

Utah Transit Authority



EFC Web Interface Human Services User Guide

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Rev 1.0

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DOCUMENT PURPOSE

The purpose of this document is to describe basic functionality of UTA’s EFC web interface for Human Services coordinators. This document covers the following features of the web interface:

- UTA Contact Information
- Institutions
- User Management
- Card Account Management
- Reporting
- Reduced Fare applications

CONTACT UTA INFORMATION

Do you have a question, comment, or concern to share? Do you need to request additional cards? Are you looking for a copy of the most recent Human Services User Guide to help manage your cards online? Go to www.tap2rideuta.com and enter your login information. Then click on the *Contact UTA* tab in the left-hand navigation bar.

We are happy to help!

The screenshot displays the UTA Contact Information web interface. On the left is a navigation menu with icons and labels for 'Contact UTA', 'User Management', 'Institutions', 'Card Accounts', 'Reports', and 'Reduced Fare'. The main content area is titled 'UTA Contact Information' and includes the following sections:

- UTA Customer Service:** For route and schedule information including trip planning, fares or other UTA information, please call: 801-RIDE-UTA (743-3882) or go to <https://rideuta.com>. You can also Download the Transit app from Apple App Store or Google Play.
- Pass Programs:** To request additional card inventory, or for any contract related questions, email passprograms@rideuta.com or call your UTA Sales Representative.
- To add more passes or renew contract:** To renew contract or increase your contract limit please login to UTA ECO Pass Renewal using the same username and password that you created for your online contract renewal in January. NOTE: if you cannot remember your username and password, you can reset it using the "Forgot your Username/Password" links on the bottom right hand corner of the login screen. (*Email must match a designated transit coordinator listed in the contract). Here is the link to the ECO Self Service Portal User Guide [UTA ECO Pass Renewal](#).
- EFC Operations:** For card activations, deactivations, card replacement and other EFC web site instructions please click on the link below: User Guide: [Transit Coordinator Users Guide](#).
- Reduced Fare applications:** For tap validation issues please email [EFCX Operations](#).

At the bottom left of the page, it says '© Utah Transit Authority 2022'. At the top right, there is a user profile section with the email 'reducedfares@gmail.com' and a 'Sign Out' link.

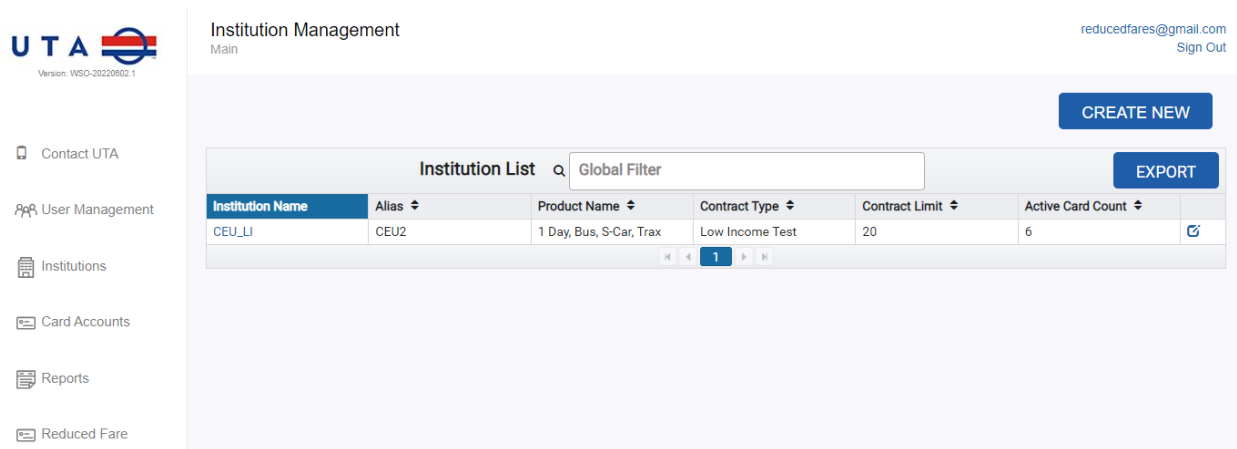
INSTITUTIONS

View Contract Information

After logging into the web interface, an institution admin, institution rep, or human services rep may view contract information. Click *Institutions* on the left-hand navigation bar and the list of institution(s) that the user is associated with will be displayed.

