



# ORCA Resource Guide for Choice and Passport

This is a user guide for ORCA Business Passport and ORCA Business Choice customers managing their account at [myORCA.com](https://myORCA.com).



Updated March 2026

# ORCA Business Program User Guide

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# 1. Introduction

## Glossary and definitions

Term	Definition
<b>Add Money</b>	Action to increase the E-purse balance for card transactions.
<b>Add Passes</b>	Action to add passes to a card (e.g., “Regional Business Passport”)
<b>Agency Pass</b>	A pass offering access to services from a specific transit agency.
<b>Assign Participant</b>	This button the Manage Cards page allows you to link an unconnected Participant to a card.
<b>Autoloads</b>	A function that allows E-purse and passes to be loaded onto cards using a set timeframe or E-purse balance threshold so that product ordering runs automatically.
<b>Bulk Jobs</b>	A method to link, unlink, lock, and unlock cards; to create, modify, and delete Participants; to add or remove Participants from Groups; to create, modify, or delete Autoloads, and to load E-purse and passes to cards.
<b>Business Choice</b>	A Business program designed around flexibility. Accounts set as Business Choice can order any products that suit their cardholders best. Business Choice allows unique and custom purchasing for each card on an as-needed basis.
<b>Business Passport</b>	A Business program designed around comprehensive coverage. With <b>Area Passport</b> , a Business must have between 5 – 499 cardholders. With <b>Per-Trip Passport</b> , a Business must have over 500 cardholders combined across all their worksites. Passport contracts are designed to allow cardholders to ride on most Puget Sound services that take ORCA payment.
<b>Card Serial Number (CSN)</b>	The 19-digit serial number on the back of the black ORCA card. Blue ORCA cards have 8 digits.
<b>Card Type</b>	<ul style="list-style-type: none"> <li>• “Physical cards” are standard, new, black ORCA cardstock</li> <li>• “Classic cards” are older, blue ORCA cardstock</li> <li>• “In Wallet” are digital cards</li> <li>• <b>Upcoming: Payment by physical or digital credit and debit cards in ORCA, stay tuned for more information</b></li> </ul>
<b>“Close Card” button</b>	The Business website action sends a Case to your Leadagent, requesting they close the card on your behalf. Card closure

	permanently removes the card from future usage. A closed card can be unlinked from the business account at any time. This action cannot be performed using Bulk Jobs. All product and E-purse must be refunded or transferred beforehand.
<b>Digital Card</b>	This is a term that refers to cards stored in digital wallets, such as Google Wallet. Only the mobile device owners have access to some features of the card. Businesses still retain ownership of any funds or passes they load. When a physical/plastic card is replaced with a digital card, it is considered “Converted” to digital.
<b>E-purse</b>	Electronic purse is the digital balance of funds on a card used for transit purchases.
<b>Fare Category</b>	There are five categories that match the types of cards one can have: standard Adult, LIFT low-income, Regional Reduced Fare Permit Senior, Regional Reduced Fare Permit Disabled, and Youth cards.
<b>Full Access</b>	Permission level for employer allowing complete management of the card, including loading funds, purchasing passes, and managing participant details.
<b>Groups</b>	Groups can be created to tie similar Participant and Card information together. Similarities can be based off Worksites (if your Business has more than one location or splits billing internally), similar products (a Group could be labeled “\$2.75 PugetPass” for all cardholders that order that product), or any other method of collecting cards into a unit that shares some similarity. Groups can then be used to conduct faster Bulk Jobs based on that similarity.
<b>Identifiers</b>	Unique codes used to assign cards to participants. Necessary to complete some Bulk Jobs.
<b>Load Only</b>	Permission level for employer allowing only the loading of funds or passes onto the card without access to full management features, including viewing usage history.
<b>“Lock”/“Unlock” buttons</b>	Temporarily disables the E-purse and passes associated with the card (e.g., for a lost card). Some cards may have a “Block” status that can only be Unblocked by your Business Leadagent.
<b>Manufacturing Number (MSN/MFG)</b>	These are the numbers that appears on the back of plastic ORCA cards and correspond with your packing slip when ordering plastic cards. These numbers are sequential, while Card Serial Numbers in the card order are randomized.

<b>ORCA “Product”</b>	“Product” is a catch-all term for anything that can be loaded directly to an ORCA card and used for fare payment. Examples include, but are not limited to, monthly or period pass, and E-purse.
<b>Ownership Flag</b>	This flag allows Businesses with a <i>Load Only</i> link to a card perform actions similar to a <i>Full Access</i> relationship. This flag is only used for Business Accounts.
<b>Participant</b>	An individual assigned to a card for transit use. This can include a first name, last name and email. Participants can be moved between cards, unlinked, and deleted.
<b>Pass</b>	A type of transit fare product offering access to services.
<b>Physical Card</b>	Physical ORCA card that has not been converted to a Digital ORCA card. You may also see references to “Classic card.”
<b>PugetPass</b>	Monthly pass available for unlimited rides on regional transit services. All ORCA monthly passes are set to a Calendar Month (8/1 – 8/31) instead of from the time of purchase (8/14 – 9/13, for example). PugetPasses cover all fares at or below the set fare value. E-purse may be necessary to cover higher fares.
<b>Regional Pass</b>	A pass providing access across multiple transit agencies in a region.
<b>Replaced card #</b>	This field will list a previous CSN that was lost, stolen, broken, etc. and had to be replaced with the CSN in the “Card #” column.
<b>“Remove” button</b>	Individual card action found on the Manage Cards page. Unlinks a card from the Business Account. Unlinking can result in Participants being removed from the card and Autoloads being deleted. This same action can be done in bulk.
<b>Super Admin</b>	Highest access level for managing all aspects of the Business Account. This permission set can create, edit and close other Admins.
<b>“Unlink Participant” button</b>	Individual card action. Detaches a participant from a card, making the card unassigned. This same action can be done in bulk.

## **Welcome to ORCA Choice and Passport Programs!**

This ORCA guide is designed to help you navigate and maximize the benefits of your ORCA Business account. From quick start guides to detailed steps on managing cards, participants, and bulk actions, our goal is to make your experience as smooth and efficient as possible. Dive in to discover everything you need to get started, manage your account, and support ORCA transit benefits for your organization.

## Quick start guide:

### 1. Visit the ORCA website:

1. [Sign up for/into your business account](#)

### 2. How to order cards:

#### Login:

- Sign in to your business account at [myORCA.com](http://myORCA.com).

