



Business Account User Guide

Version 11
August 2016



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BASIC NAVIGATION

LOGIN

To login, go to orcacard.biz and enter your 4-digit Business Account ID (assigned by your Lead Agency) into the 'Business Account ID (Username)' field and your password. Note: your Business Account ID cannot be changed.

You can only have one password for your account. All authorized users will use the same password and have the same level of access to your account. Account login information should be distributed only to those needing access to your account for order processing or account management purposes.

RESET FORGOTTEN PASSWORD

If you forget your password, click the **Login help?** link on the login page then on the link **Forgot your password?** on the next screen. This link will take you to a re-set password screen.

To complete this task you will need your Business Account ID number and **either** (not both):

- Your business name exactly as it appears on the website
- Or your tax ID number (typically formatted as XX-XXXXXXX).

Your new password will be sent only to the email address of the Business Account Contact 1 as listed on your account.

If the system indicates that a new password has been sent and you did not receive it in your email account inbox, check your spam folder. If necessary, check with your IT staff to see if the email address contactus@orcacard.com has been filtered.

CHANGE PASSWORD

You can change the password for your Business Account by clicking on the **Update Password** link in your Welcome page. Click on Welcome in the left navigation bar to navigate to the Welcome page.

CHANGE BASIC ACCOUNT INFORMATION

If you need to review or change basic information about your agreement, such as contact names or phone numbers, click on **Account Details** in left navigation bar, once you've logged in.

There are two tabs at the top of this page:

- **Business Account information** – review company information, such as company name, tax ID and addresses. [Contact your Lead Agency](#) if any of this information needs updating.
- **Contact Information** – edit the contact information or add additional contact people (a maximum of four contacts allowed).

Make sure to click the **Save** button on the bottom of the page to save any changes you've made.

FORGOTTEN BUSINESS ACCOUNT ID

For help with a forgotten Business Account ID (four digit number): Contact your Lead Agency and provide your contact information - for example, name and address. Your Lead Agency representative will then provide your Business Account ID. Lead Agency representatives do not have access to your account password.

CARDS AND PRODUCTS ORDERING

Once a Business Account Agreement is approved by the Lead Agency, the business can initiate card and/or product orders using the Business Account website. Orders placed on accounts configured for credit card payment will be approved after the credit card transaction completes. Orders placed on accounts configured for check payment are approved by the Lead Agency upon receipt of check payment.

Cards can be ordered with or without products loaded onto them, depending on the needs of the Business Account. Once cards have been purchased and distributed, products may be ordered for those cards on an ongoing basis.

ORDER CARDS

Follow these steps to order a supply of empty cards or cards preloaded with product(s). If you need to order a replacement card for a lost, stolen, damaged or defective card that has a valid product or E-purse on it, **please see [page 23](#) for instructions.**

After logging into your account, your account's Welcome page will appear.

In the "My Orders" box a list of all current orders will be displayed, with their status noted (pending, approved, completed). If there are no orders, the list will be empty.

1. Select **Orders** from the left navigation bar.
2. Click **Get New Cards** on the Orders screen.
3. You are now at the **Create New Card Order** screen. Fill in the order details.
 - a. Select a **branch** name
 - b. Select a **group** name
 - c. Identify the **quantity** of cards to be ordered
 - d. Enter a **description of your order** (optional)
 - e. Select the required **card type**
NOTE: Only standard cards are available at this time.
 - f. Select **Card Printing Template and personalization file**
NOTE: This is a feature with an additional cost - Your Lead Agency will work with you on this option if pertinent.
 - g. Identify **passenger type** (i.e. adult, youth)
 - i. If choosing youth, enter the **youth card expiration** month and year (mm/yyyy). If you need youth cards, please check with your Lead Agency to verify eligibility criteria and expiration limitations.
 - ii. Low income cards are available in limited service areas and require pre-approval. Please check with your Lead Agency for availability and eligibility criteria.

- iii. If a cardholder in your business/institution has an ORCA Regional Reduced Fare Permit (RRFP) and you want to load business products, the card must be associated with your account first. Please refer to [page 17](#) for instructions on how to Associate a Card.
 - h. Enter any **special handling instructions** (i.e. shipping instructions) for fulfillment.
 - i. Enter any **notes** into the Notes log (notes are not viewed by fulfillment staff).
 - j. Any **card fee** will show up here.
4. Click **Next** – you will now be at the **Create a New Order-Add Products** page - If you are ordering empty cards with no products, skip to step 6. If you are ordering cards preloaded with a specific product, go to step 5.
5. On Create a New Order-Add Products page, check **Business Choice** box then select the product(s) you want to have preloaded onto the cards. Selecting a product here will apply that product to all cards in the order.
6. Click **Next** - You will now be at the **Order Summary** page. You will be given an order number, quantity of cards ordered and the total cost of the order.
7. You must now confirm the order.
8. Select **Shopping Cart** from the left navigation bar. Click the box next to your order number and then select **Confirm Order**. Or, to remove your order from the shopping cart, click the box next to your order number then select **Remove from shopping cart**.
9. At the **Confirm Current Orders** page, select **Confirm** again.
10. When status shows “**ready for payment**,” you can make your payment and your order will be processed.

NOTE: If you are paying by credit card, the order is automatically approved after you confirm and successfully process payment; it does not require Lead Agency approval.

If paying by check, once you confirm the order and remit payment, your Lead Agency must approve before it is processed and shipped. Approval will be done once payment is received. Once approved, an order cannot be changed. **See [page 10](#)** for detailed payment information prior to placing your order.

ORDER PRODUCTS ONLY

Once you have your cards, you can add value as needed. If you are buying monthly passes, you will need to place an order each month. E-purse or E-vouchers may be ordered monthly or as needed.

NOTE: No matter which order or payment process you use, cards must be tapped on an ORCA card reader within 60 days of order to complete the product load.

To order products after you already have your ORCA cards:

1. After logging into your account, on your Welcome page, click **Order Products** in the **My Orders** box or select **Orders** from the left navigation bar, then click **Order products**.

2. Check the box for when you would like the system to send you an email notification:
 - a. No Email
 - b. Order fails validation
 - c. Order is ready for payment (prepay only)
 - d. Order is approved

NOTE: This will default to the email address of the primary contact on the account. Enter the email address you would like the notification sent to, if different.

3. Enter a description. This will show on the list of orders and can be helpful in distinguishing one order from another, such as "February passes" or "Feb. e-purse".
4. You have three choices to create your order:
 - 1) Create a new order
 - 2) Copy last order
 - 3) Import an order from an internal spreadsheet. See Import a Product Order **on [page 9](#)**.

CREATE A NEW PRODUCT ORDER

1. Click **Create** and you'll be redirected to the Order Management page.
2. Select **branch** name.
3. Select **group** name, (this will load the products on all cards in the group) **OR**
4. For a single card, enter the card serial number. For multiple cards, enter the range of serial numbers. More than one range may be entered.

NOTE: You cannot select both a group and enter card serial numbers on this page.

5. Click **Next**.
6. Check **Business Choice**.
7. Select the products you want to load on card(s). Available products will be displayed. You can load a pass or money onto the E-purse. If loading a pass you must also select the pass period to load (i.e. June 2016).