The row displays details of the contract - Product Name, Contract Type, Contract Limit and Active Card Count.

Click on the **Institution Name** or **Edit** button  to view the details associated with the institution account. (You can only see the institutions you have access to.)



The screenshot shows the 'Institution Management' interface. On the left is a navigation menu with options: Contact UTA, User Management, Institutions, Card Accounts, Reports, and Reduced Fare. The main content area is titled 'Institution Management' and includes a 'Main' link, a user email 'reducedfares@gmail.com', and a 'Sign Out' link. A 'CREATE NEW' button is at the top right. Below it is a table titled 'Institution List' with a 'Global Filter' search box and an 'EXPORT' button. The table has columns for Institution Name, Alias, Product Name, Contract Type, Contract Limit, and Active Card Count. The first row shows 'CEU_LI' with alias 'CEU2', product '1 Day, Bus, S-Car, Trax', contract type 'Low Income Test', limit '20', and 6 active cards. A blue button with the number '1' is visible below the table.

Institution Name	Alias	Product Name	Contract Type	Contract Limit	Active Card Count
CEU_LI	CEU2	1 Day, Bus, S-Car, Trax	Low Income Test	20	6

To view a copy of the institution's record of cards, click on the button displaying the number of **active cards** ¹. This view includes an **EXPORT** button to download the file for further analysis. Please note that while the button number is only active cards, the exported file includes all cards - both *active* and *inactive*.



The screenshot shows the 'Billing Contact Information' form within the 'Institution Management' interface. The page title is 'Institution Management' and the sub-header is 'Edit Institution'. The user email is 'InstAdmin@riciuta.com' and there is a 'Sign Out' link. The form includes fields for First Name, Middle Initial, Last Name, Email, and Phone Number. There are also fields for Address (Address Line 1, 2, 3, City, UT, Zip/Postal Code) and a 'User Reps' dropdown menu. A blue button labeled '9 CARDS' is located at the top right of the form area, with a red box containing the number '1' next to it.

USER MANAGEMENT

Please contact UTA (using the EFCX Operations link in Contact UTA tab) to request changes (add or remove) to any users in your institution.

Change your own password

To change your personal password click your institution email at the top right of the screen, which displays the **Manage your account** form. Select **PASSWORD** and follow the criteria below for a strong password.

The screenshot shows a 'Manage your account' interface with a sidebar menu where 'Password' is selected. The main content area is titled 'Change password' and contains three input fields: 'Current Password', 'New Password', and 'Confirm new password'. Below these fields is an 'Update password' button.

Change password

- The new password must be at least 8 characters long and contain at least 1 digit and 1 non alphanumeric character.
- The new password and confirmation password do not match.

CARD ACCOUNTS MANAGEMENT

Card Lookup

After logging into the web interface, a transit coordinator may look up card information. First click *Card Accounts* on the left-hand navigation bar, enter the face number for the card, and click **GO!**

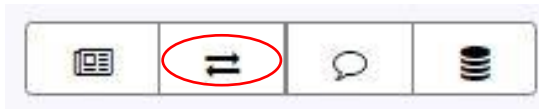
The screenshot displays the 'Card Account Management' web interface. On the left is a navigation menu with 'Card Accounts' selected. The main area has a search bar for 'Face Number' with a 'GO!' button and an 'ADVANCED' button. Below the search bar is a table with columns: UID, Face Number, Institution, Product, Proper, Start Date, End Date, and Active. The table shows one row with the number '1' in the 'Active' column.

To view card details, click the **UID** number or **Edit button**  on the far-right edge of the row of the card account you wish to view.



Card Replacement

Transit coordinators can easily replace cards that are reported lost, stolen or damaged. Transit coordinators perform card replacements in the *Card Account Management* feature by first looking up the lost card then clicking the card replacement button near the top-right corner of page.