#### Navigate to 'Cards':

- Select "Cards" in the top navigation bar.

#### Purchase cards – visit [“Purchase new cards” section](#) for greater details:

- Select "Purchase Cards."
- Enter the quantity of cards.
- Select the access type which is typically “Full Access” for Passport and “Full Access” or “Load Only” for Choice accounts.
- **Important:**
  - *If you are a Business Passport customer,* select “Add Money/Pass” and choose “Regional Business Passport” to add the unlimited ORCA pass on the cards.
  - Add money (E-purse) or passes as needed.
  - Visit the [“Add Product to ORCA Cards” section](#) for greater details
- Click "Add to Cart" and complete the payment.

### 3. Setting up your account:

#### Account information:

- Select "Administration" > "Account Settings."
- For Choice accounts, fill in your business details, contact information, and payment methods.

#### Updating/Changing passwords:

- Each admin can update their password under "My Profile" in the Administration dropdown.
- Super Admins can update passwords for other admins.

#### 4. Establishing different admins:

##### Manage admins:

- Select "Administration" > "Manage Admins."
- Add, edit, block, or remove admins as needed.

#### 5. Basic card management:

##### Manage cards:

- Go to "Cards" > "Manage Cards."
- View card details, [lock/unlock](#) cards, [unlink/remove cards](#), [Assign Participants](#), [unlink participants](#), or replace cards. or replace cards.
- Visit the [“Manage cards page” section](#) for greater details

##### Bulk actions:

- Use bulk actions for managing multiple cards at once (e.g., adding passes, locking cards).

#### 6. Running bulk jobs:

Visit the [Bulk Actions Tips and Tricks page](#) to learn more about how to conduct jobs.

##### Prepare your data:

Ensure you have a CSV file with the necessary information (e.g., card numbers, participant details).

##### Upload bulk job:

- Go to "Cards" > "Manage Cards."
- Select “Add multiple cards”
- Create a CSV file in the listed format and upload your CSV file.
- Review the uploaded data and press submit.

##### Execute bulk job:

- Follow the prompts to execute the bulk job (e.g., adding passes, updating participant info).

## **2. Account setup and administration**

### **Account setup**

For Choice customers:

1. Navigate to the website or open the app where you want to create an account.
2. Select "Sign Up"
3. Fill in the required fields:
  - Full Name
  - Email Address
4. Choose a strong and unique password. A strong password typically includes:
  - At least 8-12 characters
  - A mix of uppercase and lowercase letters
  - Numbers
  - Special characters (e.g., !, @, #, \$)
5. Review the terms and conditions.

For Passport customers, a representative will work with you to create your login.

### **Update/change passwords**

1. Log in to either business or personal account you want to update.
2. Navigate to the user profile.
3. Select "Need Help Signing In?"
4. Enter your current password for security verification.
5. Enter a new password that is strong and unique.
6. Click the Save button to save the changes.

### **Establishing different account admins**

Super Admins have the ability to add and remove administrators and access Account Settings, which include Business Account-level information (e.g. payment methods).

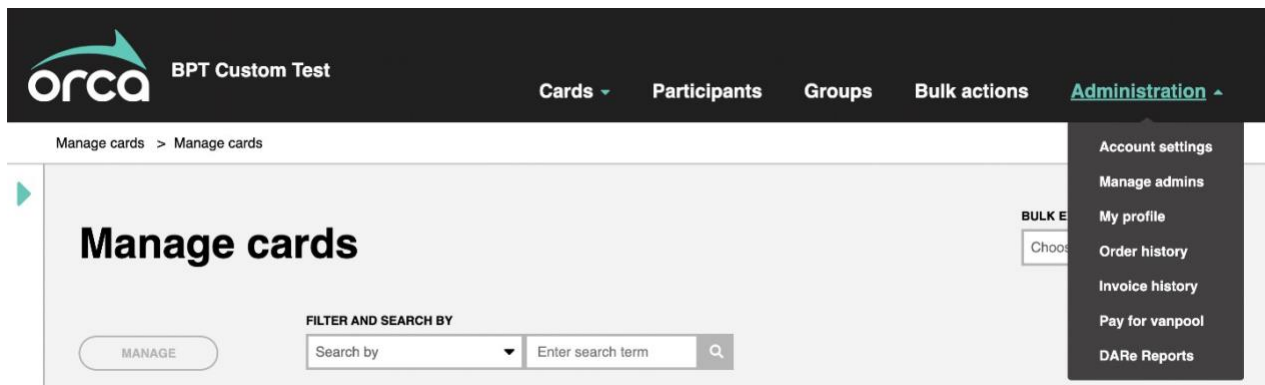
Both Admins and Super Admins share access to various website functionalities, such as ordering cards/products, managing cards, and performing bulk actions.

Each admin will have a unique username (email address) and password. All admins can update their own passwords or security questions by selecting "My Profile" from the Administration

dropdown. Super Admins can also update passwords and security questions on behalf of other admins if needed.

*Note: A user cannot use the same username (email) for multiple accounts. Users managing multiple Business Accounts will need a unique email address for each account. Please note this also applies to individual accounts. A Business domain email used for a personal ORCA account can no longer be used for a Business Account login. Contact your Leadagent for assistance.*

## Administration



To manage your Business Account, open the Administration drop-down menu and access the following options:

- **Account Settings**

Display details for the Business Account, including business name, Tax ID number, business contact, payment settings, billing and shipping addresses, and account permissions settings. You can add, edit, or delete a payment method or shipping address from this page. This page is only accessible to users with Super Admin permissions.

- **Manage Admins**

Displays a list of admins with login permissions to the Business Account (including the person signed in). You can add a new admin, or edit, block, or close an existing one. This page is only accessible to users with Super Admin permissions. Super Admin users are also capable of updating any account's password and security questions in the case of an account restriction or credential loss from another user.

- **My Profile**

Displays user information for the person signed into the site. Functions include updating user information, security questions, changing passwords, and notification preferences.

- **Order History**

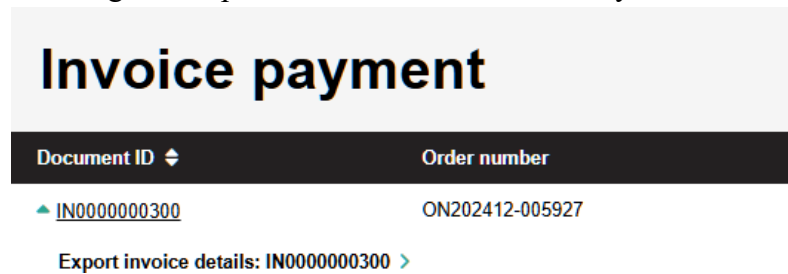
Displays all orders submitted by the business. Functions include viewing payment, date, time, and order number details; month and year filtering; and high-level exporting.