NOTE: Monthly passes can be loaded for the current month from the 1st day of the previous month through the 14th of the current month. Beginning on the 15th of the month, only passes for the following month may be loaded.

To ensure the order can be processed in time, payment for monthly product orders should be made (credit card payments) or received (check payments) no later than the 25th day of the month for passes valid next month. The recommended lead time is two weeks when ordering new cards preloaded with monthly pass products, to allow for processing and shipping.

8. Click **Next** and the **Order Summary** page will display your order number, the order amount and a message to "follow the instructions in the Shopping Cart."
9. Click **Shopping Cart**.

10. To **Confirm your order** click the box next to your order number and then select **Confirm Orders**. Or, to remove your order from the shopping cart, click the box next to your order number and then select **Remove from shopping cart**.

11. At the **Confirm Current Orders** page, select **Confirm** again.

NOTE: The validation process may take up to 6 hours to complete. If making payment by credit card, please logout and return to complete your order later.

12. When status shows "**ready for payment**," you can make your credit card payment and the order will be processed.

NOTE: If you are paying by credit card, your order is automatically approved after you confirm and successfully process payment; it does not require Lead Agency approval.

If paying by check, once you confirm the order and remit payment, your Lead Agency must approve it before it is processed. Once approved by the Lead Agency, the order cannot be changed. **See [page 10](#)** for detailed payment information prior to placing your order.

Please allow 24-48 hours for the order data to reach ORCA card readers. Cards included in the order will need to be tapped at an ORCA card reader after that period, but within 60 days, to load.

UPDATE PENDING ORDERS

You may place a single product order for multiple cards that require different products. Before product orders are confirmed, they may be modified by using the **Order Management** tab.

1. Follow the instructions to **Create a New Product Order**; do not confirm the order.
2. Click **Shopping Cart** in the left navigation bar and click the underlined order number.
3. Click the **Order Management** tab near the top of the page (2nd tab).
4. This screen looks like the first screen used for order placement. You may add cards to or remove cards from the order.

To add one or more cards and products to the original order:

- Enter the card number(s) or groups you wish to place an order for. Note, you can add additional ranges if you need to by clicking Add Range.
- Click **Add Products** and add as you would for any other order.
- The order will go back to your **shopping cart**. **You may repeat this process (steps 1-4) as often as necessary to complete the order.**

To delete items or cards from an order:

For example, if you placed an order for a large group of cards, but want to remove one of those cards from the order:

- Enter the card number(s)
- Select **Remove Cards**

You may also remove a product from an order.

This will remove the selected product from ALL cards on the order.

Finishing the order

When you are done updating the order, go back to the **Shopping Cart** and **Confirm** the order. (Note: You may view complete details of the updated order by clicking the order number first.)

You can also remove entire orders from the shopping cart. Check the box next to the appropriate order and click on **Remove from shopping cart**.

CORRECTING AN ORDER VALIDATION ERROR

If your order fails to confirm following the validation process, the **Order Status** will reflect "PENDING WITH ERRORS".

To view the error message and correct the order:

- Click the underlined order number in your Shopping Cart.
- Click the **Errors** tab at the top of the Order Management page (4th tab).
- All errors on the order will be listed
- These are the most common error messages:
 - "(Product) is not available for card XXXXXXXX because no validity periods are available." This occurs when a similar product for the same month has already been ordered for the card.
 - "Products cannot be ordered for blocked card XXXXXXXX." Card is blocked and should be removed from order.
 - "The minimum E-purse value allowed is \$0 and the maximum E-purse value allowed is \$300 for card XXXXXXXX." This occurs when the amount of E-purse being added to the card's existing balance and any recent unredeemed E-purse results in an E-purse balance that exceeds the maximum limit of \$300.
- Click the **Order Management** tab at the top of the page (2nd tab) to correct the errors, e.g., remove a card with a duplicate product order, remove a blocked card, etc., then re-save the order and the total cost will be recalculated
- If all errors have been corrected, **Confirm** the order in your **Shopping Cart**.

COPY A PRODUCT ORDER

Another method of creating product orders is to **copy** the last approved or completed product order. This is particularly useful if you wish to duplicate an order to add E-purse funds to the same cards or to duplicate an e-voucher order. We do not recommend copying a pass product order as it will duplicate the pass month.

1. On your Welcome page, click **Order Products** in the **My Orders** box or select **Orders** from the left navigation bar, then click **Order products**.
2. Select **Copy**.
3. This step will take you to the **Order Summary** page where you can verify or, if necessary, cancel the new order.

4. If you wish to proceed with the order, you must confirm and pay for it. Click **Shopping Cart** from the left navigation bar, select the pending order and click **Confirm Orders** to confirm.

NOTE: If you are paying by credit card, your order is automatically approved after you confirm and successfully process payment; it does not require Lead Agency approval.

If paying by check, once you confirm the order and remit payment, your Lead Agency must approve it before it is processed. Once approved by the Lead Agency, the order cannot be changed. **See [page 10](#)** for detailed payment information prior to placing your order.

IMPORT PRODUCT ORDER

An order that was previously exported and modified may subsequently be imported. This process duplicates a previous order in the future (the same products, for the same cards).

NOTE: You must first have a completed product order on your account in order to use the export function. Once an order is completed (paid for), you may export it in your preferred format and use it for developing your next month's order. You will need an .XML or .CSV editor to make changes to the file.

1. Review your file and update the exported .CSV or XML file format **before** importing. Verify the card numbers (deleting replaced or blocked cards and adding new cards appropriately, etc.) and products as well as the pass month, if you are ordering monthly passes, before importing. See additional information and sample file formats in [Appendix B](#).
2. On your Welcome page, click **Order Products** in the **My Orders** box or select **Orders** from the left navigation bar, then click **Order Products**.
3. On the **Order Products** page, select **Browse...** and select the **exported product** order file from your saved files.
4. After selecting the file, click **Import**. This step will take you to the **Order Summary** page where you can verify or, if necessary, cancel the new order.
5. To proceed with the order, you must confirm and pay for it. Click **Shopping Cart** from the left navigation bar, select the pending order and click **Confirm Orders** to confirm.

EXPORT PRODUCT ORDER

If you wish to duplicate an order in the future (the same products, for the same cards) you can easily export the order to create a file for import.

To export and save Pending, Confirmed, Approved or Completed orders for later:

1. Select the order that you wish to export:
 - a. Select **Pending** orders from the Shopping Cart
 - b. Select **Confirmed, Approved or Completed** orders from the Orders page
 - c. Click the underlined order number.

2. Selecting the order takes you to the Order Summary page. From there, select a file type from the drop down list next to the **Export Order** button. The file can be saved as either .XML or .CSV. See sample file formats in [Appendix B](#).
3. Select **Export Order** then save the file on your computer.

NOTE: See [Import a Product Order](#) on page 9 for information on changing an Exported Order, before re-importing.

PAY FOR YOUR ORDER

Paying for your order may differ depending upon the type of account you have.