In the dialog box, enter the *New Face Number* of the card being replaced, click inside the *New Card UID* box (the UID associated with the face number will appear), enter *Reason* and click **SAVE**. The replacement function automatically activates the valid replacement card (transferring the subscription and other information) and deactivates the replaced card. To check that the replacement card is active and the replaced card is inactive, click *Card Accounts* on the left-hand navigation bar. An institution using its own media may enter the new card face number, then input the UID by scanning the new card with an RF reader.

Enter the new card information

New Face Number:

New Card UID:

Reason:

Save Cancel

Comment

Transit coordinators may record notes for a card using the *Comment* button. Clicking the *Comment* button reveals this simple form. Click **OK** and the entry is saved and stored with the *Card Account Log* in the Action Reason column (see below).

Enter your comment below

Comment

Test 2/1-1155

Ok Cancel

REPORTS

Action History Report

All actions on card accounts (Activate, Deactivate, Replaced, Supersedes) are logged by the system. Click *Reports* on the left-hand navigation bar to see the list of available reports.



1. Click on *Action History Report*.
2. Enter the *Institution Name* (**the user's institution**).
3. *Select Actions* provides further filtering aids.
4. *Select Date Range*.
5. Click the **SHOW RESULTS** button for results.
6. Click **EXPORT** to view the results in Excel.

Aggregate Ridership Report

The Aggregate Ridership Report provides a ridership history for cards registered with your institution. Click *Reports* on the left-hand navigation bar to see the list of available reports.

1. Click on *Aggregate Ridership Report*.
2. Enter the *Institution Name (the user's institution)*.
3. *Type of Report Results* select either Service or Card.
4. *Select Date Range*.
5. Click the **SHOW RESULTS** button for results
6. Click **EXPORT** to view the results in Excel.



Specialized report filtered by Card

Specialized report filtered by Service

UTA
Version: WSC-20200301.1

Reports
Aggregate Ridership Report
InstAdmin@rideuta.com
Sign Out

Contact UTA
User Management
Institutions
Card Accounts
Bulk Imports
Reports

Select Criteria

Select Date Range
Start Date: 02/10/2020
End Date: 03/10/2020
Please contact UTA for data prior to 1/1/2019.

Select Type of Report Results
 Service Card
 Select Service Type in Report

Select an Institution

SHOW RESULTS

Ridership Report by Service Types

Service Type	Number of Trips
No records found	

Total Trips... 0

EXPORT
EXIT

UTA Web Interface Quick Start Guide

1. UTA Partner Web Site Login

Go to: www.tap2rideuta.com

- Enter your email address as the User Name
- Enter your password and click 'Log in'

2. Search Card Accounts

Click *Card Accounts* on the left-hand navigation bar.

UTA
Version: AMP-20190811.2

Card Account Management
Main

Contact UTA
User Management
Institutions
Card Accounts
Bulk Imports
Reports

Search for Face Number

Face Number

GO! ADVANCED

UID	Face Number	Institution	Product	Properties
1				

Type in the face number for the card to be found and click **GO!**

3. Run Reports

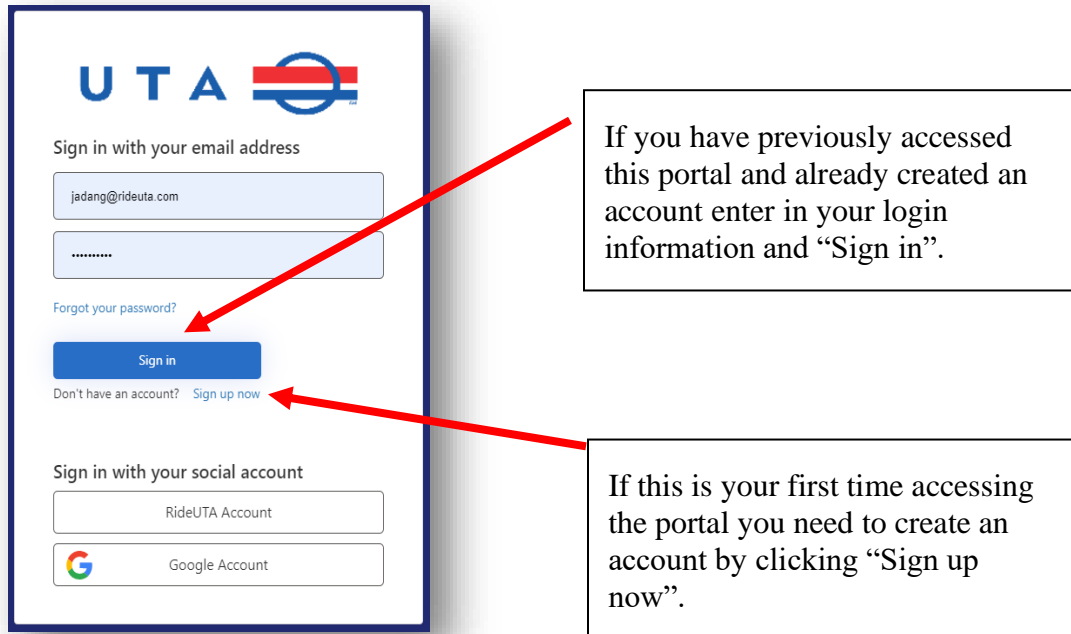
Click *Reports* on the left-hand navigation bar. Two reports are available.