- **Order Details**

Each Order can be expanded to reveal a button “View order details”. This brings viewers to a page where more focused details about the specific order can be found like product information, Card Serial Number (CSN) details, CSN filtering, line-by-line exporting, and a “Copy Order” button that—with some monthly pass limitations—allows users to duplicate a previous order and add the exact products for the exact cards into the Shopping Cart.

- **Invoice Payment**

Includes orders where "invoice" is selected as the payment method. Some viewing features include Document ID, order number, date, various amount fields, and the Invoice payment date. Users may also download copies of Invoices and Credit Notes. Links to do so can be found by selecting the drop-down arrow tied to each entry.



The screenshot shows a table titled "Invoice payment". The table has two columns: "Document ID" and "Order number". The first row contains the values "IN0000000300" and "ON202412-005927". Below the table, there is a link that says "Export invoice details: IN0000000300 >".

Document ID	Order number
<a href="#">IN0000000300</a>	ON202412-005927

[Export invoice details: IN0000000300 >](#)

Some important things to know:

- “CN” in the “Document ID” column means “Credit Note” which means you have a credit on your account that you can apply to an Invoice to reduce what you owe.
- “IN” in the “Document ID” column means “Invoice Note” and is just a shorthand for “Invoice”.
- “Original Amount” refers to how much the Invoice or Credit Note was originally worth.
- “Amount paid” shows how much you have applied to an Invoice. This can be a combination of Credit Notes and Invoice payments applied.
- “Remaining balance” indicates how much you still owe.
- **Pay Now functionality**

You can pay your Invoices with credit card and ACH directly through the website. Any outstanding Invoices will have a “Pay Now” button in the “Date Paid” column. You can only apply one Invoice to a Shopping Cart at a time for payment. The column will display a date once you have settled all payments for the outstanding item. Credit card payments are limited to amounts under \$10,000.

- **Invoice History**

Records all of the Invoices and Credit Notes created in the system for your account over the last 36 months. Some Credit Notes will only appear here. Be sure to look for any “CN” items on this page with a “Remaining Balance” field that matches the “Original Amount” field.

The Invoice History page includes much of the same information listed on the “Invoice Payment” page, including the ability to download documents:



Document ID	Document date	Original amount
IN0000000301	12/17/2024	\$50.00

Export invoice details: IN0000000301

- **Pay for Vanpool**

Make vanpool fare payments for a single vanpool rider or a group of riders. Contact your Business Leadagent for more details.

*Note: This feature is primarily for Business Choice customers and does not apply to Business Passport accounts.*

### [3. Purchasing Cards, and Managing cards and participants](#)

**Cards (select from the dropdown):**

- **Manage Cards:** View card details, manage, or load cards.
- **Purchase Cards:** Buy new cards for your business account (see Section 4 for more details).

## Purchase new cards

To purchase new cards, follow these steps:

1. Select **Cards** from the top navigation bar and click **Purchase Cards**.
2. Enter or select the **Quantity**.
3. Choose an **Access Type** from the "Add to Business Profile as" dropdown:
  - Full Access
  - Load Only
  - Do Not Add

*Note: Select "Do Not Add" if you do not want the cards to be linked to your Business Account.*

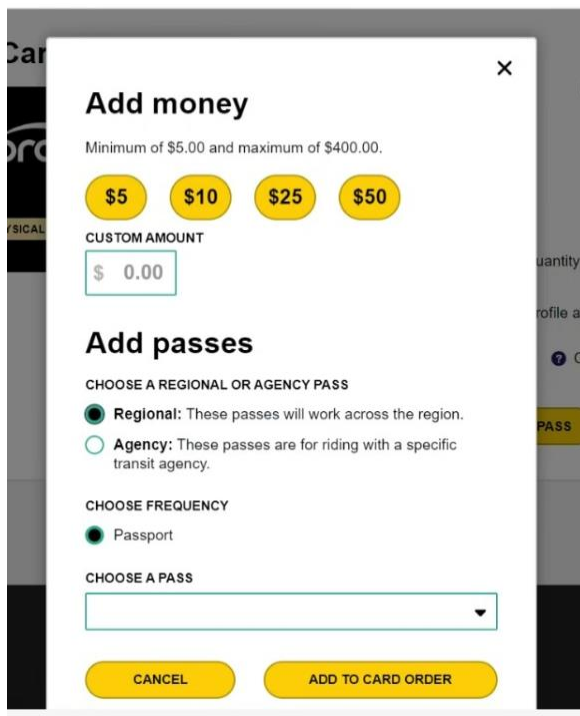
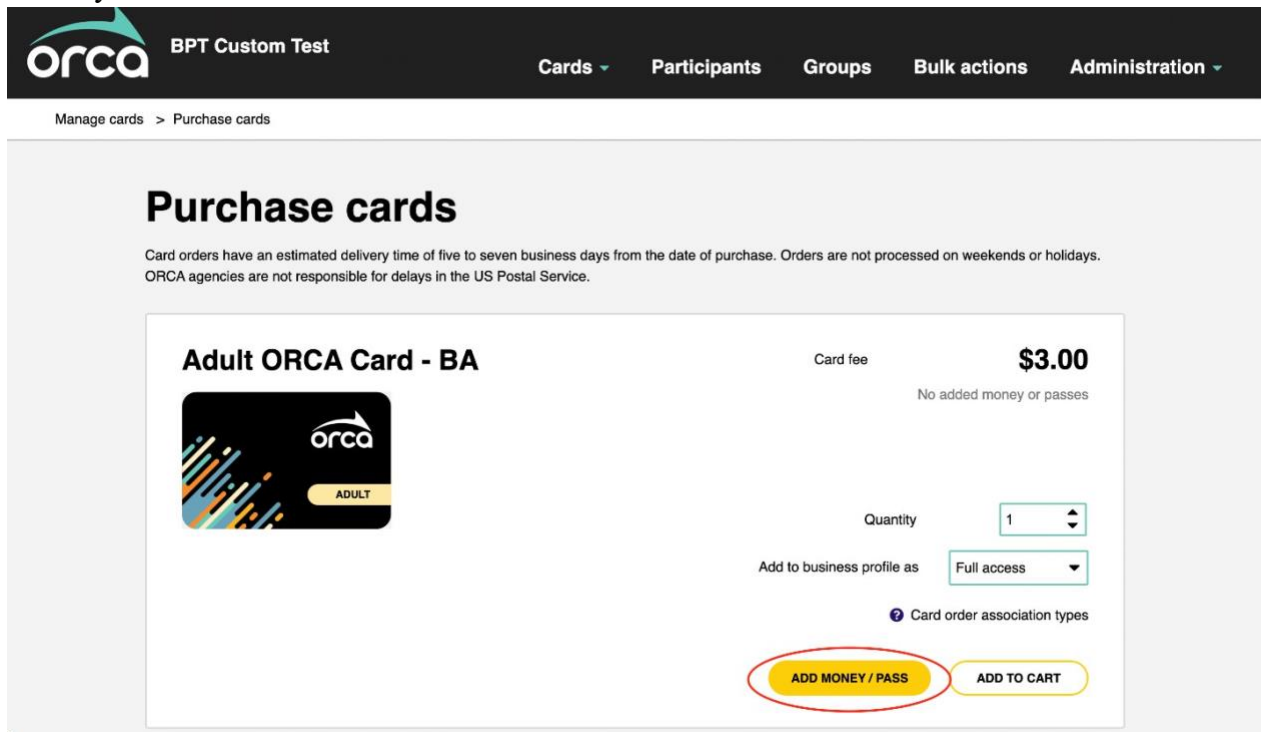
The Profile Access Type will depend on how your Business Account is set up. Please consult with your account representative or lead agent for more details.