BUSINESS CHOICE ORDERS – MAKING PAYMENT

All orders for Business Choice agreements require prepayment. There are two primary forms of payment for Business Choice accounts, paying by credit card (Visa or MasterCard accepted only) or by company check. You select your preferred payment method at the time you sign up for your business account. To change the form of payment please [contact your Lead Agency](#).

If paying by credit or debit card (Visa or MasterCard only), you will process your payment after your order has been successfully confirmed via the website. Debit cards will be treated as credit cards – no PIN number will be entered.

1. Go to your **Shopping Cart**. Select the confirmed order (order status will reflect “Ready for payment”) and click **Process Payment**.
2. A credit card payment screen will appear – complete all requested information. The name on credit card and billing address must match what the issuing bank has on file.
3. Click **Make Payment** (**click one time only**).
4. Credit card authorization receipt will display if the transaction is successful. Print if you need a copy. The system will not retain this document for future printing.

Once payment is successful, your order will be approved. Each time you place an order you’ll need to enter the card information. The ORCA system does not retain credit card information after an order is processed. If at a later time, you wish to use another form of payment, [contact your Lead Agency](#).

APPROVING A CHECK OR MONEY ORDER PAYMENT

If you designate payment by check or money order, print the final order summary, or print your Shopping Cart page before confirming the order(s), and mail the printed information with a check or money order to the payment address designated by your Lead Agency. Once your order summary and payment are received, your order will be approved. Your check payment must be received by your Lead Agency no later than the 25th of the month (for February, we recommend the 23rd) to ensure products are available at card readers by the first day of the pass month.

After card orders are approved, you can expect to receive them in 7-10 business days. Product orders may take up to 48 hours to load.

PASSPORT ACCOUNTS

Your Lead Agency determines payment requirements for Passport Agreements. Typically, once your agreement is approved, an invoice will be generated according to the terms of your agreement and mailed for payment. Timely payment is required to maintain an active agreement.

AUTOLOAD

Autoload is not available on the Business Accounts website and any ORCA card associated with a Business Account is not eligible for Autoload on the Cardholder website except to set e-voucher settings. See [Appendix C](#) for information on e-voucher settings. The Business Account representative should provide this information to each individual as the card is issued.

CARD MANAGEMENT

Card management functions allow you to organize cards for easier product ordering and reporting, to replace lost cards and block and unblock cards as needed.

Branches are the first level of grouping cards. **We recommend you use the default branch and group created for you in the system unless you have a strong business need to create a more complex structure. Your account must have at least one branch and one group. Most business accounts use a single branch for all of their cards.**

The second level of grouping is to organize cards into smaller Card groups. Possible uses for Card groups include:

- Groups based on product type (when the same product is needed for multiple cards), which can simplify product ordering.
- A “blocked” or “inactive” group to move blocked cards into so you can keep them separate from your active cards.

A card can only be in one branch and one group at a time, though you can move cards between branches and groups as needed. Think through how best to use the branch and group structure before you set them up may simplify ongoing administrative tasks associated with your account.

Please note that some specific actions are needed to manage branches and groups. For example, tapping a card on an ORCA card reader within 60 days will be required to complete a card group update. See [Appendix A](#) for more details on actionlists.

BRANCHES – USED BY VERY FEW COMPANIES

Click **Branches** on the left navigation bar to create a branch, update a branch and remove a branch.

CREATE BRANCH

1. Click **Branches** in the left navigation bar.
2. Click **Create branch** on the Branches page.

3. Enter the name and address of the new branch (the default address is the existing Delivery Address on your account). You can also enter any special instructions that pertain to that branch, such as delivery instructions (e.g., please call xxxx when delivery is shipped).
4. Click **Create branch** at the bottom of the page when you are finished.

The screen will refresh with a green **"Success"** message indicating the branch was added.

Use the Back button or the left navigation bar to move to a different page.

Wait 24 to 48 hours **BEFORE ordering** cards for or **moving** cards to any newly created branch. If you move cards prior to this time, any products on the cards at the time you move them will be unavailable until the move is completed.

NOTE: After moving cards to a Branch, you must wait another 24 to 48 hours for this new actionlist to download to all devices. After that time, the cards must be tapped at an ORCA card reader within 60 days for them to become associated with this Branch. (Tapping is not necessary when you order new cards for the Branch.) Once the cards have been tapped, you may order products for those cards. Any products on the cards at the time you move them should remain unaffected. See [Appendix A](#) for more details on actionlists.

UPDATE BRANCH

1. Click **Branches** in the left navigation bar.
2. Select the branch you want to update by **checking the box** next to that branch on the Branches screen.
3. Click **Update branch**.
4. Make any necessary changes.
5. Click **Update branch** at the bottom of the screen when you are finished.

The screen will refresh with a green **"Success"** message indicating the branch was updated. Use the Back button or the left navigation bar to move to a different page. There is no waiting period or tapping requirement to update a branch.

REMOVE BRANCH

You cannot delete a branch with cards still assigned to it. If you try to remove a branch that still has cards assigned to it, you will receive an error message. However, moving cards to another branch may not result in removal of the branch IF those cards are not tapped before you remove the branch. See **NOTE** under **CREATE BRANCH** about moving cards between branches.

Make sure that all cards assigned to a branch that you wish to remove have been moved to another branch before completing the following steps and that all cards have been tapped.

After all cards are moved out of the branch you are trying to remove, you can remove the branch using the instructions provided below.

1. Click **Branches** in the left navigation bar.
2. **Check the box** next to the branch to be removed.
3. Click **Remove branch**. You will be taken to a confirmation page, where branches designated for removal will be listed. Review this page carefully.
4. Click **Confirm** to delete designated branch. After you click confirm, the branch will be permanently deleted.

The screen will refresh with a green **“Success”** message indicating the branch has been removed and listing the remaining branches. Use the left navigation bar to move to a different page.

GROUPS

Card groups can be used to simplify product ordering or card management functions, such as blocking cards. A default group is created when a new account is activated. All groups must be assigned to a branch. Group names can be reused in different branches, but a card can only be in one group and one branch at a time.

This section covers creating, renaming and removing groups, blocking/unblocking, importing/exporting and moving cards between groups.

Note: Creating multiple groups is not recommended for Passport accounts. Contact your Lead Agent for any questions.

CREATE GROUPS

1. Click **Groups** in the left navigation bar.
2. Click **Create group**.
3. Select the correct **Branch** from the drop down menu.
4. Enter a **Group Name** and description. The group name must be alphanumeric. The field will not accept special characters.
5. Click **Create group**. The screen will refresh with a green **“Success”** message indicating the group was added.

Use the Back button or the left navigation bar to move to a different page.

Wait 24 to 48 hours BEFORE ordering cards or moving cards to any newly created group.

If you move cards prior to this time, any products on the cards at the time you move them will be temporarily unavailable.

NOTE: After moving cards to a Group, you must wait another 24 to 48 hours for this new actionlist (see [Appendix A](#) for more details) to download to all devices. After that time, the cards must be tapped at an ORCA card reader within 60 days for them to become associated with this Group. (Tapping is not necessary when you order new cards for the Group.) Once the cards have been

tapped, you may order products for those cards. Any products on the cards at the time you move them should remain unaffected.