To view the aggregate ridership activities for your institution, select Aggregate Ridership Report. Enter your selection criteria and click **SHOW RESULTS**. Use the **EXPORT** button to export results to a CSV file.

To view an audit trail of activations and deactivations performed using the UTA Partner Web Site, select the Action History Report. Enter your date selections and click **SHOW RESULTS**. Use the **EXPORT** button to export results to a CSV file.

Reduced Fare 3rd Party Approval Process

- Go to website: Reducedfare.com (link in Contact UTA tab) or select from left margin of EFCX

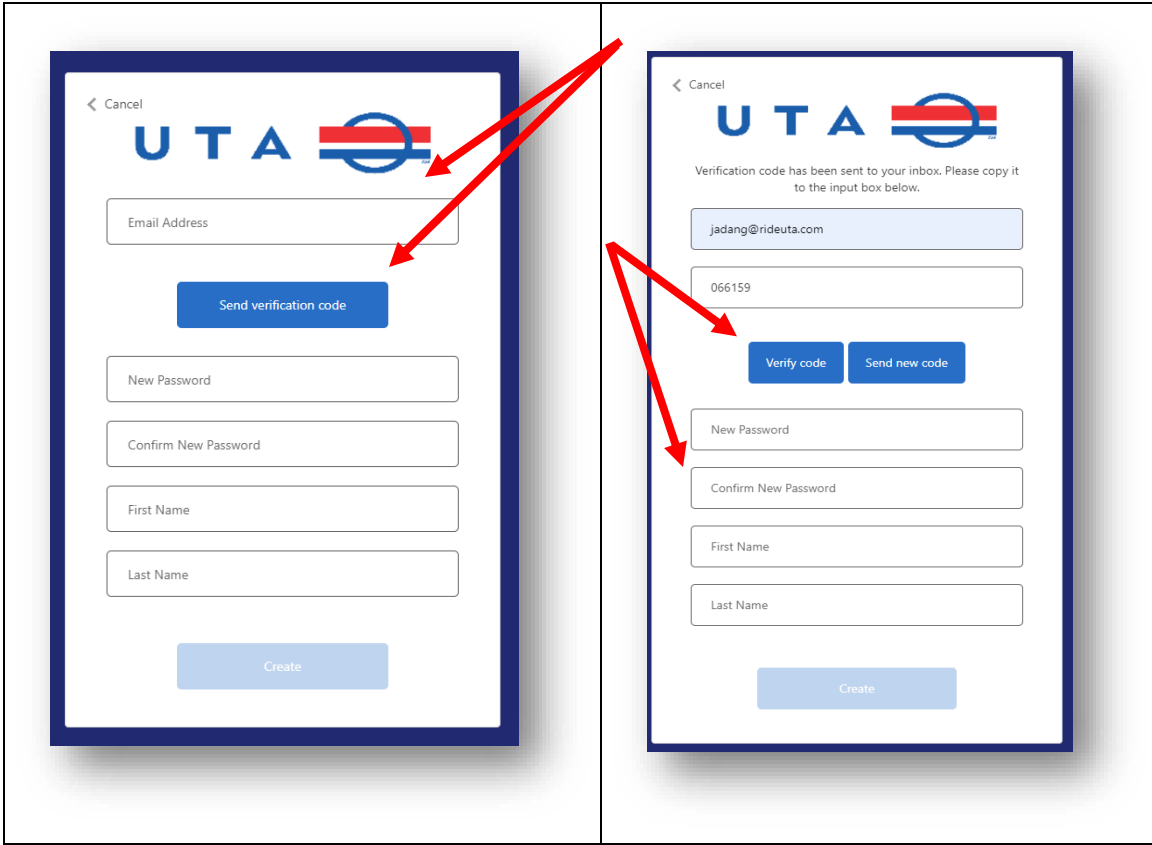


The screenshot shows the UTA login page. At the top is the UTA logo. Below it, the text "Sign in with your email address" is followed by two input fields: one for the email address (containing "jadang@rideuta.com") and one for the password (containing "....."). Below the password field is a link "Forgot your password?". A blue "Sign in" button is positioned below the "Forgot your password?" link. Below the "Sign in" button is the text "Don't have an account? Sign up now". Below this is the section "Sign in with your social account", which includes two buttons: "RideUTA Account" and "Google Account".

Two callout boxes with red arrows pointing to the "Sign in" button and the "Sign up now" link provide instructions:

- Top Callout:** If you have previously accessed this portal and already created an account enter in your login information and "Sign in".
- Bottom Callout:** If this is your first time accessing the portal you need to create an account by clicking "Sign up now".

- To Create an account click "Sign up now."
- First enter in the same address used to access EFC Partner Portal, then click "Send verification code."
- Enter code that was emailed to you and click "Verify code."
 - Once you enter in that code you will be allowed to create a new password.



- On the Home page fill out required fields on behalf of the qualified applicant:
 - First Name
 - Last Name
 - Date of Birth

Applicant Information

Applicant First Name: <input type="text" value="Jason"/>	+Applicant Middle Initial: <input type="text"/>	Applicant Last Name: <input type="text" value="Dang"/>	+Suffix: <input type="text"/>
+Applicant Phone Number <input type="text"/>	+Applicant Email: <input type="text"/>	Institution Email: <input type="text" value="JaDang@rideuta.com"/>	

