

**eflex**

A TASC Division

www.eflexgroup.com

# Welcome

## Transportation & Parking

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# WELCOME.

**We're delighted to have you as a customer!** Your employer has selected eflex to administer your Mass Transit and Parking benefit plan, and we're on a mission to make your life a whole lot easier.

Founded in 2000, we've earned our stripes by placing our customers at the heart of everything we do. We service each customer how they prefer to be serviced, with a personalized touch enabled by the highest standards in technology and innovations. In fact, we post our service metrics daily on our website at [www.eflexgroup.com](http://www.eflexgroup.com).

## ABOUT

The eflex Transit account is perfect for people who use work-related mass transit and/or pay for parking; **it can save them up to 30% on commuting expenses.**

With this account, you set aside portion of your paycheck to be used for qualified transit and parking expenses on a pre-tax basis. Because money is withdrawn from your paycheck before taxes, your monthly taxable income is lower.

## MASS TRANSPORTATION

Mass transportation can be a **public system or private enterprise** provided by a company or individual that's in the business of transporting people in a "commuter highway vehicle." Such a vehicle must have a seating capacity for six or more adults (not including the driver) and at least 80% of the vehicles' mileage must be from transporting employees to and from work, and must also include three passengers.

Commuter highway vehicles may be owned or leased by an employer or third-party provider for transportation purposes. **Employees may also own and operate commuter highway vehicles.**

## PLAN BENEFITS

- ✓ Pay for commuting expenses with pre-tax dollars and receive a federal tax savings up to 30%.
- ✓ With the ability to spend pre-tax funds, overall take-home pay increases.
- ✓ More choices in selecting benefits that fit individual needs
- ✓ Manage account online via our secure employee portal and free mobile app
- ✓ Online enrollment and claims payment
- ✓ Allows adjustments on monthly basis to accommodate life events and any spending changes.

## CONTRIBUTIONS

You may contribute up to the monthly maximum noted on page three. In some cases, the monthly maximum may not be enough to cover the transit expenses. So to ensure coverage, you may add post-tax dollars to your transit account.

### QUALIFIED PARKING EXPENSES - *Monthly Maximum Contributions: \$255*

Expense Description	Eligibility
Parking at a location from which employee commutes (park and ride, train station, etc.)	Yes
Parking meters (at or near work)	Yes
Parking in a facility (at or near work)	Yes
Parking passes	Yes

### QUALIFIED TRANSIT EXPENSES - *Monthly Maximum Contributions: \$255*

Expense Description	Eligibility
Bus	Yes
Car maintenance	No
Commercial vanpool	Yes
Ferry	Yes
Gasoline	No
Mileage	No
Streetcar	Yes
Subway	Yes
Taxis	No
Tolls	No
Train	Yes
Transit passes (fare cards, tokens, vouchers, etc.)	Yes

## SUBMITTING CLAIMS

### PARKING

If you don't use the debit card, you can submit a claim form for reimbursement by email, FAX, or mail along with any available documentation.

We can also setup parking claims on a recurring basis. This feature allows you to receive continual reimbursements throughout the year after submitting a single claim.

Find a claim form at [www.eflexgroup.com/forms](http://www.eflexgroup.com/forms).

Set up a recurring claim by following the instructions on the claim form—you'll receive parking reimbursements each time there's a payroll deduction.

### TRANSPORTATION

Pay for transit expenses using the eflex debit card. The amount available in your transit account is the balance on your debit card. You may use the card up to the available balance, but never over—you'll have to pay the difference.

Simply swipe the card at the point-of-purchase like any other debit card, and funds are automatically withdrawn from their Transit account in real-time.

The debit card can only be used at approved providers. When the expiration nears, a new card will be automatically sent to you.

**As of 01/01/2016, cash reimbursement is not allowed for Transit benefits. You must use the debit card for eligible Transit purchases.**

## REIMBURSEMENT PAYMENTS - for PARKING ONLY

You can request payment through our website, email, FAX, postal mail, or our eflex Benefits mobile app for Parking expenses. You may also choose one of the following reimbursement options.

1. **Debit Card:** Funds are instantly withdrawn from the Parking/Transit plan and paid to the provider.
2. **Direct Deposit:** Directly deposit money into your checking or savings account.
3. **Recurring Payment:** For parking expenses only.
4. **Check:** Have a check sent directly to you or your provider.

### ONLINE EMPLOYEE PORTAL

You can access important account information any time, day or night, through our online employee portal at [eflexgroup.com](http://eflexgroup.com). Enjoy 24/7 access to your account balance, claims history, eligible, expenses, enroll in direct deposit, and even submit claims.

### FREE MOBILE APP

View your account status and balance on the go with the eflex Benefits mobile app for Apple and Android devices. You can even submit claims by simply taking a picture of your receipt—the receipt will automatically upload to eflex with a direct link to that particular claim. Visit your app store and search "eflex" to download.

# PERSONAL PLANNING WORKSHEET

Use this worksheet to estimate the amount of eligible transit expenses for the upcoming plan year. Your estimated expenses will act as guide to determine how much to contribute into your Transit plan. When you're finished, simply transfer the total from this worksheet to the Transit enrollment form.

**NOTE: For compliance purposes, qualified expenses must be separated into two accounts: Mass Transit and Parking. Funds cannot be transferred between accounts. For example, funds set aside for Parking can't be used for Mass Transit or vice versa.**

## Transportation Expenses

Transit passes (fare cards, tokens, vouchers, etc.)	\$
Commercial Vanpool	\$
Ferry	\$
Bus	\$
Streetcar	\$
Train	\$
	<b>Total:</b>

## Parking Expenses

Parking at or near place of work	\$
Parking at commuting location	\$
Parking meters at or near place of work	\$
Parking passes	\$
	<b>Total:</b>

Are you uncertain about whether an expense is eligible?  
**Visit [www.eflexgroup.com](http://www.eflexgroup.com) or call us at 877.933.3539.**

# TRANSIT ENROLLMENT FORM

## EMPLOYEE INFORMATION *(please print clearly)*

Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Employer Name \_\_\_\_\_ Dept/Location \_\_\_\_\_

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_

Employee Home Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Home Phone # \_\_\_\_\_ Email \_\_\_\_\_

Employment Date \_\_\_\_\_ Plan Effective Date \_\_\_\_\_

## EMPLOYER INFORMATION *(employer to complete information below)*

Date of 1st Payroll Deduction \_\_\_\_\_  
 Month Day Year

2-Month Plan Year

Employee Plan Effective Date \_\_\_\_\_  
 Month Day Year

Short Plan Year

## EMPLOYEE ELECTIONS *(employee to complete the information below; you may not contribute more than the IRS maximums shown below.)*

	Annual Election		# of Payroll Deductions		\$ Per Pay Check
<b>A. Parking</b> (\$255 monthly max.)	\$ _____	÷	_____	=	\$ _____
<b>B. Parking Post-tax</b>	\$ _____	÷	_____	=	\$ _____
<b>C. Mass Transit Pre-tax</b> (\$255 monthly max.)	\$ _____	÷	_____	=	_____
<b>D. Mass Transit Post-tax</b>	\$ _____	÷	_____	=	\$ _____
<b>E. Admin Fee (if any)</b>	\$ _____	÷	_____	=	\$ _____
<b>TOTALS</b>	\$ _____				\$ _____

**NO, I don't want to enroll.**

**Yes, I want to enroll.**

Signature \_\_\_\_\_ Date \_\_\_\_\_