



## Optum Financial Commuter Benefits Instructions

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## Set Up an Optum Financial Account

1. If you do not currently have a Optum Financial Account, create one by going to <https://marincounty.optumfinancial.com>.
2. Click “**Member Sign In/Register**”.
3. Click “**Register Now**”.
4. Fill in the requested information and **personnel number** (Note: The personnel number field is labeled “**Your Login ID**”). The IRS requires this information for tax related benefits such as the transportation benefit.

**Let's get you registered**

Create your [HealthSafe ID®](#) to help protect the security of your personal health information.  
All fields are required unless marked as optional.

First Name

Last Name

Date of Birth (Month, DD, YYYY)

Month  DD  YYYY

Identification Type [Help](#)

ZIP Code

Your Login ID

**Personnel Number**

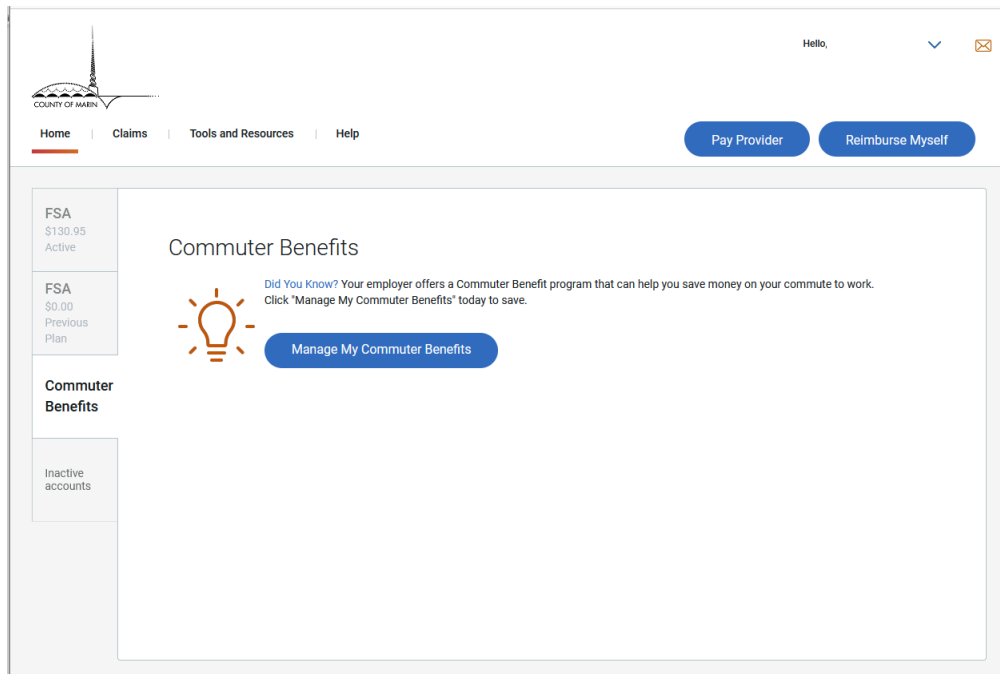
[Continue](#)

Click “**Continue**” to proceed through the registration wizard and complete additional steps to create your account.

If you have having problems registering or logging on, or have been locked out of your account, call the Optum Financial Technical Support line at 877-292-4040 (help is available 24/7). The RideGreen Team cannot provide technical support for Optum Financial.