Birth Date:
Year: Month: Day:

+ Field NOT required

I verify that the application I am submitting on behalf of this applicant, meets the criteria set forth by UTA to qualify for a Reduced Fare FAREPAY card (Applicant must be enrolled in a low-income assistance program and/or has income at or below 150% of the U.S. Federal Poverty Guideline). Additional information can be found at <https://rideuta.com/Fares-And-Passes/Reduced-Fare/Do-You-Qualify>

- Include Applicant phone number and email if available.

Applicant Information

Applicant First Name: +Applicant Middle Initial: Applicant Last Name: +Suffix:

+Applicant Phone Number: +Applicant Email: Institution Email:

Birth Date:
Year: Month: Day:

+ Field NOT required

I verify that the application I am submitting on behalf of this applicant, meets the criteria set forth by UTA to qualify for a Reduced Fare FAREPAY card (Applicant must be enrolled in a low-income assistance program and/or has income at or below 150% of the U.S. Federal Poverty Guideline). Additional information can be found at <https://rideuta.com/Fares-And-Passes/Reduced-Fare/Do-You-Qualify>

- Check verification box and click “Next.”

Applicant Information

Applicant First Name: +Applicant Middle Initial: Applicant Last Name: +Suffix:

+Applicant Phone Number: +Applicant Email: Institution Email:

Birth Date:
Year: Month: Day:

+ Field NOT required

I verify that the application I am submitting on behalf of this applicant, meets the criteria set forth by UTA to qualify for a Reduced Fare FAREPAY card (Applicant must be enrolled in a low-income assistance program and/or has income at or below 150% of the U.S. Federal Poverty Guideline). Additional information can be found at <https://rideuta.com/Fares-And-Passes/Reduced-Fare/Do-You-Qualify>

- Review Application – if information is correct click “Submit.”

Review Application

Applicants may pick up their FAREPAY card from any UTA customer service location. For card pick up, applicants must bring official identification containing their name and it must match the application.

Applicants will be required to take a photo at a UTA customer service location to be placed on their Reduced Fare FAREPAY Card. For any questions or feedback please contact UTA Fares Department directly at (801) 287-FARE(3273) or reducedfares@rideuta.com.