If the card is not tapped after moving to the new Group, the card will not be in the group EVEN IF it appears to be on the website. And any product adds you do by Group will not load product to that card.

REMOVE GROUPS

You cannot delete a card group with cards still assigned to it. To remove a group from your account you must first move the cards in that group to another group. Wait 24 to 48 hours. Tap all cards that were moved. After all cards are tapped, the now-empty group can be deleted.

See **NOTE** under **CREATE GROUP** above moving cards between groups.

1. Click **Groups** in the left navigation bar.
2. **Check the box** next to the group to be removed.
3. Click **Remove group**. You will be taken to a confirmation page, where groups designated for removal will be listed. Review this page carefully.
4. Click **Confirm** to delete designated groups. After you click confirm, the group will be permanently deleted.

The screen will refresh with a green **"Success"** message indicating the group was removed. Use the left navigation bar to move to a different page.

RENAME GROUPS

1. Click **Groups** in the left navigation bar.
2. **Check the box** next to the group to be renamed.
3. Click **Rename Group** near the bottom of the page.
4. Type the new group name and description. The group name must be alphanumeric. The field will not accept special characters.
5. Click **Update**.

The screen will refresh with a green **"Success"** message indicating the group was renamed. Use the left navigation bar to move to a different page. There is no waiting period or tapping requirement to rename a group.

BLOCK CARD GROUPS

A business can block entire groups of cards. For example, when employees leave the company, the business may move these cards to a group for former employees and block that entire group of cards. Blocking a group means that products purchased by the business can't be used by the cardholder. Blocking and unblocking generates an actionlist. See [Appendix A](#) for details on the actionlist process.

1. Select **Groups** from the left navigation bar.
2. Check the box next to the group to be blocked.
3. Click **Block group**.
4. Select a reason for blocking the group using the drop down menu.

NOTE: The recommended blocking reason is Other. Cards blocked with a reason of Permanent cannot be unblocked.

5. Click **Confirm**.

UNBLOCK CARD GROUPS

If the group was blocked temporarily, it can be unblocked using the reverse function on the website.

NOTE: The recommended blocking reason is Other. Cards blocked with a reason of Permanent cannot be unblocked.

1. Select **Groups** from the left navigation bar.
2. **Check the box** next to the group to be unblocked.
3. Click **Unblock group**.
4. Click **Confirm**.

NOTE: Card must be tapped at a card reader after 24-48 hours and within 60 days to complete the action.

EXPORT A CARD GROUP

1. Select **Groups** from the left navigation bar.
2. **Check the box** next to the group to be exported.
3. Click **Export group**.
4. A pop-up will ask if you want to Open or Save the file.
5. Click **Save** to save the file on your computer.

IMPORT A CARD GROUP

If you are moving large numbers of cards between groups, regularly blocking or unblocking batches of cards or assigning cards to groups from an internal system for tracking benefits, you may want to use the import/export function.

1. Select **Groups** from the left navigation bar.

2. Click **Import Group** and the Upload Card Group File page will be displayed.
3. Select the appropriate card group by **clicking the checkbox** next to the group, where the card group file will be uploaded. Now wait until group appears in the list of available groups.
4. Click **Choose File** and locate the .XML file to be imported. Make any changes needed before saving the file and renaming it.
5. Provide a file name.
6. Click **Upload File**.

MOVE CARDS BETWEEN GROUPS

Cards can be moved between Groups, either within the same branch or within other branches on the same business account. A single card may be moved from the Card Account Details page for a specified card number or using Groups under Manage ORCA on the left navigation menu. Moving cards generates an actionlist. See [Appendix A](#) for details on the actionlist process.

NOTE: When setting up a new card Group, you must wait 48 hours for the actionlist process to occur BEFORE moving cards to the new Group. The card will become temporarily disabled if it is moved to the new Group before the 48 hour actionlist process.

NOTE: Cards moved to a Group must be tapped at a card reader after 24-48 hours, but within 60 days, to complete the action. If they are not tapped, the move will not complete and any product ordered for that Group will not occur for any cards that are not tapped.

Move Card from Card Account Details Page:

1. Select **Cards** from the left navigation bar
2. **Enter** the Card Serial Number in the *Search by card serial number* box.
3. Click on **View**
4. Click on the Card Serial Number
5. Click **Move Card** on the Card Account Details screen.

Now the **Groups – move cards** page will be displayed. Use drop down list to identify the **destination Branch and Group** to which the cards should be assigned.

6. **Check the box** next to the card(s) to move, or use the **Select all cards in the group** checkbox. (Note The **Save current selection** button may be used if there are multiple pages of cards in the Group. Clicking the button will save the selection of card serial numbers that have been checked on the page and allow you to move to the next page to select other card serial numbers.)
7. Click **Move**. A Groups – move cards confirmation page will be displayed.
8. Click **Move** to complete the reassignment.

NOTE: Blocked cards cannot be moved from the Card Account Details page. To move a blocked card from one group to another, please see below instructions to Move Card from Groups Page.

Move Card from Groups Page:

1. Select **Groups** from the left navigation bar
2. Check the box next to group where the cards care currently located
3. Click **Move card between groups**

Now the **Groups – move cards** page will be displayed. Use drop-down list to identify the destination Branch and Group where the cards are to be moved.

4. **Check the box** next to the card(s) to move, or use the **Select all cards in the group** checkbox. (Note The **Save current selection** button may be used if there are multiple pages of cards in the Group. Clicking the button will save the selection of card serial numbers that have been checked on the page and allow you to move to the next page to select other card serial numbers.)
5. Click **Move**. A Groups – move cards confirmation page will be displayed.
6. Click Move to complete the move.

ASSOCIATE A CARD

You can add a personal card to your Business Account using the Associate a card function.

1. Select **Groups** from the left navigation bar.
2. Select the Branch and Group in which you want to add the card.
3. Click **Associate a Card** button and you'll be taken to the **Add Card to Group** screen.
4. Enter the **card serial number** (eight digits, located in the lower left corner of the card) and the **card verification number** (three digits, located in the lower right corner of the card). You must have both sets of numbers to associate a card to your Business Account.
5. Click **Add Card** to complete the action.

NOTE: Tap the card at an ORCA card reader 24-48 hours after you associate the card to complete the transaction. 24-48 hours after you tap the card, it will appear in your account and will then be ready for you to add product.

RE-ASSOCIATE A CARD

You can add a card you had previously disassociated from your Business Account. A card can only be re-associated to the original Business Account where it was issued. You cannot re-associate a card originally issued to another Business Account.

The card must be re-associated to the last group it was in.

1. Select **Groups** from the left navigation bar.

2. Select the branch and group in which you want to add the card.
3. Click **re-associate card(s)** and you'll be taken to the **Re-associate Card(s)** screen.
4. Enter the **card serial number** (eight digits, located in the lower left corner of the card) or a range of **card serial** numbers.
5. Click **Re-associate** to complete the action.

DISASSOCIATE A CARD

Though not recommended, business accounts may disassociate cards to allow cardholders to keep cards for their personal use. Cards may be disassociated from a Business Account at the discretion of that business.