- Generally, Passport Accounts should purchase Full Access cards.
- Choice Accounts may purchase Full Access or Load Only cards.

## Add Product to ORCA Cards

Proceed to the **Add Money/Pass** button to add products or passes. Do not proceed to **Add to Cart** unless you wish to purchase empty cards and plan to load products later.

Passport accounts [must add a Passport](#) product to the cards for them to work at the time of delivery.



Click **Add Money/Pass** to add funds or specific passes to the cards you're ordering.

- **Add Money:** Add E-purse funds to the cards. Enter or select the amount, then click **Add to Card Order**.
- **Add Passes:** Add monthly passes or specific agency passes to the cards. Choose a pass product, such as a [PugetPass](#) or a Washington State Ferries pass, then click **Add to Card Order**. View the [ORCA Products and Price List](#) to learn more about your options.
- For Business Passport accounts, choose **Regional > Passport > Regional Business Passport**.
- The selected products will be applied to each card based on the quantity you entered. Click **Add to Cart** to proceed with your order if

the products look correct (see diagrams below).

- If you want to order additional cards with different products, click **Add More**.

## View of Passport-specific Order

**Add money**

Minimum of \$5.00 and maximum of \$400.00.

\$5  \$10  \$25  \$50

CUSTOM AMOUNT

**Add passes**

CHOOSE A REGIONAL OR AGENCY PASS

- Regional:** These passes will work across the region.
- Agency:** These passes are for riding with a specific transit agency.

CHOOSE FREQUENCY

- Passport

CHOOSE A PASS

## View of General Pass Order

**Add money**

Minimum of \$5.00 and maximum of \$400.00.

\$5  \$10  \$25  \$50

CUSTOM AMOUNT

**Add passes**

CHOOSE A REGIONAL OR AGENCY PASS

- Regional:** These passes will work across the region.
- Agency:** These passes are for riding with a specific transit agency.


CHOOSE FREQUENCY

- Monthly

CHOOSE THE FARE AMOUNT

### Purchase cards

Card orders have an estimated delivery time of five to seven business days from the date of purchase. Orders are not processed on weekends or holidays. ORCA agencies are not responsible for delays in the US Postal Service.



**Adult ORCA Card** **\$3.00**

No added money or passes

Quantity:

Full access

Card order association types

**Successfully added to your shopping cart**

1x - Adult ORCA Card  
1x - Regional Business Passport

Click on **Checkout** to go to the **Shopping Cart**.

Review order details. Double check all information in the shopping cart (verify that the shipping address is correct).

Note: If purchasing a [PugetPass](#) or non-WSF agency monthly pass, it can be done from the 15<sup>th</sup> of the previous month to the 14<sup>th</sup> of that month. That means a January monthly pass can be purchased from 12/15 - 1/14. If purchasing a WSF monthly pass, it can be done from the 15<sup>th</sup> of the previous month to the 10<sup>th</sup> of that month, and no pass can be purchased from the 11<sup>th</sup> – 14<sup>th</sup>.

**Previous Month:**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

**Month Wanted for Pass:**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

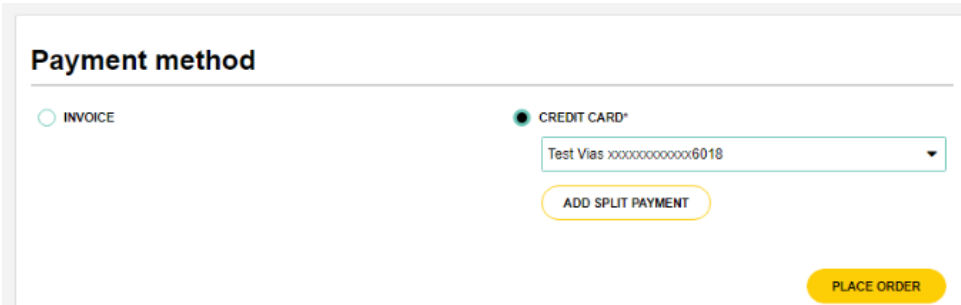
[PugetPass](#) or non-WSF agency monthly pass can be purchased

[WSF agency monthly pass purchase dates](#)

