HRIS – Human Resources Information Solution

RESOURCE GUIDE:
AGENCY TRANSIT CARD
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Transit Card Maintenance

Platinum Pass Program

Capitol Rideshare provides a subsidy to State employees, who reside in Maricopa County and, who commute to work using a Valley Metro bus or the light rail. The employee completes the GAO-624 Platinum Pass Application and Payroll Deduction Authorization to obtain their initial card and any subsequent replacement cards (if original is lost, stolen or damaged). Eligible rides are tracked using the Platinum Pass card.

The initial card is free and the fare is deducted on a pre-tax basis from the employee’s paycheck in the following month.

Process Overview

1. Employee completes Platinum Pass application
2. Application processed by Agency Transit Card processor
3. Transit card mailed to employee’s home address by Arizona Department of Administration – General Accounting Office (GAO)

*Note: GAO-624 Platinum Pass Application must be signed by employee before Transit Card can be issued or replaced. The application is retained by the agency.*

Assign a New Transit Card AZ10.1

Field Descriptions

HRIS screen AZ10.1 Employee/Transit Card Maintenance displays an employee’s Transit Card history and is used to assign a new Transit Card or cancel an existing Transit Card. The most recent Transit Card assigned is displayed in row 1.

<table>
<thead>
<tr>
<th>HRIS Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Card Type. (E) Express Card is the only type of card issued by the State</td>
</tr>
<tr>
<td>St</td>
<td>Card Status:</td>
</tr>
<tr>
<td></td>
<td>A Active</td>
</tr>
<tr>
<td></td>
<td>D Final Billing Requested</td>
</tr>
<tr>
<td></td>
<td>G Inactivated by GAO Central Payroll</td>
</tr>
<tr>
<td></td>
<td>I Inactive</td>
</tr>
<tr>
<td>Replaced Card</td>
<td>Previous Card that had billing linked to the new Transit Card</td>
</tr>
<tr>
<td>Pre-Pay</td>
<td>Amount entered was paid by the employee outside of the normal monthly billing cycle or amount is pending as a one-time deduction to be taken from the employee’s paycheck</td>
</tr>
</tbody>
</table>
| Start/End Dates | Start Date – Date Transit Card is Issued  
                              End Date – Date Transit Card is Canceled                                                                                              |
Issue a Transit Card

An employee can request a Transit Card by completing the Form GAO-624 and submitting it to their Agency Transit Card liaison. The agency reviews the GAO-624 for completeness and processes the request using the AZ10.1 screen in the HRIS. GAO Central Payroll mails the card to the employee’s Home Address in HRIS during weekly processing.

1. Type **AZ10.1** in search field, click **Go**
2. **Company**: Type or select **1**
3. **Employee**: Type or select the **Employee Identification Number**
4. Click **Inquire**
5. Click **Assign EXP Card**

*If Assign EXP Card is not available, the employee has an active card displayed in the first row. Proceed to Issue Replacement Transit Card section of training guide*

6. Sub-form **AZ10.4** displays
Sub-form AZ10.4

7. Click **OK** to Assign the Transit Card

OR

8. Click **Cancel** to return to AZ10.1
   - The Transit Card will not be issued if you click **Cancel**

Transit Card successfully issued displays on AZ10.1.

*Note: If a Transit Card is assigned in error contact GAO Central Payroll the ‘same business day’. GAO may be able to reverse the action.*
Employee/Transit Card Comments Maintenance AZ10.2

Adding Comments to the Transit Card is optional. To add comments or view comments, follow the steps below.

1. On the AZ10.1 click C

2. The AZ10.2 Employee/Transit Card Comments Maintenance screen displays

Comments are optional. To add a new comment:

3. FC: Type or select A

4. Comment: Type in comment

5. Click Insert Message(s). Status bar displays message Change Complete – Continue

6. Click Back to return to AZ10.1
7. Click Inquire
   - The Comments box now displays a numerical value of 1 instead of C indicating comments exist

Issue Replacement Transit Card AZ10.1
An employee can request a new card by completing the GAO-624 form and selecting the Replacement box.

1. Type AZ10.1 in search field, click Go
2. Company: Type or select 1
3. Employee: Type or select the Employee Identification Number
4. Click Inquire
5. Click Replace with EXP Card

*Note: If Replace with EXP Card is not available, the employee does not have an active card. Proceed to Assign a New Transit Card section of training guide.*
Sub-form **AZ10.6 Replace with EXP Transit Card** displays.

6. **Comment**: Leave blank or type a comment

7. Click **OK** to Replace the Transit Card

**OR**

8. Click **Cancel** to return to **AZ10.1** without issuing a replacement

**Note:** A replacement fee of $5 will be deducted from the employee’s next paycheck and will appear as deduction code 3513 – BUS CARD – REISSUE – EE.

The Replacement action end dated the old card and issued a new card. The old card number is displayed in the **Replaced Card column in row 1**. The cards are linked together for billing purposes.

**Note:** If a Transit Card is replaced in error contact GAO Central Payroll ‘the same business day’. GAO may be able to reverse the action.
**Cancel Transit Card (No replacement) AZ10.1**

Use the **AZ10.1** to cancel a Transit Card at the request of an employee. A card must be canceled when an employee is leaving State service. Transit cards are considered State property and must be returned at separation.

*Do not cancel a card if the employee is transferring to another State agency.*

The card will transfer with them to their new agency.