When choosing to disassociate a card, it is the responsibility of the business account to:

- Collect any value belonging to the business from the cardholder.
- Remove the card from any pending or confirmed orders.

Once disassociated, the card will no longer be visible on the Business Account website. Even if a card (or group of cards) is not visible on the Business Account website, the card numbers may continue to appear on reports generated for the account. The card must be tapped within 60 days after processing to complete disassociation. E-purse will continue to function.

NOTE: Disassociation is not recommended for Passport accounts. Contact your Lead Agent with any questions.

Card disassociation will result in the following:

- Passport and any monthly passes purchased by the Business Account will no longer function. However, Passport will continue to display on the cardholder details page (for cardholders who sign up for a cardholder account and register their card to the account), as will PugetPass through the end of the valid month.
- E-purse will continue to function.
- Any e-voucher set up as automatic will redeem (load to the card) even after disassociation.
- Any e-voucher set up as remote on the card will not redeem (load to the card) if not done before disassociation.
- A cardholder can view what is on the card by registering their card and creating a My ORCA login at orcacard.com. They will see the continued display of Passport and PugetPass as noted above. They will also see product(s) they themselves load on the card and their own transaction history.
- If a card was registered by an individual prior to disassociation, that registration will continue to be in effect.
- A cardholder can register the card to themselves at any time, before or after disassociation (and before or after a Business Account termination).
- Once a card is disassociated, if it is not registered by the cardholder and is lost or damaged, it will not be eligible for replacement.

To disassociate a single card (refer to [page 18](#) for the effects of disassociating cards):

1. Log in to the **Business Account** website.
2. Select **Cards** from the left navigation bar, enter the serial number of the card and select View. Click on the Card Serial Number.
3. On the Card Account Details screen click **Disassociate Card**.
4. A "Confirm the disassociation of the following card" confirmation page will display. Click **Confirm**. A success message will indicate this has been completed.
5. Tap card at an ORCA card reader after 24-48 hours, but within 60 days, to complete disassociation.

To disassociate a range of cards (refer to [page 18](#) for the effects of disassociating cards):

1. Log in to the **Business Account**.
2. Select **Cards** from the left navigation bar, but do not enter any card information.
3. Click **Disassociate Card(s)**.
4. On the next screen, enter a consecutive range of cards in the **From** and **To** boxes. You can enter multiple ranges. Do not select from the **Groups** drop-down menu if you do not want to disassociate the entire group.
5. Click **Disassociate**. A "Confirm the disassociation of the following card range(s)" confirmation page will display. Click **Confirm**. A success message will indicate this has been completed.
6. Tap cards at an ORCA card reader after 24-48 hours, but within 60 days, to complete disassociation.

To disassociate a group of cards (refer to [page 18](#) for the effects of disassociating cards):

1. Log in to the **Business Account** website.
2. Select **Cards** from the left navigation bar, but do not enter any card information.
3. Click **Disassociate Card(s)**.
4. On the next screen, select a Group name in the drop down box for **Groups**.
5. Click **Disassociate**. A "Confirm the disassociation of the following group" confirmation page will display. A success message will indicate this has been completed.
6. Tap cards at an ORCA card reader after 24-48 hours, but within 60 days, to complete disassociation.

To disassociate a large group of non-consecutive cards via an import file (refer to [page 18](#) for the effects of disassociating cards):

You must first create and export a file of cards in .XML or .CSV format. Please see [Appendix B](#) for details.

1. Once file is exported, using the appropriate file editor, make any changes necessary to the file and save it.
2. Log in to the **Business Account** website.
3. Select **Cards** from the left navigation bar, but do not enter any card information.

4. Click **Disassociate Card(s)**.
5. On the Disassociate Card(s) screen, click **Browse** for the newly saved file where indicated then **Upload File**.
6. You will see a message to confirm the disassociation and notes explaining the impacts of doing so.
 - You can also enter an email address for notification that disassociation process has been completed.
7. Click **Confirm** to complete process.
8. Tap cards at an ORCA card reader 24-48 hours after process completion, but within 60 days, to complete disassociation.

CARDS

A business can look up card details to see products on cards, block and unblock individual cards or individual products on cards and replace lost or damaged cards. These actions occur through the actionlist process. See [Appendix A](#) for details on the actionlist process.

LOOK UP CARD DETAILS

1. Select **Cards** from the left navigation bar.
2. Select the card using any of the following search criteria:
 - a. A specific card serial number
 - b. Branch and group criteria
 - c. Card status (e.g. active or blocked)
 - d. Type of product on the card.
3. Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.
4. Click on the serial number of the card to see details.
5. View card status, group and products on the card. On this screen there are also options to block (or unblock), move, replace or disassociate the card.

BLOCK A CARD

A Business Account can block a card for the following reasons:

- Card is lost or stolen or card is not returned by former employee.
- Card is damaged or defective.

Blocking an individual card blocks **ALL** products loaded on that card.

NOTE: The recommended blocking reason is Other. Cards blocked with a reason of Permanent cannot be unblocked.

NOTE: Do not block a card if you intend to replace it/transfer funds to an empty card you have in stock or to a new card. Please refer to Card Replacement Procedures on [page 23](#).

1. To block a card, select Cards from the left navigation bar.
2. Select the card to block using any of the following search criteria:
 - a. A specific card serial number
 - b. Branch and group criteria
 - c. Card status (e.g. active or blocked)
 - d. Type of product on the card.
3. Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.
4. Select the card you wish to block by clicking the **card serial number**.
5. The Card Account details – for card “xxxxxxx” will appear.
6. Click **Block Card**.
7. Select the **reason** for blocking the card from the drop down menu.

NOTE: We do not recommend blocking cards with a reason of Permanent because they cannot be unblocked.

8. Click **Confirm** to complete the block card action. The Card Account Details screen display will indicate the card status as blocked.

UNBLOCK A CARD

You may unblock a card that has previously been blocked, except if it was blocked with a reason of Lost/Stolen or Permanent.

1. To unblock a card, select **Cards** from the left navigation bar.
2. Select the card to unblock using any of the following search criteria:
 - a. A specific card serial number
 - b. Branch and Group criteria
 - c. Card status (e.g. Active or Blocked)
 - d. Type of product on the card.
3. Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.
4. Select the card you wish to unblock by clicking the **card serial number**.
5. The Card Account details – for card “xxxxxxx” will appear.
6. Click **Unblock Card**.

NOTE: We do not recommend blocking cards with a reason of Permanent because they cannot be unblocked.

7. Click **Confirm** to complete the unblock card action. The Card Account Details screen display and will indicate card status as active.

NOTE: Card must be tapped at an ORCA card reader after 24-48 hours but within 60 days to complete the action.

BLOCK A PRODUCT

It is not necessary to block product(s) on a card if you have already blocked or intend to block the card. While the functionality exists, the Block Product function is seldom used. Blocking a product occurs through the actionlist process.

NOTE: There are no refunds for a blocked product. It is recommended that a company collect cards from employees who leave and reissue to other employees as needed instead of blocking product.