[Click here for a list of UTA Customer Service Locations](#)

Please review your application

Name:	Jason Dang
Phone Number:	444-444-4444
Applicant Email Address:	asdf@gmail.com
Institution Email Address:	JaDang@rideuta.com
Birth Date:	02/01/1902

- Once you submit you can search all applicants in the “Client Portal”.

- You can search by First or Last Name or Expiration date.

Client Portal

REMOVE	FIRST NAME	LAST NAME	BIRTH DATE	EXPIRE DATE	RENEW	MAIL CARD
Remove	Jason	Dang	03/01/1914	N/A	Renew	Mail Card
Remove	Jason	Dang	02/01/1902	N/A	Renew	Mail Card
Remove	Jason	Dang	03/01/1904	N/A	Renew	Mail Card
Remove	Jason	Dang	02/01/1902	N/A	Renew	Mail Card
Remove	Jason	Dang	02/01/1904	N/A	Renew	Mail Card
Remove	Jason	Dang	03/01/1905	N/A	Renew	Mail Card
Remove	Jason	Dang	02/01/1903	N/A	Renew	Mail Card


- At this point Client can be sent to a customer service center to have picture taken and their card issued.

More steps are needed if the client would prefer to have the card mailed.

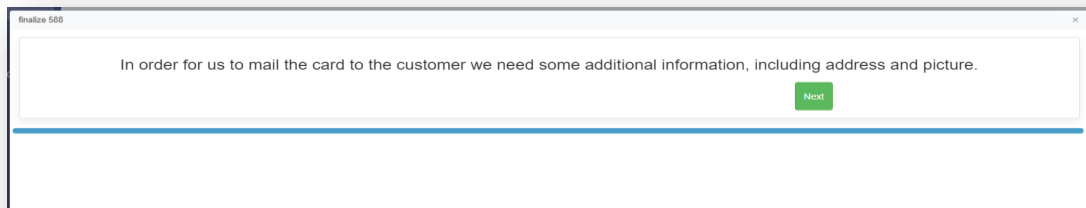
- Click “Mail Card” this will require you to add a mailing address and upload a picture.
 - Note* if Client doesn’t have a mailing address you can mail to your organization and the Client can pick it up from your location.

Client Portal

REMOVE	FIRST NAME	LAST NAME	BIRTH DATE	EXPIRE DATE	RENEW	MAIL CARD
Remove	Jason O	Dang	02/01/1903	N/A	Renew	Mail Card
Remove	Jason Y	Dang	03/01/1905	N/A	Renew	Mail Card
Remove	Jason S	Dang	02/01/1904	N/A	Renew	Mail Card
Remove	Jason	Dang	02/01/1902	N/A	Renew	Mail Card
Remove	Jason B	Dang	03/01/1904	N/A	Renew	Mail Card
Remove	Jason	Dang	02/01/1902	N/A	Renew	Mail Card



- Click “Next”.



- Add a picture by either dragging or clicking in top box to choose a file. You can also remove selected picture before submitting by clicking “remove”.

finalize 588

Upload photo

Drag or click here to choose files... (This may take a few minutes.)

Pups.webp Remove

Photo Guidelines:

- Forward facing photo with full face.
- No hats, face coverings, sunglasses, filters.
- Neutral Background (white, light gray).

Mailing Information

Mailing Address:

1234 fake st

City: SLC State: Utah Zip Code: 84111

Back Next

- Add Mailing Address and click “Next”.

finalize 588

Upload photo

Drag or click here to choose files... (This may take a few minutes.)

Pups.webp Remove

Photo Guidelines:

- Forward facing photo with full face.
- No hats, face coverings, sunglasses, filters.
- Neutral Background (white, light gray).

Mailing Information

Mailing Address:

1234 fake st

City: SLC State: Utah Zip Code: 84111

Back Next


- Verify the name and address is the one you want then click “Submit”.
 - Note mailing the card will take up to 7-10 business days. For any questions you can contact the UTA Fares Department at 801-287-FARE (3273) or email reducedfares@rideuta.com.

finalize 594

A Reduced Fare FAREPAY card will be processed and sent to the address provided below within the next 7-10 business days. For any questions or feedback, please contact UTA Fares Department directly at (801) 287-FARE(3273) or reducedfares@rideuta.com.