1. Type **AZ10.1** in search field, click **Go**
2. **Company**: Type or select **1**
3. **Employee**: Type or select the **Employee Identification Number**
4. Click **Inquire**
5. Click **Cancel Card**
   - Sub-form **AZ10.8 Cancel Transit Card** screen displays
6. **End Date**: Leave as current date or select a future date. The End Date represents the last day an employee can use the Transit Card.
   - **Defaults to current date**
   - **Do NOT** use a date in the past
   - **Do NOT** use a Saturday, Sunday or State Holiday Date

7. Select the **Reason** card is being canceled:

<table>
<thead>
<tr>
<th>Reason</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>L - Lost Card</td>
<td>Transit Card was lost, or Employee wants to cancel a card without a replacement</td>
</tr>
<tr>
<td>S - Stolen Card</td>
<td>Transit Card was stolen</td>
</tr>
<tr>
<td>F - Left State Service</td>
<td>Employee left State service and already received their final paycheck</td>
</tr>
<tr>
<td>G - Damaged</td>
<td>Transit Card was damaged or is not recognized by bus reader</td>
</tr>
<tr>
<td>D - Final Billing</td>
<td>Employee is leaving State service and needs current month charges taken from the final paycheck</td>
</tr>
<tr>
<td></td>
<td>This option initiates a request to the Transit Card to vendor to provide current usage charges outside of the normal monthly billing cycle</td>
</tr>
</tbody>
</table>

8. **Termination Date**: select Employee’s last day of work
   - **Required** if the Reason D **Final Billing** is selected
   - Leave blank if any reason other than D is selected

9. Click **OK** to cancel the card

OR

10. Click **Cancel** to keep the card active and return to the AZ10.1
End Date is now populated. The **Cancel action** creates a comment containing the user ID and the Reason selected on AZ10.8. View comments generated by clicking the comment box.

**Note:** If a Transit Card is canceled in error contact GAO Central Payroll the same business day. **GAO may be able to reverse the action.**
Transit Card Reports

Replaced Canceled Transit Cards Report AZ273

Use the Replaced-Canceled Trans Cards (AZ273) report to create a register of all replaced and canceled Transit Cards for a specific agency, date, and/or reason code. This report is used by GAO to transmit a log of canceled Transit Cards to the vendor for deactivation and final usage details. The report also includes Transit Cards that will be linked together.

Create Report Parameters

1. Type AZ273 in search field, click Go
2. **Job Name**: Type a unique name for the report
3. **Job Description**: Type a detailed description of the report
4. **Company**: Type or select 1
5. **Agency**: Type or select the two-digit Agency Code
6. **Date**: Select Date the Transit Cards were replaced/canceled
7. **Reason**: Leave blank or select a Reason to limit results
8. Click Add to save report parameters. Status bar displays message **Job Added**
Submit Report

1. Click Quick Submit, status bar displays message **Job has been submitted**
2. Click Print Mgr to view the report results in your Print Manager

For additional instructions on how to view reports, see the ‘Agency HRIS Intro Training for On Demand Reports’.

**Example of Report Results**

![Example of Report Results](image-url)
Inactive Employees with Active Transit Cards Report AZ278

Use the Inactive Emps – Active Transit (AZ278) report to view employees in a selected status that have Active Transit Cards.

Required agency action: Cancel the cards on AZ10.1 to prevent further charges from incurring and becoming 100% chargeable to the Agency.

Create Report Parameters

1. Type AZ278 in search field, click Go
2. Job Name: Type a unique name for the report
3. Job Description: Type a detailed description of the report
4. Company: Type or select 1
5. Agency: Type or select the two-digit Agency Code
6. Status: Select Pending Termination or Final Termination Status
   - Recommended Status: T1, T2, R1, R2, R3, U1, U2, L4, L5, M2, M3, W2, W3
7. Click Add to save report parameters. Status bar displays message Job Added
Submit Report

1. Click **Quick Submit**, status bar displays message **Job has been submitted**
2. Click **Print Mgr** to view the report results in your Print Manager

Example of Report Results

```
<table>
<thead>
<tr>
<th>Employee</th>
<th>Status</th>
<th>Transit Card</th>
<th>Department</th>
<th>Process Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>124211 MONICA GELLER</td>
<td>T2</td>
<td>586445554</td>
<td>51120</td>
<td>DB510</td>
</tr>
</tbody>
</table>

Employee Count for Agency DE: 1
Employee Count for Company: 1
```
Employee Transit Card Report AZ283

Use the Employee Transit Card Report (AZ283) to view all active, inactive or both types of cards for the agency.

Create Report Parameters

1. Type AZ283 in search field, click Go
2. Job Name: Type a unique name for the report
3. Job Description: Type a detailed description of the report
4. Company: Type or select 1
5. Agency: Type or select the two-digit Agency Code
6. Processing Option: Select one below:
   - 0 Active View all active cards
   - 1 Inactive View all canceled cards
   - 2 Both View all cards
7. Click Add to save report parameters. Status bar displays message Job Added
Submit Report

1. Click **Quick Submit**, status bar displays message **Job has been submitted**
2. Click **Print Mgr** to view the report results in your Print Manager

Demand Reports

**Example of Report Results**

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Transit Card</th>
<th>Date</th>
<th>St</th>
<th>Process Level</th>
<th>Dept</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>RACHEL GREEN</td>
<td>1234567890</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JOEY TRIBBIANI</td>
<td>0123456789</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ROSS GELLER</td>
<td>8765432109</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PHOEBE BUFFAY</td>
<td>9876543210</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHANDLER DING</td>
<td>1234567890</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>