1. Select **Cards** from the left navigation bar.
2. Select the card that you want to block using any of the following search criteria.
 - a. A specific card serial number
 - b. Branch and Group criteria
 - c. Card status (e.g. active or blocked)
 - d. Type of product on the card
3. Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.
4. Click the **serial number** of the card that you want to block products on. The **Card Account Details – for card “xxxxxxx”** will appear.
5. Click **Block/Unblock Products** at the bottom of the page.
6. **Select** the **product(s)** you want to block, click **Blocked** for those product(s).
7. Select a **Blocking Reason** from the drop down menu.
8. Click **Update** at the bottom of the page.
9. You will receive a message asking if you are sure you want to block/unblock the product. Click the appropriate answer.

The screen will refresh with a green **“Confirmation”** message indicating the selected products have been action listed to be blocked.

NOTE: Card must be tapped at a card reader after 24-48 hours and within 60 days to complete action.

UNBLOCK A PRODUCT

A Business Account representative can unblock products. Unblocking a product is accomplished through the actionlist process.

1. Select **Cards** from the left navigation bar.
2. Select the card with the product you want to unblock using any of the following search options:
 - a. A specific card serial number
 - b. Branch and Group criteria
 - c. Card status (e.g. active or blocked)
 - d. Type of product on the card.
3. Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.
4. Click the **serial number** of the card that you want to unblock products on. The **Card Account Details – for card “xxxxxxx”** will appear.
5. Click **Block/Unblock Products** at the bottom of the page.
6. Select the **product** you want to unblock, click **Unblocked** and type in a reason for unblocking (optional).
7. Click **Update**.
8. You will receive a message asking if you are sure you want to block/unblock the product(s). Click the appropriate answer.

The screen will refresh with a green **“Confirmation”** message indicating the selected products have been actionlisted to be unblocked.

NOTE: Card must be tapped at a card reader after 24-48 hours and within 60 days to complete action.

REPLACE CARD

If a card on a Business Account is lost, stolen, damaged or defective, it can be replaced and all valid products moved to an empty card. The replacement cost would be the current fee for an ORCA card (\$5), unless you have a supply of empty cards. If a card is defective and is within the 12 month warranty, the replacement fee will be waived. Surrender the card to your Lead Agency so they can determine if the card is defective.

NOTE: You may not replace a **youth** card to an existing card in inventory unless it is an unused empty youth card that has the same **youth card expiration date** and is associated with your Business Account. If no appropriate card is in inventory you need to replace a youth card to a new replacement card (see step 6). If you need to replace a **Regional Reduced Fare Permit** you must order a new replacement card (see [page 24](#) to Replace RRFP Card). Or, please [contact your Lead Agency](#) for assistance.

NOTE: If you have placed an order to add product to the card being replaced and the order is currently in pending or confirmed status, you must remove the card being replaced from the order (or cancel the order). The replacement transaction WILL NOT transfer the product order to the replacement card unless the order is in completed status.

1. Select **Cards** from the left navigation bar.

2. Enter the card serial number to be replaced and click **View**.
3. Click on the card serial number (shown on the lower left of screen).
4. Click **Replace Card** (you should be on the card details tab; if the card is blocked, you must first unblock).
5. Select the option you wish for replacement.
6. If a **new card provided by ORCA**, go to steps 8-10 (you will pay the \$5 card fee by credit card. If paying by check, please [contact your Lead Agency for assistance](#)).
7. If a card from **existing inventory**, go to steps 11-13 (you must have a never used, empty card in stock, with no product or transaction history).

NEW CARD - If you are paying by Visa or MasterCard:

Credit card payment screen appears; complete all requested information.

NOTE: Cardholder name and billing address on credit card must match what the issuing bank has on file.

8. Click **Make Payment** (click one time only).
9. Credit card receipt will display if the transaction is successful. Print if a copy is needed. The system will not retain this document for future printing.
10. The original card is permanently blocked. Your replacement card will be shipped to the delivery address on file for your account in a few days. Any pass products will be automatically transferred to the new card. E-purse will transfer in 8-10 days and requires the new card be tapped at an ORCA card reader after that period but within 60 days to download the funds.

EXISTING CARD:

11. Replace with existing **never** used, **empty** card with no product or transaction history.
12. Enter destination (new/empty) card serial number.
13. Click **Confirm**. Confirmation of your transaction will appear. Print for your records, the system will not retain this screen.
14. Tap new card at an ORCA card reader after 24-48 hours to download pass data. E-purse will transfer in 8-10 days and requires the new card be tapped at an ORCA card reader after that period but within 60 days to download the funds.
15. The original card is now **blocked permanently**.

REPLACE RRFP CARD

Business Accounts can replace Regional Reduced Fare Permit (RRFP) ORCA cards that are associated

with their account via the Business Account website in the same way that regular adult ORCA cards are replaced.

This can be done for both temporary and permanent RRFp cards, and those requiring a photograph (for persons with a disability) as well as those that do not (for seniors 65+), unless the temporary RRFp has expired. The replacement card will reflect exactly what is on the original card. Individuals with an expired RRFp must apply for a new one through a transit sales office.

For permanent RRFp ORCA cards as well as temporary ones that are still valid, the replacement process will generate a card that will be valid under the same name and automatically registered to the person holding the original card. The card will also automatically be associated with your business account and any product on the original card will transfer to the new card. The old card will be permanently blocked and cannot be unblocked even if later found.

There are some restrictions.

- If the cardholder's photograph is not on file in the Regional ORCA mail center, the replacement card will need to be issued in person so a photograph can be taken.
- The replacement card must be ordered via your business account website and paid for in advance. The cost of the replacement card will be whatever your account normally pays for cards, e.g., currently either \$3 or \$5 depending on how your account is set up.
- As with all replacement cards, if you have placed an order to add product to the card being replaced and the order is currently in pending or confirmed status, you must remove the card being replaced from the order (or cancel the order). The replacement transaction WILL NOT transfer the product order to the replacement card unless the order is in completed status.

Note: You MUST order a new replacement RRFp from the mail center. You cannot use an empty Adult card in your inventory because RRFp cards are issued to an individual.

1. Select **Cards** from the left navigation bar.
2. Enter **Card Serial Number** - This is the card to be replaced.
3. Click **View**.
4. Click on the Card Number.
5. Click **Replace Card** - If the card is **Blocked**, you must first **Unblock** it. If the card was blocked as **Permanent** this replacement process cannot be used. Disassociate the card and then have the cardholder go to a customer service location in person for a replacement.
6. Select the Option **Use a new card provided by ORCA** - You must pay card fee by Credit card.
7. Credit Card screen will appear, complete all requested information - Please Note: Name and billing address on credit card must match what the bank has on file.
8. Click MAKE PAYMENT - **Click one time only**.

9. Credit card receipt will appear if the transaction is successful - Print if you need a copy. The system will not retain this document.

10. The Original Card is PERMANENTLY BLOCKED - You will receive your replacement card in the mail in a few days. Pass products will be on the card. E-purse will transfer in 8-10 days and requires the card be tapped at the ORCA reader at that time.

Contact your Lead Agent if you have any questions.