Please review your application

Name:	Jason Dang
Address:	1234 fake st, SLC, Utah, 84111

[Back](#)  [Submit](#)

- UTA will process the request and mail their card within 10 business days. “Mailed Card” button will change from blue to black and read “Card Mailed”.

Client Portal

REMOVE	FIRST NAME =	LAST NAME =	BIRTH DATE =	EXPIRE DATE =	RENEW	MAIL CARD
Remove	Jason B	Dang	03/01/1904	N/A	Renew	Card Mailed
Remove	Jason O	Dang	02/01/1903	N/A	Renew	Card Mailed
Remove	Jason O	Dang	02/01/1903	N/A	Renew	Mail Card
Remove	Jason O	Dang	02/01/1903	N/A	Renew	Mail Card
Remove	Jason O	Dang	02/01/1903	N/A	Renew	Mail Card

- Approved applications are good for one (1) year and will need to be renewed each year.
- When a card is available to be renewed the “Renew” button will be green instead of gray.

Client Portal

REMOVE	FIRST NAME =	LAST NAME =	BIRTH DATE =	EXPIRE DATE =	RENEW	MAIL CARD
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Remove	Beattie	Juice	07/25/1946	08/10/2022	Renew	Card Mailed
Remove	Rico a	Porter	09/01/1911	08/10/2022	Renew	Card Mailed
Remove	Sammy	Sosa	07/01/1916	N/A	Renew	Card Mailed
Remove	Happy	Jones	09/06/1964	N/A	Renew	Card Mailed
Remove	Johnny	Rocket	03/01/1918	08/10/2022	Renew	Card Mailed
Remove	Grand	Canyon	04/27/1990	N/A	Renew	Mail Card
Remove					Renew	

- Click “Renew” and it will ask if you are sure you want to renew the application

Client Portal

REMOVE	FIRST NAME =	LAST NAME =	BIRTH DATE =	EXPIRE DATE =	RENEW	MAIL CARD
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Remove	Beattie	Juice	07/25/1946	08/10/2022	Renew	Card Mailed
Remove				08/10/2022	Renew	Card Mailed
Remove				N/A	Renew	Card Mailed
Remove				N/A	Renew	Card Mailed
Remove	Johnny	Rocket	03/01/1918	08/10/2022	Renew	Card Mailed
Remove	Grand	Canyon	04/27/1990	N/A	Renew	Mail Card
Remove					Renew	

Renew Application ×

Are you sure you want to renew this application?

Yes
Cancel

- Click “Yes”
- This will change the expiration date to one year from today’s date and the “Renew” button will turn from green to gray

Client Portal

REMOVE	FIRST NAME =	LAST NAME =	BIRTH DATE =	EXPIRE DATE =	RENEW	MAIL CARD
<input type="text"/>	<input type="text"/>			<input type="text"/>		
Remove	Beatle	Juice	07/25/1946	07/21/2023	Renew	Card Mailed
Remove	Rico a	Porter	09/01/1911	08/10/2022	Renew	Card Mailed
Remove	Sammy	Sosa	07/01/1916	N/A	Renew	Card Mailed
Remove	Happy	Jones	09/06/1964	N/A	Renew	Card Mailed
Remove	Johhny	Rocket	03/01/1918	08/10/2022	Renew	Card Mailed

- **OPTIONAL: Removing Client Application**
 - This optional function can be utilized if the Client is no longer participating in your programs, or if they no longer need assistance. UTA will keep record of any “Removed” applications
- To remove an application click on “Remove” and then select “Yes” to confirm you want to delete the application.
- Client Application will no longer be visible or searchable in the Client Portal. However, UTA will still keep record of any “Removed” applications.

Remove	Jason	Dang	03/01/1914
Remove	Jason	Dang	02/01/1902
Remove	Jason	Dang	03/01/1904
Remove	Jason	Dang	03/01/1903
Remove	Jason	Dang	03/01/1903
Remove	Jason	Dang	02/01/1903

Delete Application

Are you sure you want to delete this application?

Yes Cancel