



COVID-19 and your transportation benefit

Summary: As the way in which we work and how we get to and from work evolves due to COVID-19, employees may have expressed concerns regarding use of their transportation benefits. The below outlines current policies and options available for both the Ordering Model and Election Model – transportation benefit product varies by client.

- During these unprecedented times, it remains Optum Bank’s top priority to keep you informed and prepared to answer questions from your employees.
- We recognize that your employees’ transportation needs may evolve in the coming weeks and months, and they may have questions regarding the use of their transportation benefit with Optum Bank.

Ordering Model (Optum Direct/UHC)

- Your employees may have set aside funds each month, up to the 2020 limits, before income and payroll taxes. The pre-tax limits are up to \$270 each for qualified transit and parking expenses.
- For ongoing commuter-related expenses, they may have set up a recurring order that automatically generates their transit order or pays their contracted parking vendor. If their commuting needs have changed, they can adjust or discontinue their order. Follow the detailed steps below to make adjustments.
 - **Refunds and cancellations for April orders:**
 - April orders cannot be cancelled at this point.
 - In the event that a purchased transit product for April is not needed, your employees should reference [this link](#) to find out about the product return policy specific to their transit authority.
 - For May orders that have already been placed, they may edit or delete their order (up to the 10th of the month in most cases). They can make changes right from their order dashboard. Under the **Options** button, select **Edit Order** or **Delete Order**.
 - If they have a smart card or prepaid debit card, there is no need to return it. Funds can be used for future commutes even if it is not used in April.
 - **Policies for orders in upcoming months:**
 - If your employees do not plan to use their commuting order for May or other upcoming months, they may opt-out of specific month(s).
 - They should follow these steps to opt-out, if needed:
 - (If *Optum Direct client*) Sign in to optumbank.com and select **Transportation Services** to be directed to the ordering site.
 - (If *UHC client*) Sign in to myuhc.com and select **Manage Your CERA** under **Plan Balances** to be directed to **Transportation Services** on the Optum Bank site.
 - Locate your existing order for a particular month on the dashboard.
 - Under **Options** select **Edit Order**.
 - Under the question “Are there any months you do not need this order?”, select the month(s) you need to opt out.
- If your employees have the Commuter Check Prepaid Mastercard®, funds on the card do not expire and can be used at any time.
- For more information, employees should visit the [Commuter Benefits site](#).



Election Model (Optum Direct only)

- Your employees may have made purchases for their commuting needs (i.e., bus passes, train passes, smart card, parking fee) using their Optum Bank payment Mastercard®.
- If their commuting needs have changed related to the transportation products they have purchased, and they need to request a refund or cancellation, those transactions must be handled directly with the vendor or merchant that they made the purchase through.