WSF agency monthly passes cannot be purchased on these dates

## Complete the Shopping Cart Details

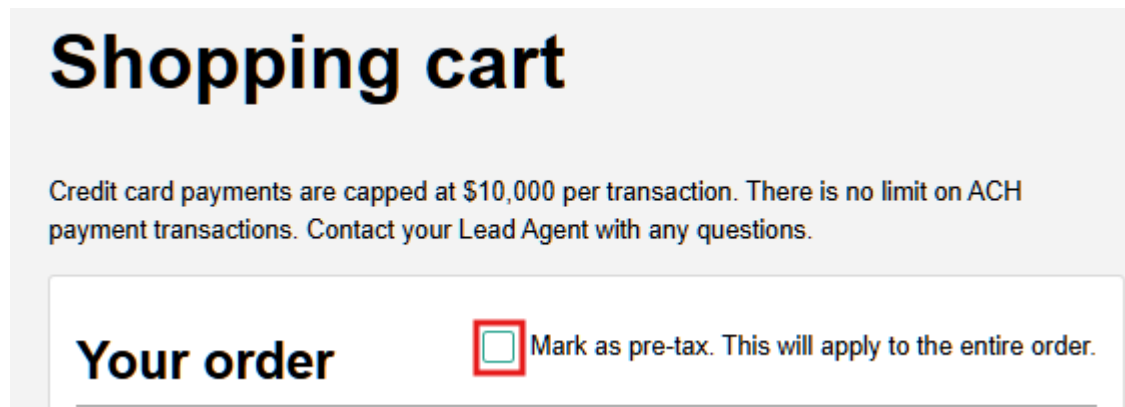
**Payment Method:** Select **Credit Card** or **ACH** as your payment option. You may be able to use Invoicing for your subsequent Sales and Orders. Contact your Business Leadagent for more details. To save your payment method, add your credit card(s) or ACH details through the Administration tab under **Account Settings** and scroll down to the **Payment Method** section. You can add multiple payment methods and assign nicknames for each.



The screenshot shows a 'Payment method' section with two radio buttons: 'INVOICE' (unselected) and 'CREDIT CARD\*' (selected). Below the 'CREDIT CARD\*' option is a dropdown menu showing 'Test Vias xxxxxxxxxxxxxxx6018'. There are two buttons: 'ADD SPLIT PAYMENT' and 'PLACE ORDER'.

Once all details are correct, click **Place Order**.

*Note: If your organization uses pre-tax payroll deductions for your employees' transit purchases, you can select this box at the top of the Shopping Cart to ensure that Pre-Tax E-purse is purchased rather than standard E-purse. Once added to the cards, there will be both a regular purse balance (for funds not designated as pre-tax) and a pre-tax purse balance. When taking transit trips using those cards, fares will be deducted from the pre-tax purse first. Please contact your Leadagent for more information on how to enable this function.*



The screenshot shows a 'Shopping cart' section with a heading 'Shopping cart' and a note: 'Credit card payments are capped at \$10,000 per transaction. There is no limit on ACH payment transactions. Contact your Lead Agent with any questions.' Below this is a section titled 'Your order' with a checkbox and the text 'Mark as pre-tax. This will apply to the entire order.'

After the order is completed, the new cards will appear on your account once they are fulfilled.

## Export Cards tied to an Order

**Export New Card Numbers:** To find a CSV file with all the card numbers from your orders, go to **Order History**, locate your order, select the blue triangle/arrow icon on the left-hand side ▼, and click **View Order Details**. From the dropdown menu on the right, select **CSV** and click **Export**.

## Manage cards page

For customers with an existing inventory of cards, the Home > Manage Cards page lists the cards linked to that account.

Columns include:

- **All:** Click the box under "All" to select all cards on the page or click the box next to an individual card to select it. You must select at least one checkbox to then select the “Manage” button and perform any card-specific actions.
- **Card #:** The ORCA card number.
- **[Identifier](#)**
- **Name:** The name of the participant
- **Group:** The group to which the Participant is assigned. Cards cannot be linked to Groups if they are not linked to a Participant first.
- **Status:** The status of the card, which may include Active, Locked, Replaced, Replacement Ordered, or Closed.
- **Access:** The Business Account’s permission level assigned to the card, including Full Access or Load Only.
- **Fare Category:** The fare type that determines what the owner of this card pays on transit.
- **Card Type:** This field shows whether this card is physical or digital
- **Replaced card #:** This field will list a previous CSN that was lost, stolen, broken, etc. and had to be replaced with the CSN in the “Card #” column.

Cards can be filtered and searched by the following categories:

- Card number
- Participant last name
- Has participant
- Group
- Fare category
- Card status
- Card type

- Replaced card number

Manage cards > Manage cards

**Manage cards**

MANAGE

**FILTER AND SEARCH BY**

Search by  Enter search term

- Card number
- Participant last name
- Has participant
- Group
- Fare category
- Card state
- Card type
- Replaced card number

All	Card #	Group	Status
<input type="checkbox"/>	14846628		Locked
<input type="checkbox"/>	14846627	WSF Central Sound Pass holders	Locked

Click on an individual card and select "Manage" to see details for that card. Within this sidebar, you can:

- **Remove Cards from the Business Account**
  - Removing a card from your Business Account will also remove any Passport products or autoloads. This action will not affect any monthly passes or E-purse funds already purchased and available on the card.
- [Lock/Unlock Cards](#)
- [Unlink Participant](#)
- [Close Card](#)
  - Close card if the card is lost or stolen. Cards cannot be closed if they still have product loaded.
  - If an employee is no longer with the company and has returned their ORCA card, unlink the participant. This allows the company to reassign the card to another employee.
  - This action does not directly Close the card but sends a request to your Business Leadagent to Close the card on your behalf. This action is not reversible.
- **Transfer Balance**

- The “Transfer From” field may show up as a drop-down menu or an open text field depending on the size of your Business. If it shows up as an open text field, you must search at least 3 numbers in sequence before the system will find a card match
- **Replace Card**
  - A permanent action to replace a physical card with a new card or an existing one on the account. After this action is conducted, the original Card Serial Number will show up in the “Replaced card #” column in the new card’s row.
- **View Existing Passes and Purchase Passes**
- **View E-purse Balance and Add Money**
- **Create, Edit, Pause, Resume, and Remove Autoloads**

Manage cards > Manage cards

**14846621**

**Jim Test**  
Full access

Remove Lock Unlink participant  
Close card Replace card

---

**E-PURSE**      **PASSES**

Total balance: \$7.25

Pre-tax funds: \$0.00

**Autoload**

Would you like to add an autoload to this card?

