

Guidelines for Using Your Commuter Benefits

A commuter benefits plan is an employee benefit provided by an employer. Enrolling in a commuter benefits plan saves you money by allowing you to use pre-tax dollars to pay for qualified work-related transit and parking expenses.

Important: Participation is monthly rather than annual. You can [enroll](#) one month and not the next — it's your choice!

Important: Please review the following information so you are aware of the rules that apply to your commuter benefits plan.

- [Commuter Benefits Plan Regulations](#)
- [Eligible Commuter Expenses](#)
- [Your Monthly or Recurring Order](#)
- [Reimbursement Requests – Parking expenses only](#)
- [Unused Funds](#)
- [Missing or Loss Passes, Vouchers, or Smart Cards](#)

Commuter Benefits Plan Regulations

IRS [Section 132](#) rules allow you to use pre-tax funds to pay for qualified work-related commuter and parking expenses.

Eligible Commuter Expenses

Only work-related eligible expenses can be reimbursed under the commuter benefits plan. These expenses are defined by *Internal Revenue Code Section 132* and your employer's plan.

Transit Expenses

- Bus
- Subway
- Train
- Streetcar
- Ferry
- Commercial van pool and commuter highway vehicle

Parking Expenses

- Parking at or near work
- Parking at or near transportation service site
- Park and ride expenses

Important: Qualified expenses include those incurred for your transportation between your residence and worksite. Expenses for your spouse or dependents are not eligible.

Your Monthly or Recurring Order

You can easily place your order online. When your order has been completed and approved, transit or parking passes will be mailed to your home.

Simply follow these steps:

1. Log in to your CONEXIS [online account](#).
2. Find your metropolitan area and transit or parking vendor.
3. Select from the available products.

You can order your transportation passes or vouchers one month at a time, or you can schedule a recurring order. After you place your order, you will receive an email with an order reference number. This message does not confirm that your order has been approved. Either way, you will receive monthly emails to keep you up to date on your transit selections and your account balance. You may also skip months and edit recurring orders that are already in place.

No more waiting in line to purchase your own passes or vouchers — you can place your order online through your [CONEXIS account](#). When your order is complete, your passes or vouchers are mailed directly to your home. If you place your order by the 10th of the month, you should receive your passes before the end of the month.

Order and Cancellation Deadlines

Your order must be placed by the 10th of the month prior to the month you're ordering for. So if you need a bus pass for February, your deadline for ordering the pass is January 10th. The same deadline also apply to order cancellations and other changes.

Important: The deadline for placing orders is the 10th of the month prior to use. If you do not place your order before the deadline, you must pay for your pass or voucher out of your pocket and pre-tax dollars will not apply.

Cancel an Order

Log in to your [online account](#) and click the option to edit or delete current or future orders. Any changes will apply to your order for the following month.

Helpful Hints

If your transit or parking vendor is not listed on the order site, you may submit a request to add the vendor to the database. Select "If you cannot find your provider, click here," and then enter the transit authority or parking vendor information. When the vendor has been verified and added to the database, you will receive an email. Note: This process typically takes five to 10 days.

If you do not know your transit or parking vendor, check out the table of available transit passes displayed at the bottom of the order screen. If you do not recognize the pass that you typically purchase, visit the transit authority's website by clicking the link above the transit table.

Important: There are monthly maximum pre-tax limits set by the IRS. Purchase amounts more than the pre-tax limits will require you to use your post-tax dollars.

- Transit: 2015 pre-tax transit limit is \$130 per month*
- Parking: 2015 pre-tax parking limit is \$250 per month

Unused Funds

As long as you are an active participant, you may carry over unused contributions to another month. Unused amounts cannot be used to reimburse you after you have been terminated, and funds remaining in the account will be forfeited. COBRA does not apply to commuter expenses.

Missing or Lost Passes, Vouchers, or Smart Cards

Transit and parking passes and vouchers are generally considered financial instruments with a cash value, and refunds and replacement passes or cards cannot be provided if missing or lost.

If you use a smart card, a replacement may be obtained with your original balance depending on the type of smart card you use. Contact CONEXIS for a replacement smart card.

Reimbursement Requests

For transit expenses: There are no receipts to submit when you place your order through your [online account](#). Cash reimbursement is not permitted as all orders must be processed via Conexis.

Parking Reimbursement Documentation

- Cash reimbursements require supporting documentation and a completed reimbursement form.
- Claim form is available through your [online account](#).
- Receipt, unless it's not obtainable (such as metered parking). If you do not have a receipt, check the box under Supporting Documentation on the reimbursement form.

Reimbursement requests must be submitted within 180 days after you paid for parking expense. You may submit your reimbursement request in one of four ways:

1. Online through your [CONEXIS account](#) — you will need access to a scanner
2. Take photo of the receipts, upload them via Conexis Mobile app
3. Fax using the number listed on your form
4. Mail to the address on your form — send copies of your receipts and keep the originals for your records

Important: The IRS requires that the Plan Administrator must receive ALL claims for qualified expenses within 180 days after the service is provided in order for it to be considered for reimbursements. Upon separation of active employment, employees have up to 90 days to submit a claim. Unused funds not requested for reimbursement upon termination of employment are forfeited. Unused fund(s) will be rollover for the next plan year for active participants.

** A provision in the American Taxpayer Relief Act increased the monthly transit limit to the same amount as the monthly parking limit; however, the provision ended on December 31, 2013. The limits listed above have been indexed for inflation in 2014.*