it is more like a replacement-reimbursement policy. **The refund policy is limited to one refund per calendar year.**

## UCOP PRE-TAX COMMUTER BENEFITS PROGRAM

In order to receive a refund, you must:

- Complete the Refund Claim Form
- Save your receipts as proof of purchase when you purchase the replacement passes
- Fax your completed form and receipt(s) to the number specified on the Refund Claim Form
- Submit your claim no later than the 10<sup>th</sup> of the month. **Refund requests submitted after the 10<sup>th</sup> will not be eligible for a refund.**

The refund policy only applies to items that were sent and did not arrive. You will not be eligible for a refund under the following circumstances:

- If you lose your pass after receiving it.
- If your pass was returned to us because your address was undeliverable. If this happens, your returned order will be credited to your account to pay for a future order. We will only resend the pass if it cannot be credited by the transit authority (such as with a monthly/time-limited pass)

**Orders from Commuter Check are sent in a very plain-looking, non-descript envelope.** This is to prevent any unwanted third-parties from knowing what is inside the mailing. However, it is important to monitor your mail closely around the time that you expect your order to arrive to avoid overlooking the envelope.

# UCOP PRE-TAX COMMUTER BENEFITS PROGRAM

## For Assistance

Enrollment/Sign-up Issues	Contact UCOP P&T at <a href="mailto:commuterserviceshelp@ucop.edu">commuterserviceshelp@ucop.edu</a>
Ordering Issues	<ul style="list-style-type: none"> <li>• See <a href="#">Employee Quick Guide</a> for product overview &amp; ordering instructions.</li> <li>• <a href="#">Frequently Asked Questions</a></li> <li>• After login, click on Help for more information about the ordering process and the transit agencies in your area.</li> <li>• Initiate a Live Chat session with CCD customer support.</li> <li>• Contact CCD customer support at (888) 235-9223 or <a href="mailto:CCDcustomerservice@edenredusa.com">CCDcustomerservice@edenredusa.com</a></li> </ul>
Forgot password?	While at the log-in screen, click on <b>Forgot password?</b> Still having problem, please call CCD customer support help line at (888) 235-9223 or e-mail <a href="mailto:CCDcustomerservice@edenredusa.com">CCDcustomerservice@edenredusa.com</a>
BART	CCD only offers BART high value discount ticket through Clipper. See information about Clipper and how to fund your Clipper account below.
Clipper	<ul style="list-style-type: none"> <li>• Visit <a href="#">Clipper website</a> for more information.</li> <li>• Contact Clipper customer service at (877) 878-8883 and press 0 to talk to a customer service representative.</li> <li>• <a href="#">Product options to fund your Clipper card account.</a></li> </ul>
BART Parking	<ul style="list-style-type: none"> <li>• Visit <a href="#">BART website</a> for more information.</li> <li>• <a href="#">Instructions on how to pay for BART parking using Commuter Check Card Prepaid Mastercard.</a></li> </ul>
UC-Managed Parking Lots	<ul style="list-style-type: none"> <li>• Visit <a href="#">UC-managed parking website</a> for more information.</li> <li>• <a href="#">Instructions on how to place a parking order on CCD website.</a></li> </ul>