**TURN ON AUTOLOAD**

**Add money**

## Manage cards

EXPORT  
Choose type

**MANAGE**
FILTER AND SEARCH BY
**ADD CARD**

Search by

Enter search term

Q

All	Card #	Identifier	Name	Group	Status	Access	Fare category
<input type="checkbox"/>	9840001021002535941	9840001021002535941	Evan test	All Cards	Active	Load only	Adult
<input type="checkbox"/>	14846629		<a href="#">Assign participant</a>		Active	Full access	Adult
<input type="checkbox"/>	14846628	14846628	Henry test	All Cards	Active	Load only	Adult
<input type="checkbox"/>	14846622		<a href="#">Assign participant</a>		Active	Load only	Adult
<input checked="" type="checkbox"/>	14846621	14846621	Jim Test	All Cards	Active	Full access	Adult
<input type="checkbox"/>	14846620	14846620	Sally test	All Cards	Active	Full access	Adult
<input type="checkbox"/>	14846619		<a href="#">Assign participant</a>		Active	Full access	Adult

## Export cards

You can export card and participant lists to CSV or PDF files. The export function is available at the top right of each List page. You can export all cards on the account or filter the results before exporting. Exporting cards is particularly useful for performing Bulk Actions, which are further explained in [Bulk Card Management](#).

## Participants

Business Accounts can create Participants and assign cards to them. Click **Participants** to open the **Manage Participants** page. From here, you can view, filter, and search by the following criteria:

- First Name
- Last Name
- Card Number
- Group
- Identifier
- Email
- Phone Number

You can also export the Participant list or delete one or more Participants from this page.

Business Accounts can track card assignments within the **Participants** section if desired. Each card can only be assigned to a single participant, and only participants can be added to a group.

*Note: If you select “[Unlink a Participant](#)” on the **Manage Cards** page, the card will no longer be assigned to the Participant and will be removed from its group. Make sure to note these details beforehand. If you perform any actions but cannot recall a Participant’s previous Group, contact your Business Leadagent. The card will still remain in the Business Account.*

The screenshot shows the 'Manage participants' page in the ORCA system. The page has a dark header with the ORCA logo and 'BPT Custom Test' text. Navigation tabs include 'Cards', 'Participants', 'Groups', 'Bulk actions', and 'Administration'. Below the header, there's a breadcrumb 'Manage cards > Manage participants'. The main area is titled 'Manage participants' and contains a table of participants. The table has columns for Name, Card #, Group, Identifier, and Delete. The participants listed are: Big Bad Wolf (Card # 14846618), Brother Bernstein (Card # 14846624, Group Bernstein Bears), Honey Bernstein (Card # 14846625, Group Bernstein Bears), Sister Bernstein (Card # 14846626, Group Bernstein Bears), Little Blue Truck (Card # 14846623), Curious George (Card # 14846628), and Thomas Tank Engine (Card # 14846627). There are also buttons for 'ADD PARTICIPANT', 'EXPORT', and 'DELETE PARTICIPANT(S)'. A sidebar on the left is titled 'Edit participant' and contains form fields for First Name, Last Name, Email, Identifier, Card #, Group, and Phone Number.

This section details actions that are available using the Participants and Groups functions.


General Participant management actions include:


- Add Participant
- Export all or a selection of Participants
- Delete Participants

Once Participants are added, the following actions are available:

- Edit participant details
- Assign a Participant to an existing group

The Participant page includes a list of all the Participants registered by the business. The Participant table includes:

-  – click this icon to select a Participant to edit (opens "edit participant" actions sidebar)
- Name – first, last names (not required)
- Card # – card assigned to Participant, if available
- Group – group to which Participant is assigned, if available
- [Identifier](#) – identifier assigned to Participant by the institution (required)
- Delete – check box to delete Participant

Actions	Description
Filter and Search by	<p>Search choices include the following:</p> <p><b>First name</b> – enter text to search for value in the database</p> <p><b>Last name</b> -- enter text to search for value in the database</p> <p><b>Card number</b> – enter text to search for value in the database</p> <p><b>Group</b> – select dropdown of available group names</p> <p><b>Identifier</b> – enter text to search for value in the database</p> <p><b>Email</b> – enter text to search for value in the database</p> <p><b>Phone number</b> -- enter text to search for value in the database</p> <p> <i>Note: The search by value requires an exact match but is not case sensitive; the system does not enable partial matches and wild cards.</i></p>

## Add Participant

To add a Participant, click on the **Add Participant** button. This action will open the left panel displaying the **Add Participant** form.

The form includes the following fields (*Note: The only mandatory field is **Identifier***):

- **First Name:** Enter the participant’s first name.
- **Last Name:** Enter the participant’s last name.
- **Email:** Enter a valid email address (must be in email format).
- **Identifier:** Enter a unique alphanumeric identifier. The system checks for duplication in the participant list; an error message will display as “Please fix this field” if there is a duplicate.

*Note: Customers may use the card serial number or an employee ID number as the identifier. The card serial number is the default identifier for cards ordered before 5/13/22. Cards ordered after 5/13/22 will need to be assigned an identifier during the individual Participant creation process, or by using a Participant update bulk job. We recommend using the card serial number for those as well. Once an identifier is assigned, there is no bulk job capability for editing identifiers, only for creating them. They must be updated one-by-one on the Participants page.*

- **Card #:** Select an unassigned card from the drop-down list.
- **Group:** Select a group from the drop-down list.
- **Phone Number:** Enter a 10-digit phone number with area code.

Click **Add Participant** to finalize the process. A confirmation pop-up will appear, and the Participant will be inserted into the Manage Participants list in alphabetical order by last name.

## Edit Participant information

Once Participants are added, you can perform the following actions:

- **Edit Participant Details:** Change details, including the [Identifier](#).
- **Assign a Participant to a Group:** Add the Participant to an existing group.

To view and edit participant details:

1. **Move your mouse** to the first column in the **Manage Participants** list.
2. **Click on the row** for the Participant you want to edit. This will open the **Edit Participant** form, which is the same as the Add Participant form but titled **Edit Participant**.
  - **Edit Information:** Update, add, or delete information in any field on the form (except adding a card).
  - **Save Changes:** Click **Save** to apply your changes. A confirmation pop-up will appear to confirm the updates. After confirmation, the **Participants** list will reflect the edits.

To **add a card** to a Participant who does not have one assigned:

1. **Select Add Card** from the Edit Participant form or from the list.
2. **Add a Card:** The **Add Card to Participant** pop-up will appear.
  - **Select a Card:** Use the **Select Card** drop-down list to choose from available unassigned cards.
  - **Search for a Card:** Alternatively, you can add a card number or search by card number to assign a specific card to the participant.

## Remove Participant

A business may remove a Participant who is no longer affiliated with the business or eligible for transit benefits.

