

# New ORCA Business Account Frequently Asked Questions

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## New ORCA Launch & Transition

### When is the launch of the New ORCA system?

The launch date is May 16, 2022.

### How will the transition work? Will there be a “blackout period”?

The transition will occur over a weekend during which the Business Account website ([orcacard.biz](http://orcacard.biz)) will not be available for use. ORCA card readers will be out of service during the transition weekend so fares will not be charged on the ORCA transit agencies: Sound Transit, King County Metro, Kitsap Transit, Everett Transit, Community Transit and Pierce Transit. The only exception is that Washington State Ferries will continue to collect fares.

- **The current Business Account Website ([orcacard.biz](http://orcacard.biz)) will be deactivated on May 12** at close of business, in preparation for launch. Starting May 16, you will use [myORCA.com](http://myORCA.com).
- **Effective May 16, the cost per ORCA card will be reduced from \$5 to \$3.** If possible, we suggest you wait until May 16 to place your next card order.
- **Prior to deactivation of [orcacard.biz](http://orcacard.biz), card orders will be limited** to allow time for ORCA to complete card orders.
  - As of May 2, the maximum order will be 200 cards.
  - As of May 9, the maximum order will be 10 cards.
- **You may continue to add value to existing cards at [orcacard.biz](http://orcacard.biz) until close of business on May 12 if you pay by credit card.**

### Will existing cards be automatically transferred over to the new website?

Yes, your account, primary contact, cards, and any existing groups will be automatically migrated to the new website. All you need to do is update your primary contact email address (Business Account Contact 1) in the existing ORCA Business website.

### What will happen to work orders that have not yet been completed (e.g., card holder has not yet tapped their card)?

Actions taken to block, unblock, disassociate, or move cards between groups will migrate as completed. For example, a card that was blocked in December 2021 but never tapped within 60 days to complete the block, will still migrate over as blocked (known as “lock” in the new system).

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## Account Administrators

### What do I need to do before the launch of new ORCA?

Update your primary contact (Business Account Contact 1) information in the existing ORCA Business website. Log into [orcacard.biz](http://orcacard.biz) today and update your email address. This will ensure you receive the email prompt to reset your password in the new ORCA system. The email will be sent on the launch day. The primary contact will have super admin permissions and your email address will be your username.

### Can a business account have more than one super admin?

Yes, but at launch, only the current primary contact will be the super admin. That person can then log into [myORCA.com](http://myORCA.com) and add more admins or super admins if needed.

### What is the difference between a super admin vs an admin?

A super admin can add additional admins to the Business Account and view and update the Account Settings.

### Will we need to have separate logins for Choice and Passport accounts?

Yes, you will need a unique email for each business account. This also applies if you manage more than one ORCA Passport or Choice account. If you currently use the same email address to manage multiple accounts, you will need to use another unique email for the other business accounts you manage.

## Card Management

### Do I need to replace all my account's legacy blue cards with the new black ORCA cards?

No, legacy blue cards will continue to work in the new system. The only functionality that legacy blue cards will not have is users will not be able to use the new retail network to add funds or passes to their cards. If you have card holders who use the retail network to purchase products, those users will need the new black ORCA cards. Legacy blue card holders will still be able to purchase products using [myORCA.com](http://myORCA.com) website or mobile app, calling customer service or using a ticket vending machine.

### When will the new black ORCA cards be available?

We don't have a specific date yet, but likely late summer 2022. New cards will be released once all the old ORCA readers are replaced. However, the legacy blue cards will continue to work and there is no need to replace them at this time. The cards will cost \$3.00 each. The new card serial numbers will be 19 numbers long in addition to a 3-digit security code.

### Do you still have to pay \$0.50 extra for a card logo?

There will no longer be a fee for card logos.

### Will names be able to be associated with issued cards?

Yes. This is a new, optional feature where you can add participant names to cards.

### We have some blank legacy blue cards that have never been used. Can we still assign and use those cards?

Yes, you can. The blue cards will remain active before, during and after the transition to the new ORCA system.

### How do we get a replacement ORCA card?

You'll select the card, click Manage, click Replace card, then follow the prompts to transfer products to a replacement card. If you have extra ORCA cards in stock, you can transfer the products to an existing card, or order a new replacement card from the website.

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## Adding Products to Cards

### Can you add E-purse value and passes at the same time?

Yes.

### How quickly will passes, products and e-purse be loaded onto ORCA cards?

With the new system, all products and e-purse value will load immediately. Cards will no longer need to be tapped within 60 days to activate or view balance online. The balance will automatically update on the website.

During the transition, when we are replacing old equipment with the new equipment, there may be a delay in when card holder balance is updated. The transition will last 2-3 months.

### Is there a monthly deadline for pass purchases? Is there any prorating?

Passes valid for the current month are available for purchase from the 1<sup>st</sup> day of the prior month through the 14th of the current month. There is no prorating.

### Can we set up autoload for all products?

Yes, you can set up autoload for both monthly passes and E-purse. To set up autoload for passes, the pass will need to be purchased one time to be available for autoload.

### Will there still be an option to purchase ferry passes?

Yes, ferry passes can still be purchased. Like all other passes, they will now load onto the cards in real-time, without the overnight delay.

