



*Getting to work can be a lot less taxing.*

## ***Five easy steps for getting started with TransitChek***

You can be up and running with TransitChek in about a month!

### ***1. Design a program that fits your needs***

- > Use the TransitChek Employee Survey to get an idea of how many people are interested in participating and at what level. Also, ask what transit provider they commute on.
- > Choose from the low-cost, original TransitChek program or our premium benefits administration service, TransitChek Select.
- > Select a Program Option: employee-paid, employer-paid, or share-the-fare.
- > Consider how often you will order and distribute TransitCheks. To save on shipping and handling costs, order quarterly or semi-annually. Even if you order quarterly, you can distribute vouchers to employees on a monthly basis. However, please note that if you decide to upload the TransitChek benefit onto PATCO riders' FREEDOM Cards, that benefit will be uploaded in full at the time of your order. If you wish to have uploads occur monthly, then you must place a monthly order for FREEDOM loads (you can continue to order vouchers quarterly).

### ***2. Coordinate with your human resources, payroll, and accounting departments.***

- > If you are offering TransitChek through employee-paid payroll deductions, talk with your payroll department or payroll provider and let them know you want to coordinate a pre-tax payroll deduction for TransitChek (i.e. transportation fringe benefit) under Section 132(f) of the U.S. Internal Revenue Code. Let them know when you want deductions to begin, and how often they should occur. Assess the impact of any salary deduction on other benefits.
- > Human resources can determine employee eligibility and should be aware of any relevant equity issues.
- > Remember, we offer \$15, \$20, \$21, \$30, \$35, \$60, and \$65 denominations which can be combined to reach any level of participation, up to \$230 per month per employee.
- > You are welcome to streamline your program by offering a fixed benefit amount or providing only a selection of voucher denominations. For example, you may offer employees two \$35 vouchers each month.



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**3. Set policies and create an optional benefit plan document.**

- > Employers decide how the TransitChek program will be administered.
- > Unlike many federally-sanctioned benefits, you are not required to prepare a benefit plan when you offer TransitChek. However, it is a good idea to let employees know how the program works.
- > Create an (optional) company policy document that lets employees know how to enroll in and leave the program, the allowable benefit amount, relevant dates, payroll deduction schedules, and how your organization will handle issues of voucher expiration or abuse.
- > For pre-tax payroll deduction, create a simple election form including the date of the election and the level of participation. Employers decide how often employees can opt in or opt out of the program, or change their deduction amount.
- > Consider asking participants to sign the Employee Certification form. This form advises employees of the IRS requirement that TransitCheks be redeemed only by the person to whom they are issued.

**4. Place order.**

- > Simply print and complete the TransitChek Order Form and the PATCO FREEDOM Card Total spreadsheet (remember to email a copy of the FREEDOM spreadsheet first).
- > Mail form with payment.
- > Your first order of vouchers will arrive in about three weeks (subsequent orders take about two weeks).

**5. Educate employees, distribute vouchers, and re-order.**

- > Clearly communicate to employees when they should expect vouchers and payroll deductions if applicable.
- > TransitChek representatives are available to conduct presentations, attend benefit fairs, and provide instructional materials.
- > Delivering TransitChek vouchers can easily be done when paychecks are distributed. (If you choose TransitChek Select, you don't even have to think about distribution!)
- > Re-order monthly, quarterly, or as-needed.
- > Re-order forms are enclosed in your initial order and are available on the front page of [www.GetTransitChek.org](http://www.GetTransitChek.org).

***For more information, visit [www.GetTransitChek.org](http://www.GetTransitChek.org) or call 215.592.1800.***