To **remove a Participant:**

1. **Unlink/Remove Cards:** Ensure that any cards associated with the Participant are unlinked from the Participant record, which can be done from the Manage Participants page by erasing the Card number from the “Card #” field, or removed from the business. Both actions can be performed from the Manage Cards page. The checkbox to select Participants for removal will be inactive for those linked to a card.
2. **Select Participants:** Use the checkbox on the left side of the list page to select one or more participants you wish to remove.
3. **Choose a Delete Option:** Click the **DELETE PARTICIPANT(S)** drop-down list to see the delete options:
  - **Checked:** Deletes only the rows that are checked.
  - **This Page:** Deletes all rows on the current page.
  - **All Filtered Results:** Deletes all rows that match the current search filter.

*Note: To remove several participants at once, you can set up a group and use the **Filter** function to select by group name. Then use the **All Filtered Results** option to delete all participants in that group.*

4. **Confirm Deletion:** After selecting a delete option, the action button will turn yellow. Click the **trash can icon** to proceed with the deletion.
  - A confirmation pop-up will appear reflecting the delete option you selected:
    - **Checked:** Shows the number of participants to be removed.
    - **This Page:** Shows the number of participants on the current page to be deleted.

- **All Filtered Results:** Shows the number of filtered participants to be deleted.

5. **Complete the Action:** Click **Delete Participant** to confirm the action. The participant(s) will be removed from the Participant List.

## 4. Digital cards

Android users can now use ORCA with Google Pay to convert their ORCA card to Google Wallet™.

- [Opt-in as a Passport Business](#)
- [Opt-in as a Choice Business](#)

To learn more about this new feature or opt in, visit the following resources or contact your Business Leadagent.

- [FAQs](#)
- [ORCA for Google Pay user guide](#)

## 5. Bulk card management

The Bulk Actions section allows admins to apply various actions using a CSV file or by group. See [Bulk Actions Tips and Tricks](#) on myORCA.com for instructions on how to format, conduct, and troubleshoot bulk jobs. The page provides detailed information on how to format CSV files for upload. If you need any assistance, contact your Business Leadagent for more information. Below you will find information on the second method of running Bulk Jobs, Groups.

### How to place new cards into groups

#### Complete New Card Order:

- After a new card order is complete, get a list of the new card serial numbers by going to "Administration" in the navigation bar.
- Click "Order History."
- Find the receipt by clicking the blue icon to the left of the "Receipt Reference" number to expand the drop-down menu and click "View Order Details."
- Choose "Export by CSV."

#### Prepare CSV File:

- This will give you a CSV file of the card serial numbers. Ensure the column header says "PrintedCardNumber."

- Open the CSV file.
- Create a new column titled "Identifier."
- Copy card serial numbers to the identifier column.
- Save as a CSV file.

### **Upload and Confirm:**

- Go to "Bulk Actions" then "Add Participants" and follow the instructions on this page. For more information on how to conduct Bulk actions, visit the [Bulk actions tips and trips page](#).
- Confirm in the "Bulk Actions Past Processes" section that the bulk action was completed. You can also check by clicking on "Participants" and reviewing the card details.

### **Add Cards to Groups:**

- If you already have an existing group, go to "Bulk Actions" then "Add Participants to Group." For more information on how to conduct Bulk actions, visit the [Bulk actions tips and trips page](#).
- Follow the instructions on this page. You will need a CSV file with only the identifier number.

*Note: An Identifier is needed to assign the card to a group. Without an identifier, the card cannot be added to a group. It's recommended that you use the card serial number as the identifier.*

## **6. Adding products and money to cards**

*To add value to a card, visit the "Manage Cards" page, select a card, then click "Manage" to view the current E-purse details. This tab includes the card number, assigned participant, permission setting, and available functions for managing the card. You can manage the E-purse Autoload and add money to the card. View [Add product to ORCA cards](#) section of this document for more guidance on Sale and product rules.*

### **Adding money (E-purse)**

#### **Step 1:**

Click on a fixed amount or enter a custom amount.

#### **Step 2:**

Click "Add to cart" The value is now added to your shopping cart.

Click "Checkout" to proceed to the shopping cart or repeat the above steps to add money to additional cards.

## **Adding a pass**

### **Step 1:**

Click a checkbox for the pass type: Regional or Agency. All current Pass product can be viewed on the [ORCA Products and Price List](#).

#### **Step 1a: Regional Pass**

When you click "Regional," you can select a daily, monthly pass, or Regional Business Passport (for passport customers).

For monthly passes, click the drop-down to select the appropriate PugetPass value.

The pass product total will be shown in the **CHOOSE THE FARE AMOUNT** field.

Select the month and click "Add to cart."

#### **Step 1b: Agency Pass**

To purchase an Agency pass, select an agency (**SELECT AGENCY**) and a pass type (**CHOOSE A PASS**).

Select a month if more than one is displayed.

Click "Add to cart."

### **Step 2:**

Once you've clicked "Add to cart," the order will appear in the "Add passes" panel.

### **Step 3:**

Repeat the above steps to add passes to additional cards.

Click "Checkout" to purchase your order. The screen will transition to the shopping cart.

## **Autoload process**

### **Step 1:**

To initiate the autoload process, click "Turn on autoload."

## Step 2:

### Threshold-Based Autoload:

- Enter the balance that will trigger the autoload.
- Enter the amount to add to the E-purse.
- Review the primary payment source. Click the drop-down list to view all the source types.
- Add a backup payment method (optional). When you click the “Add back up payment” link, a drop-down appears with other saved payment methods.
- Click "Split payment" to divide the payment among multiple payment methods. The second payment method can also include a backup payment source.
- Click "Save" and a confirmation pop-up will appear.