## Payment Types

### What payment methods will be accepted in the new ORCA system for Business Choice and Passport accounts?

Business customers will be able to pay via credit card (Visa, Mastercard, American Express and Discover), checks (using the invoice option), or ACH.

### Will credit card payment information be transferred over to our new ORCA account?

No, you will need to create a payment method by entering your credit card information in the new system.

### Can business customers split payments?

If you have more than one payment method set up, you can select the option to pay for an order using split payment.

## E-Purse

### Does E-purse stay active in the new system even if the card is not tapped within 60 days?

Yes, all products and e-purse will be loaded in real time, so there will no longer be expired work orders or a waiting period.

### Will expired E-purse value migrate over to the new system?

No. Expired E-purse value will not migrate to the new system. E-purse expires if the ORCA card is not tapped within 60 days of the value being loaded. Please reach out to your account rep or the Business Lead Agent if this applies to your cards.

### What is the dollar limit for e-purse?

The limit will increase to \$400. If funds are already on a card, you cannot add more than \$400.

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## **Will we be able to block participants from adding funds to their E-purse or products in the new system?**

No, you will not be able to stop an individual from adding E-purse or products to their card.

## **Pre-Tax**

### **What is the pre-tax option?**

Employers who load value using pre-tax deductions from employees' paychecks may select the pre-tax option so the funds can't be transferred to another card.

### **How do you designate that E-purse purchase is pre-tax?**

There is a box you can check in your Shopping cart at checkout when adding the value to the card. The Pre-tax setting will need to be enabled by your Lead Agency first. You may view whether it is enabled by selecting Account settings under Administration. Contact your Lead Agency for assistance if it is not enabled.

### **Can we maintain a mix of pre-tax and non-pre-tax on the same card? If so, which funds get spent down first, the pre-tax or regular funds?**

Yes, cards can be loaded with pre-tax and non-pre-tax funds on the same card. The \$400 purse limit will apply for the combined total of the two. Pre-tax funds get spent down first if a card has a mix of both pre-tax and non-pre-tax E-purse.

## **Bulk Actions**

The new site has 17 different types of bulk actions available for:

- Managing Participants (Add Participants, Update Participants, Remove Participants, Add cards to participants)
- Manage Cards (Lock Cards, Unlock Cards, Add Cards, Remove Cards)
- Manage Products, Passes and Autoloads (Add Money and/or Passes, Add multiple products to multiple cards, Add Autoloads, Edit autoloads, Remove Autoloads, Pause Autoloads, Resume Autoload)
- Manage Groups (Add participants to group, Remove participants from group)

For some bulk actions, a unique identifier is needed for each card. This can be the card number, an employee ID or something else. Products can be ordered without a unique identifier.

### **Will there be a .csv import option like on the current ORCA website?**

Yes, you will be able to import a .csv file.

### **Can you add participant names in bulk to existing cards?** Yes, once the existing cards on your account migrate to the new site at launch, you will be able to use a .csv file in bulk actions to add participants to existing cards.

### **Can I order cards in bulk for our employees?**

Yes, you can still order cards in bulk.

## **Groups**

### **Can we create card groups?**

Your existing card groups will migrate over at launch, and you will be able to create new groups. Another new feature is to "add participants," meaning you can add the name or unique identifier of those you have issued cards to on the website.

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### **Will existing card groups be migrated over to the new system?**

Yes, existing card groups will be migrated over to the new website, even if those groups are blocked or suspended in the current system.

## **Linking/Unlinking Cards**

### **What is the process for disassociating a card from the business account? For example, if a participant leaves the organization but wants to keep the card for personal use because they have funds, passes or products on it.**

Existing cards will migrate to your [myORCA.com](http://myORCA.com) account as "Linked". You may Remove a card (also referred to as unlinking) from your account to allow the employee to keep the card for personal use.

Unlinking a card will remove the Passport product and will leave any E-purse balance or passes that have already been loaded, i.e. a monthly pass.

### **Will I be able to associate an employee purchased ORCA card to the business account?**

Yes, an employee's existing card can be linked to the business account. The business will have load only access to the card. If the employee loses their card, the employee will be responsible for requesting a card block or replacement.

## **Locking/Unlocking Cards**

Lock and Unlock cards are the same as blocking or unblocking cards in the legacy ORCA system.

### **If we transfer funds from one card to another, does it permanently "close" the card in the new system?**

No, the new system will allow you to transfer all or part of E-purse funds easily between cards without closing the card. However, replacing a card will permanently close the card being replaced. The transfer balance feature will not be available at the May 16<sup>th</sup> launch, but will be added to the system at a near future date. If you need support to do this, please contact your business account rep for assistance.

### **Once a card is locked, can you unlock it?**

Yes, and this will happen in real time.

### **Is locking a card the same as de-activating or blocking a card?**

Yes, you will also have the option to unlock a card.

## **Mobile App**

### **Will the mobile app serve any benefit to our employees who have cards loaded with a business product?**

The mobile app may be useful if an employee creates an account, registers the card and wishes to add additional products or view their card transaction history. Virtual cards will be available at a later date in the mobile app.

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