CARDHOLDER REGISTRATION

Business cardholders may manage their ORCA cards online by registering their card at orcacard.com and set up an online account. They will be able to review the products loaded on the card and the E-purse balance.

In addition, they will be able to load additional products and/or E-purse value, plus check their transaction history.

ORCA cards purchased by or associated with a business account are the property of that business and any product purchased directly by the cardholder also become the property of the business. Cardholders must report any issues with their cards to the business and the business must contact their Lead Agency for assistance.

There are no refunds issued to a cardholder by the Lead Agency. Refund requests must be made by the business to the Lead Agency (for E-purse only; passes are non-refundable) and the card must be permanently surrendered for refund processing. Lost, damaged or stolen cards should be reported to the business for replacement processing, if necessary.

E-VOUCHERS

An e-voucher allows a Business Account to provide funds on an ORCA card which can then be redeemed automatically (to the card's E-purse), at an agency customer service center, a retail location, a ticket vending machine, or online. See [Appendix C](#) or [contact your Lead Agency](#) for more details on e-vouchers.

GENERATE REPORTS

A Business Account can generate the following reports:

- Expired Vouchers
- Institutional Card Status
- Institutional Linked Ridership Summary
- Institutional Transaction History
- Institutional Unlinked Ridership Summary
- Unredeemed Products

There are additional reports you will see listed that are either not available or only available to particular accounts:

- Institutional Card Account Transaction History – only for WSF Commercial Accounts
- Institutional Card Group Management – only for University of Washington
- Institutional Vanpool Subsidy Status – not currently available
- Institutional Vanpool Usage – not currently available

NOTE: Due to privacy concerns, none of the ridership reports include card serial numbers. Be aware that if cards are disassociated from the Business Account and no longer appear on list of cards, those card numbers may continue to appear on reports (below) because history of the card(s) remain in the system.

REPORT DESCRIPTIONS

- **Expired Vouchers** – Determine the total amount of expired E-vouchers for a particular month and year.
- **Institutional Card Status** – Displays the number of cards that have products loaded but are not currently in use, the cards which are in circulation but have no activity recorded against them within the current month, the cards which have been registered to an individual, all blocked cards as of the current point in time and all active cards.
- **Institutional Linked Ridership Summary:** Provides a summary of linked trip ridership statistics.
- **Institutional Transaction History:** Lists transaction data for business account cards (no serial numbers).
- **Institutional Unlinked Ridership Summary:** Provides detailed unlinked trip ridership statistics.
- **Unredeemed Products:** Provides details of products that were ordered, but not redeemed, during the billing period or the agreement period. These products include vouchers which are not redeemed because cardholders did not tap their cards within the required timeframes.

REPORT LOGIN

A Business Account can access the reports portal by logging in to the Business Account website (orcacard.biz) and clicking **Launch report generator** from the left navigation bar.

On the Reports login page, the user name is the 4-digit Business Account ID number and the password is the same as the Business Account website password. Update the following entries if they are different:

System: **osb-drc-cas-w12:6400**
 Authentication: **Windows AD.**

Once you login, select **Documents** tab, then click **Folders**, double-click **On Demand** and, finally, double-click **Institutions** to access your list of reports.

REPORT BASICS

To get started, **right-click** on any report or highlight the report and click **More Actions** to see a drop-down menu with options.

The options are:

- **View:** Instantly run a report. For some reports, you will be prompted to enter various parameters (e.g., date range). You can view the report on screen, print or export it.
- **Properties:** Provides a short description of the report including the dates the report was last run or modified.
- **Categories:** Business accounts can create sub-categories for storing certain reports. This feature is probably unnecessary for most users.
- **Schedule:** Use this parameter to schedule the report to run now, at some future time or on a periodic basis. You have many options to customize the report using this option, including applying filters and having the report automatically emailed when it is run.
- **History:** Past occurrences of each report will be stored and you can select one to view using the History option.
- **Details:** Provides a description of the report.
- **New, Add, Organize:** Additional options that may be displayed, but are non-applicable for business accounts reports.

SCHEDULE A REPORT

Right-click on the report you'd like to run or highlight the report and click on **More Actions** then click on Schedule. Specify all the options for the report you'd like to run as follows:

- **Instance Title:** Edit the provided title if you'd like something that is more meaningful to you.
- **Recurrence:** Specify when you'd like the report to run. The most commonly chosen option is Now, but you can also choose to have a report run automatically at certain frequencies.
- **Prompts:** Click **Edit Values** to fill in the report parameters. This step is critical because you need to have some value filled in for each parameter or the report will not run.
- **Formats:** Choose the file format you'd like for the report. Microsoft Excel (97-2003) (Data Only) or Separated Values (CSV) works well for data analysis. PDF works well for presentations.
- **Destinations:** Choose where you'd like the file delivered. The Default Enterprise Location will save the file in the history for that report. Select Email to have the file emailed directly to you. Enter the 'from' address as anything that makes sense to you and won't get rejected by your email system (most users enter their own email address). The 'to' field is for the email address where you'd like the report sent. In most cases, both the 'from' and 'to' email addresses will be your email address.
- **Filters, Print Settings, Events and Scheduling Server Group:** These are all options that are displayed, but are non-applicable for Business Account users.

Once you have specified all your options, click Schedule in the lower right-hand corner. The report will begin running and will say "complete" when finished or send an email depending on the options you specified.

APPENDIX A – ACTIONLIST: ACTION NEEDED TO COMPLETE CARD CHANGES

Most changes you make to your ORCA cards from the Business Account website require the card be tapped at an ORCA card reader before the action can be completed.

Examples of changes include:

- Blocking or unblocking cards
- Moving cards between groups and branches
- Adding product and/or E-purse value to card
- Disassociation of a card.


Remember, to complete/activate a change made from the Business Account website, the following must also happen:

- An ORCA system download (Downloads happen twice daily - at approximately 2:00 a.m. and 2:00 p.m.)
- ORCA readers must receive the change message (*takes 24 to 48 hours*)
- **Cards must be tapped*** (usually 48 hours after change is initiated).

*Cardholders may tap their ORCA card to complete the change as follows, matrix example uses adding value:

| Reader Location | Reader Display Example |
|--|--|
| On a bus | Pass \$X.XX* "Added Pass" \$X.XX <i>*NOTE: Amt. listed will be Pass value (monthly) - Passport (annual) shows \$0.00</i> |
| WSF Turnstile | Card will update, but no message will display. |
| Stand Alone Readers (e.g., yellow devices at train, rail, SWIFT and Rapid Ride stations) | International District (location), 01/04/2010 (date) Fare paid \$X.XX "Card Revalued" <i>NOTE: If using the Stand Alone simply to activate change with no trip, tap off once message is read, this cancels your trip.</i> |
| TVM | Screen Display Example |
| ORCA and Ticket Vending Machine (TVM) | Action: Place card in card reader Action: Touch screen on button – "Show ORCA Card Details" TVM Message: E-purse value or Pass is listed on card detail screen |
| Reader Display: Red text = confirmation that change has taken place, otherwise follow procedures as listed. | |

APPENDIX B – .XML AND .CSV FILE STRUCTURE

Click the Attachments  icon to view samples of basic .XML and .CSV file structures for common actions on the Business Account website. Much of the coding is unique to your Business Account. These are just samples for format purposes. You will need an .XML or .CSV editor to make changes to these files.

