

## Quick Reference Guide

### PayFlex Commuter Benefits Online Solution

#### Getting started

- Go to [payflex.com](https://payflex.com).\*
- Click **Sign In**, located at the top right corner.
- If you're a new user, click **Create Your Profile** and complete the required fields.

#### Your Commuter Benefits Dashboard

- From the PayFlex member website, go to **Online Commuter** on the dashboard.
- Click **Manage my commuter account**.

This will take you to your Commuter Benefits Dashboard.

Here you can:

- Place an order
- View your monthly ordering deadline
- View your current orders and any recurring orders
- Edit or delete any current orders
- Calculate your potential savings

#### How to place a transit order (if offered by employer)

- From your Commuter Benefits Dashboard, click **Place an Order**. Then select **Train, Bus, Ferry or Vanpool**.
- Enter your home and work ZIP codes and click **Next**.
- Choose your transit option and click **Select**.

Enter your order details. If you would like to place the same order for multiple months, select **Yes** for "Automatically place this order each month?" If not, select **No**.

If you want to opt out of any month, select **Yes** for "Are there any months you do not need this order?" If not, select **No**. Then click **Next**.

#### How to place a transit order (continued)

You can add other products or simply click **Proceed to Checkout**. Confirm your delivery information and click **Next**. Review your order and the terms of service. Check the box and click **Place Order**. Success! You've completed your order.

#### How to place a parking order (if offered by employer)

- From the Commuter Benefits Dashboard, click **Place an Order**. Select **Park**.
- Enter your home and work ZIP codes.
- Select how you generally pay for parking.
- Choose your parking product and click **Select**.

Enter your order details. If you would like to place the same order for multiple months, select **Yes** for "Automatically place this order each month?" If not, select **No**.

If you want to opt out of any month, select **Yes** for "Are there any months you do not need this order?" If not, select **No**. Then click **Next**.

You can add other products or simply click **Proceed to Checkout**. Confirm your delivery information and click **Next**. Review your order and the terms of service. Check the box and click **Place Order**. Success! You've completed your order.

#### How to edit or cancel an active order

You have two options:

- Click **Edit** on the product you want to change. Your order details will display. Make any edits and click **Save Changes**.
- OR, click **Delete** on the product you want to remove/cancel. You'll see a message asking if you want to delete the order. To confirm, click **Delete**.

\*If you're an Aetna member, log in at [Aetna.com](https://aetna.com). Click **Access Your Account** to get to your PayFlex member website.

## How to sign up for the parking Cash Reimbursement option

If you pay for a parking expense with a personal credit card, cash or check, you can get reimbursed. First, enroll in the Cash Reimbursement option online.

- From the Commuter Benefits Dashboard, click **Place an Order**. Select **Park**.
- Enter your home and work ZIP codes and click **Next**.
- Select how you generally pay for parking: “Cash” or “Parking meter”.
- Next to “Enroll in Cash Reimbursement”, click **Select**.

Enter your order details. If you would like to place the same order for multiple months, select **Yes** for “Automatically place this order each month?” If not, select **No**.

If you want to opt out of any month, select **Yes** for “Are there any months you do not need this order?” If not, select **No**. Review the terms of service. Check the box and click **Next**.

You can add other products or simply click **Proceed to Checkout**. Confirm your delivery information and click **Next**. Review your order and the terms of service. Check the box and click **Place Order**.

## Cash Reimbursement option

Once you park at or near work and pay for that parking expense, you can submit a claim for reimbursement.

- Log in to the PayFlex member website and click **File a claim**. If you have a statement/detailed receipt from your parking provider, be sure to upload, fax or mail those documents.
- OR, you can complete a paper claim form and fax or mail it with your documents.

## Things to keep in mind

The Internal Revenue Service (IRS) sets the monthly pretax parking and transit limits. View the current limits on the PayFlex member website.

Unused funds roll over to the next month.

If you spend more than the monthly limit, that additional amount must be paid out of your pocket (on an after-tax basis). You'll have to enter your payment method online.

PayFlex will replace up to one non-delivered pass per plan year. We are not responsible for:

- Expired or lost passes
- Passes that you receive late because of delays with local transportation authorities
- Passes that you do not receive due to an invalid or incorrect address

The voucher checks are only valid for one year.

# Questions?

Log in to your PayFlex member website and click **Contact Us** under **Help & Support**. Here you can also **Live Chat** with us.

This material is for informational and educational purposes only. It does not contain legal or tax advice. You should contact your legal counsel or your tax advisor if you have any questions or if you need additional information. Information is believed to be accurate as of the production date; however, it is subject to change. PayFlex cannot and shall not provide any payment or service in violation of any United States (US) economic or trade sanctions. For more information about PayFlex, go to **PayFlex.com**.

Commuter Check® is a registered trademark of Commuter Check Services Corporation.