## Access the Commuter Benefits Site

1. Enter your username and password to log onto your account.  
<https://marincounty.optumfinancial.com>.



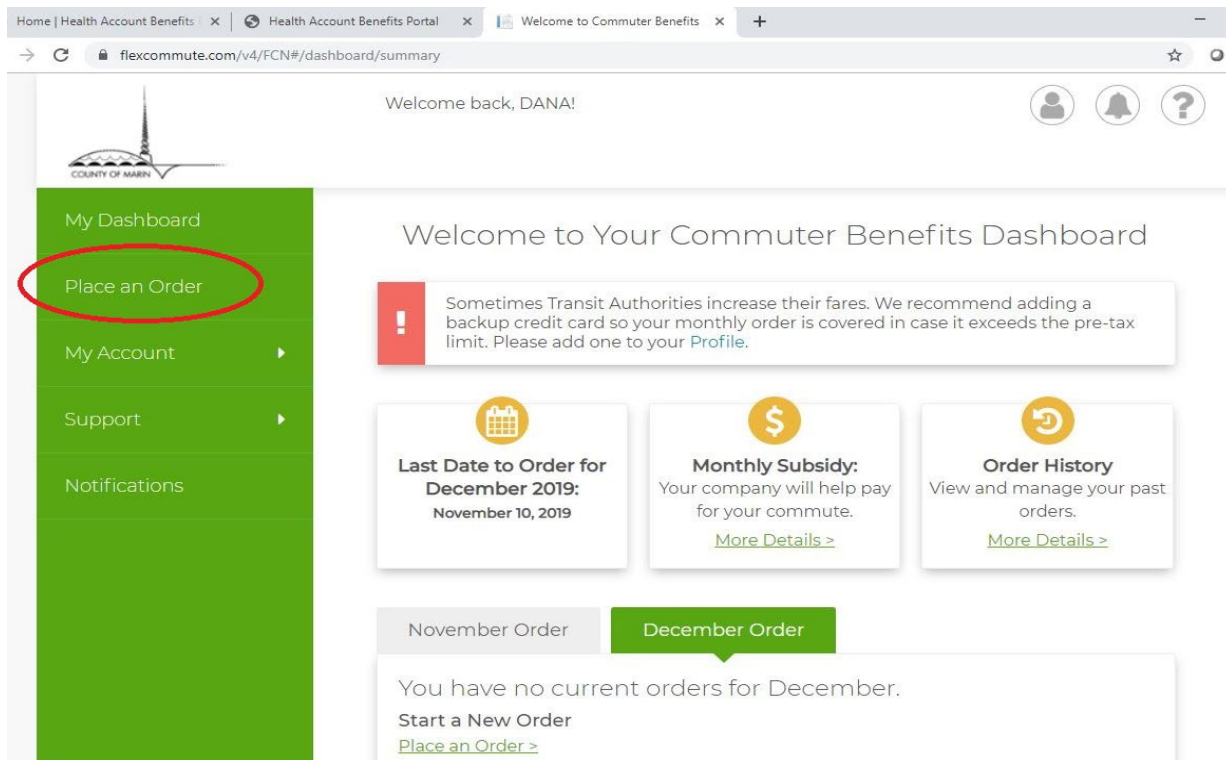
3. A pop-up window notifies you that you are being redirected to the Commuter Benefits site. Click **“Continue”**.

Your **pop-up blocker may be triggered**. If so, adjust your browser settings to **“Always Allow...”** access to this webpage. You must enable pop-ups in your web browser for Commuter Benefits to load properly. If you encounter blank pages or long waits for pages to load, check your browser settings or try using another browser with pop-ups enabled.

4. You will be redirected to the Commuter Benefits Dashboard (you must access this page through your Optum Financial online account. You will not be able to access by typing the link into your browser).

## **Use Optum Financial for Transit, Vanpool, or Parking**

1. To order a transportation product using your Pre-Tax Benefit and Transit Match Incentive, click on **"Place an Order"**:

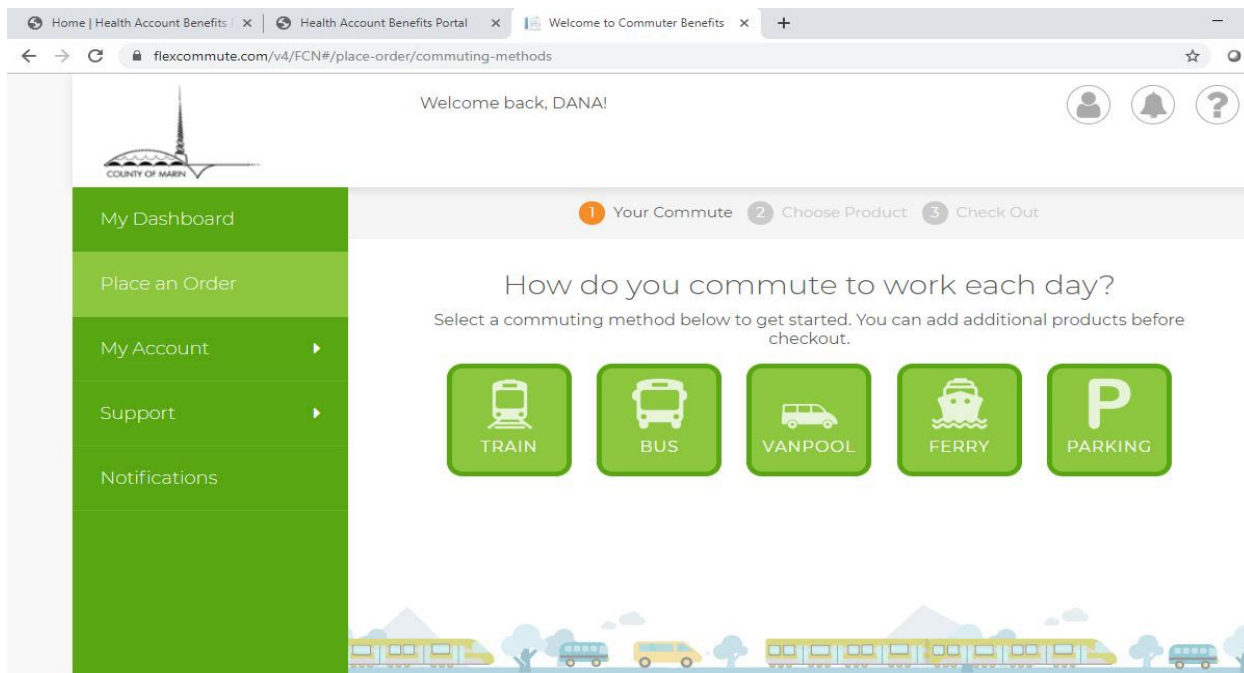


**Please note that all orders must be placed by the 10<sup>th</sup> of each month** for use in the following month. The “Benefit Month” and due date for ordering products for that month are indicated in the center of your Transportation Benefits Dashboard.

For transit passes and funds, you will need a valid Clipper Card. Loading Clipper Cards is the easiest and most efficient way to use your Pre-Tax Transportation Benefit. Most transit services use the Clipper Card for electronic ticketing. The Clipper Card is accepted on SMART, MUNI, BART, AC Transit, Caltrain, Golden Gate Transit and Ferry, FAST, Vine, Sonoma County Transit, SolTrans, VTA and San Francisco Bay Ferry. You are able to purchase transit passes for the service of your choice through your online Optum Financial account. Passes will be loaded directly onto your Clipper Card. **You must already have a Clipper Card in order to so do.**

**Request a free Clipper Card** by filling out the [Transit Benefit Program Clipper Card Request](#) and emailing the completed form to [custserv@clippercard.com](mailto:custserv@clippercard.com). Please allow for up to 10 days to receive your Clipper Card in the mail.

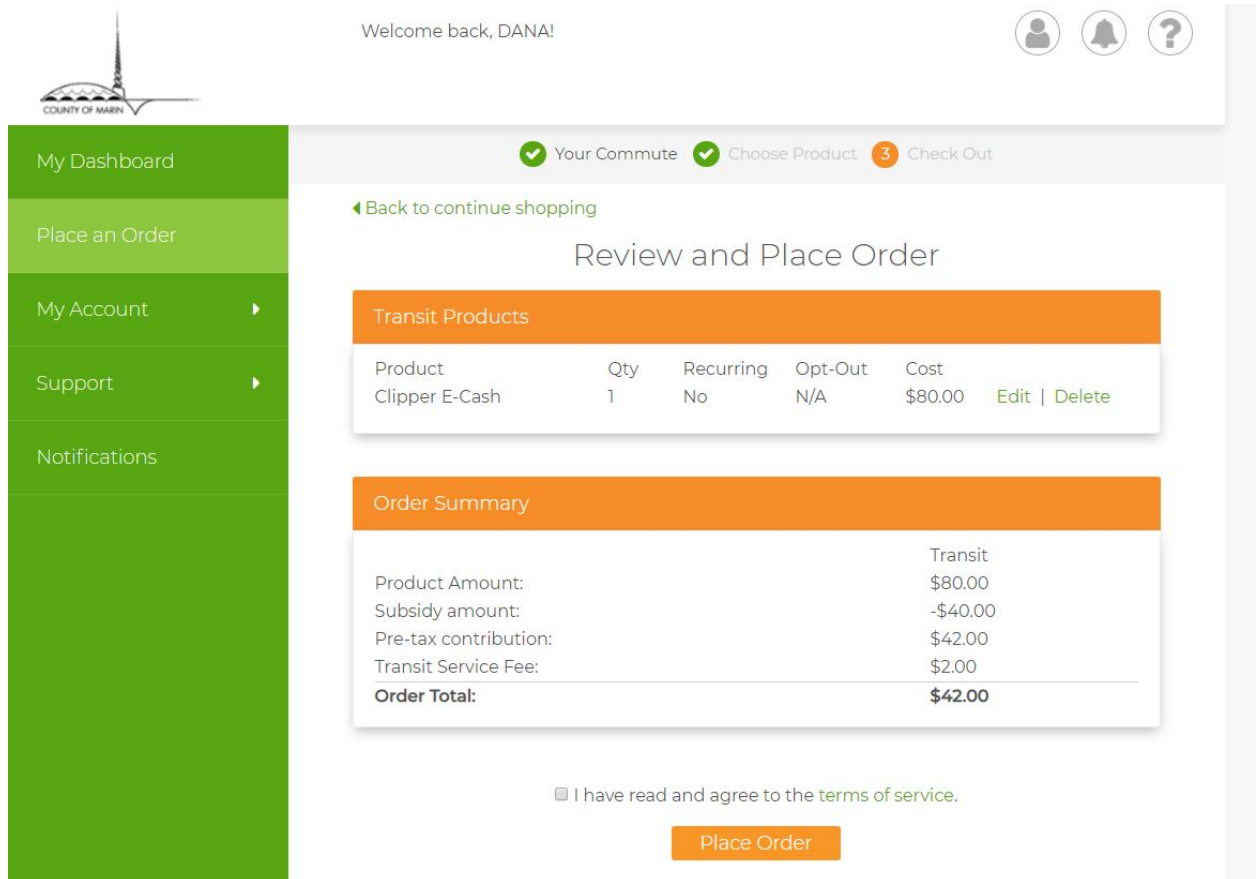
## 2. **Select** your Commute Mode: Train, Bus, Vanpool, Ferry or Parking:



### **Order Train and Bus Passes with Your Pre-Tax Benefit**

1. Click on the **Train or Bus** icons
2. Enter your Home zip code and your work zip code. Click **Next**.
3. Click on "Local Transit Authorities" to access all train/bus products.
  - a. To load your Clipper card with funds that can be used on any transit system (including SMART), search for "e-cash" in the search box or click "**Select**" next to Clipper and navigate to the E-Cash option.
  - b. To purchase a monthly pass, click "**Select**" next to SMART Sonoma Marin Area Rail Transit and select the pass that works best for you.
4. Once you select your product of choice, go through the order detail screens. Be sure to enter your correct Clipper Card number so that the pass/funds load correctly.

5. Select whether you want the same order to be placed every month
6. Click **Next**
7. Confirm your order and then click **“Proceed to Checkout”**



Welcome back, DANA!

My Dashboard  
Place an Order  
My Account  
Support  
Notifications

✓ Your Commute ✓ Choose Product 3 Check Out

◀ Back to continue shopping

### Review and Place Order

Transit Products				
Product	Qty	Recurring	Opt-Out	Cost
Clipper E-Cash	1	No	N/A	\$80.00

Edit | Delete

### Order Summary

Product Amount:	Transit \$80.00
Subsidy amount:	-\$40.00
Pre-tax contribution:	\$42.00
Transit Service Fee:	\$2.00
<b>Order Total:</b>	<b>\$42.00</b>

☐ I have read and agree to the [terms of service](#).

Place Order

9. Click **“Place Order”**
10. **What happens next?** Your order will be deducted from your next paycheck. If you submitted your order by the 10<sup>th</sup> of the month, you will be able to use your product at start of the following month. Orders will be processed and/or delivered by the 23<sup>rd</sup> of the month.

**For example**, if you submitted your order by the 10<sup>th</sup> of the month, your order will be processed or delivered by 23<sup>rd</sup>. You will be able to use your product starting 1<sup>st</sup> day of the following month.

**Please note** that your Pre-Tax Benefit **only** allows you to use a maximum of the [current IRS mandated limit](#) on pre-tax contributions towards transit. Any amount exceeding the IRS limit is subject to tax.