Please seek the expertise of your Information Technology Department should you need assistance.

A Business Account can export data by:

- Clicking on any order on the orders page and then clicking Export Order at the bottom of the order page.
- Clicking Export group at the bottom of the groups page.

Note: If the Business Account elects to order products that were not part of the original exported order (either .CSV or .XML file), a new file will need to be exported in order to identify the unique product code for the new product, e.g., a \$5.75 PugetPass. That unique identifier can then be included in future imported files. This is necessary because each product code is unique to each Business Account.

APPENDIX C – E-VOUCHERS

E-vouchers may be purchased by a Business Account for cards on the account on a month-to-month basis in variable amounts, up to a maximum of \$300. The e-vouchers may then be “redeemed” by the cardholder to purchase a monthly pass or to load funds in an E-purse. For example, a Business Account may have several employees who have unique transit needs – some may commute by ferry, while others ride in a Metro vanpool or take Sounder (commuter rail), etc. – using e-voucher, the business can subsidize their commutes by providing a voucher in a flat amount for those employees to purchase the product they need. An employee may apply the value of the voucher towards the cost of the product.

The benefit of the e-voucher program is that the value of any unredeemed vouchers (not redeemed by the cardholder) will automatically be refunded to the Business Account, based on the Lead Agency’s refund cycle (approximately 60 days following the expiration of the voucher). Money loaded automatically into E-purse can only be refunded via the refund process of turning in and permanently blocking the card and paying a \$10 refund fee.

[Contact your Lead Agency](#) for more information or if you’d like to establish an e-voucher program.

Before establishing an e-voucher program, you must determine the voucher values in advance and have them set up by the Lead Agency. A decision is made by the Business Account to allow cardholders to redeem vouchers remotely (**remote** revalue), automatically (**automatic** revalue) or a combination of the two (**both**).

1. The **remote** setting means that the cardholder must take an action to spend the voucher. The cardholder must **register** his/her card. Products must be purchased either online through a personal My ORCA login – orcacard.com– or at an agency customer service center (not at an ORCA retail location). Remote vouchers expire **31 days** from the date the voucher product order is approved.
2. The **automatic** setting means that the voucher value will automatically download to the cardholder’s **E-purse** when the card is tapped at an ORCA card reader. The cardholder can use the E-purse value to pay for individual trips or to purchase a monthly pass. The cardholder cannot change this setting. Automatic vouchers expire 60 days from the date the voucher product order is approved.

NOTE: When using E-purse to purchase a product, the cardholder must do so in a “card present” environment (e.g., at an Agency customer service center, participating retailer location or ticket vending machine). The cardholder cannot use E-purse value to make a purchase online or by phone.

3. The **both** setting means that the voucher value will automatically download into the cardholder’s E-purse when the card is tapped at an ORCA card reader, unless the cardholder chooses to update the revalue setting to **remote** on their personal ORCA account. If the cardholder changes the setting to remote, remote rules (see above) will apply.

NOTE: The setting defaults to **automatic** for the first month on each card set up with a **both** setting to receive an e-voucher. Following that first month, the cardholder can change the setting to **remote** if he/she chooses to do so.

CHANGE E-VOUCHER SETTINGS

Most companies find that the **both** setting provides the most flexibility to the cardholder. Once set, a Business Account representative may not change its e-voucher program from automatic revalue to remote revalue.

However, a Business Account representative may change its e-voucher program from remote to automatic for an individual card or for a group of cards, if the Lead Agency established it as a remote setting. The steps to make this change are described below.

NOTE: Once you change the e-voucher setting to **automatic**, you, or the cardholder, cannot change it back to **remote**.

1. Select the card or group that you want to change to automatic using any of the search criteria available.
 - a. Branch and group criteria
 - b. A specific card serial number
 - c. Card status (e.g. active or blocked)
 - d. Type of product on the card.
2. Click **View** after selecting the search criteria. A list of cards meeting those criteria will be returned.
3. Click the **serial number** of the card that you want to change to automatic revalue. The **Card Account Details – for card “xxxxxxx”** will appear.
4. Click **Change to Automatic**.

You will be redirected to the “Card Account Details” screen, which will indicate the voucher revalue type has been successfully changed.

NOTE: As indicated prior to these instructions, once you change the e-voucher setting to **automatic**, you, or the cardholder, cannot change it back to **remote**.

USE OF E-VOUCHERS BY EMPLOYEES

If the Business Account chose either the **both** or the **automatic** setting, the e-voucher value, once purchased by the Business Account, will automatically transfer to the E-purse when the cardholder next taps his/her card, following the 24 to 48 hour waiting period.

NOTE: When using E-purse to purchase a product, the cardholder must do so in a card present environment (e.g., at an agency customer service center, a participating retailer location or a ticket vending machine). The cardholder cannot use E-purse value to make a purchase online or by phone.

The following **cardholder directions** will help your employees successfully **change an e-voucher from automatic to remote**.

1. Wait until after the first e-voucher has been redeemed (the first e-voucher on any individual card under a **both** or an **automatic** setting will always be **automatic and download to an E-purse**).
2. Log into ORCA (orcacard.com).

3. Register your card if you have not already done so.
4. Log into your My ORCA login.
5. Click Update Autoload type (if the Business Account set the e-voucher as automatic).
6. Change the Autoload setting to remote.
7. Wait 24 to 48 hours for the system to recognize the change.

The following **cardholder directions** will help your employees successfully **use a remote e-voucher to purchase a product**. The cardholder can redeem a remote e-voucher via a My ORCA login at orcacard.com or in person at an agency customer service center using these instructions.

1. Log into your My ORCA login at orcacard.com.
2. Register your card if you have not already done so.
3. Click Have a Card.
4. Log into your My ORCA login.
5. Select Add Value from the left navigation bar. Do not use any other Add Value link.
6. Select the type of product you'd like to add to your card.
7. Choose a pass product.
8. Choose the month.
9. If there are more passes needed choose 'Continue Shopping' and repeat steps 5, 6 and 7.
10. Click Pay now.
11. If you have a valid e-voucher, the next screen will show Pay by Electronic Voucher.
12. Choose the radial button that lists your company's name and click Continue.
13. Complete the payment information. If needed, use a debit/credit card for remaining balance.
14. Click Submit payment.
15. Your receipt will appear, click Print receipt and keep for your records.
16. It will take up to 48 hours for your PugetPass, Washington State Ferries pass or E-purse purchase to be validated. Make sure to purchase the product at least two days prior to date of use.

The following rules apply to cardholder changes to e-voucher settings:

| Agreement Revalue Type | Order Revalue Type | Card Revalue Type | Cardholder Actions |
|-------------------------------|---------------------------|--------------------------|---------------------------|
| Remote | Remote | Remote | Cannot change |
| Automatic | Automatic | Automatic | Cannot change |
| Both | Automatic | Automatic | Can update to remote |