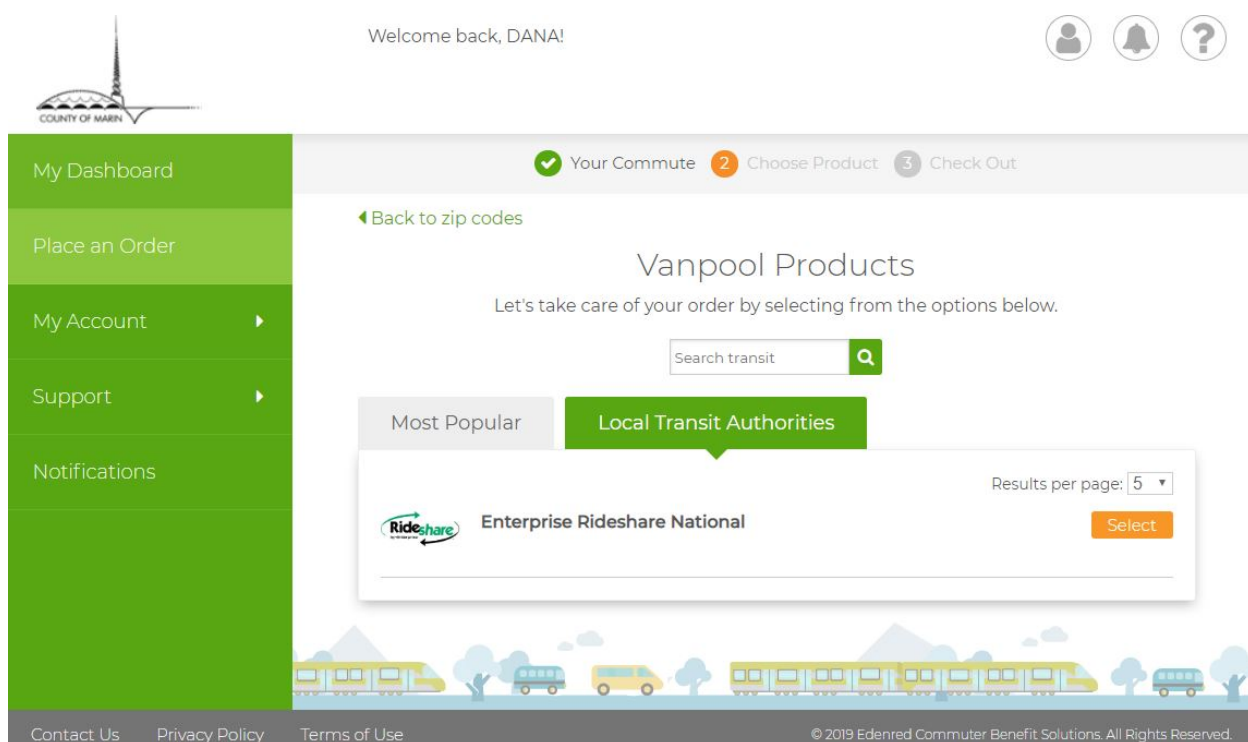


## **Pay for Vanpools**

A vanpool is typically a group of 5-15 people who regularly travel together to work 30 miles or more (roundtrip) using a van. Typically, riders pay a regular fare and maintenance fee. MTC and the County have partnered with [Enterprise Rideshare National](#) to offer vanpools to County employees.

To use your Pre-Tax Benefit towards a vanpool:

1. Work with [Enterprise Rideshare National](#) to set up your vanpool. Once the vanpool is set up, you will be given a Participant ID and Vanpool ID which will be used to apply your Pre-Tax funds to your vanpool in Optum Financial.
2. Click on the **Vanpool** icon on the Place an Order page.



4. Select **“Direct Pay Enterprise Rideshare National”**
5. Enter your Participant and Vanpool IDs and the amount you would like to pay towards the vanpool (determined when you set up the vanpool).
6. Click **Next**
7. Confirm your order and then click **“Proceed to Checkout”**
8. Remember, the County contributes a Vanpool Match Incentive (subsidy), a dollar for dollar match up to \$40, to those using their Pre-Tax Transportation Benefit! The

incentive will be automatically applied to your order at checkout.



### **Pay for Parking**

In addition to the Internal Revenue Service [mandated limit](#) on Pre-Tax Benefit for transit, you can use **an additional pre-tax amount for work-related parking**. Parking funds from the Pre-Tax Benefit are restricted to business entities that indicate their core business function is to “provide parking”. ***Please note: The County Transit Match does not apply towards the Pre-Tax Benefit for Parking.***

To access Pre-Tax Benefits for parking, select the **Parking** icon on the “Place an Order” page, and follow the prompts on the screen that relate to your parking options.

If you need further assistance in selecting your transportation benefits, please contact the RideGreen administrator at [ridegreen@marincounty.org](mailto:ridegreen@marincounty.org).