### Time-Based Autoload:

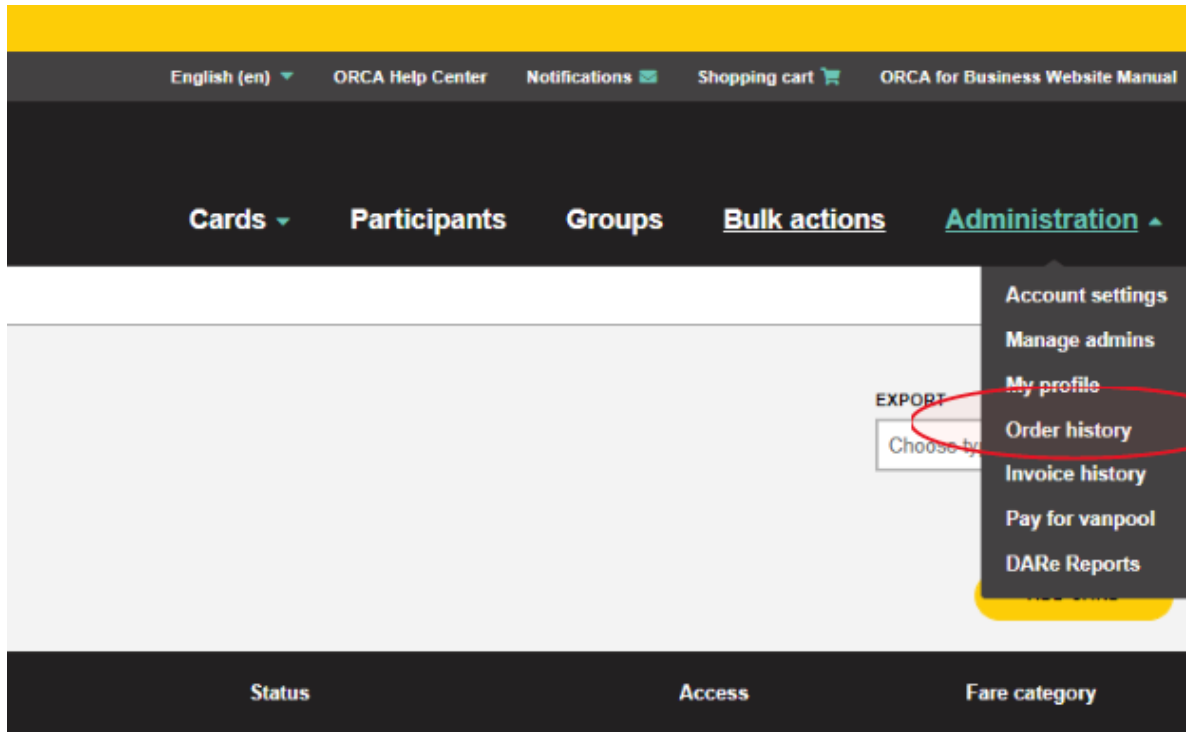
- Select the day of the month to trigger the autoload.
- Enter the amount to add to the E-purse.
- The payment source, backup, and split payment functions work the same as the threshold-based autoload function.
- Click "Save" to activate the time-based autoload. The new autoload conditions will be displayed. You can add more than one time-based E-purse autoload.

## Adding Passport to your order

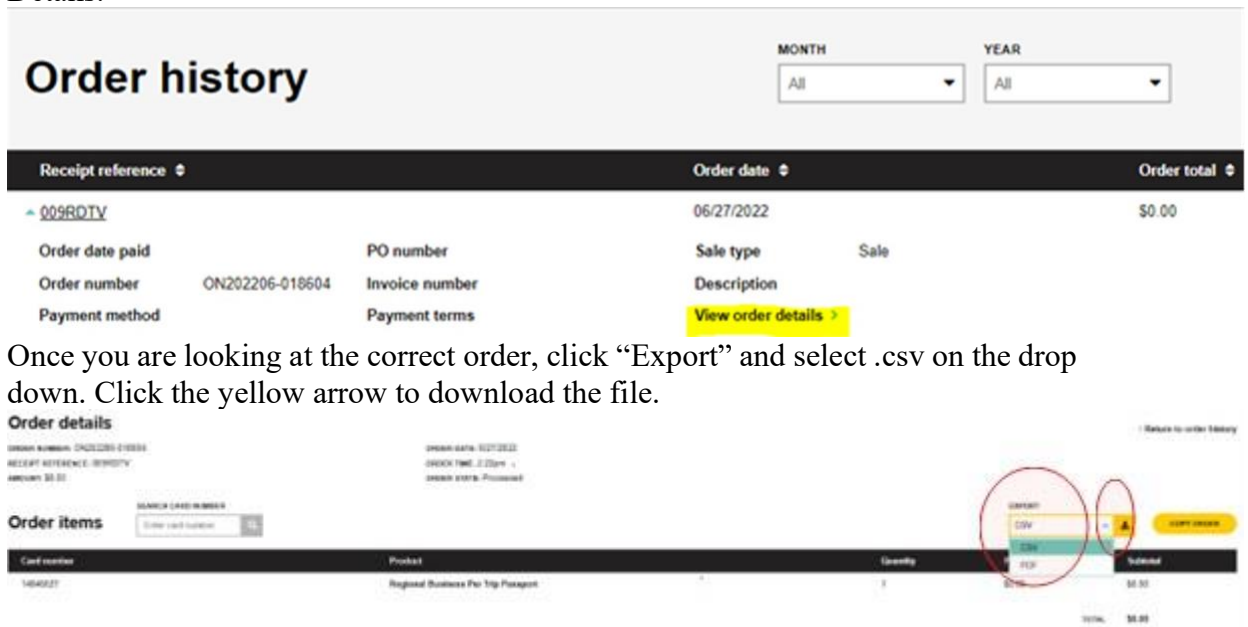
Use these steps if you forgot to put Passport on the cards after ordering them.

*Note: When you receive the cards, don't distribute them until Passport is loaded!*

**Download the csv file of the cards in your order.**



1. Click “Administration” and select “Order History.”
2. Find your order (the order number should be on the packing slip). Click “View Order Details.”



3. Once you are looking at the correct order, click “Export” and select .csv on the drop down. Click the yellow arrow to download the file.

4. Once you have the .csv file, you will need to modify it before using the Add Money and/or Passes bulk job.

A	B	C	D	E	F	G	H	I	J	K
Order date	Order time	Receipt ref	Sale type	Order state	Card number	Product	Quantity	Price	Subtotal	Total
1/17/2023	2:24pm	0XXXXXX	Order	Processed	98400010XXXXXXXXXX	Adult ORCA Card - BA	1	\$3.00	\$3.00	
1/17/2023	2:24pm	0XXXXXX	Order	Processed	98400010XXXXXXXXXX	Adult ORCA Card - BA	1	\$3.00	\$3.00	
1/17/2023	2:24pm	0XXXXXX	Order	Processed	98400010XXXXXXXXXX	Adult ORCA Card - BA	1	\$3.00	\$3.00	
1/17/2023	2:24pm	0XXXXXX	Order	Processed	98400010XXXXXXXXXX	Adult ORCA Card - BA	1	\$3.00	\$3.00	
1/17/2023	2:24pm	0XXXXXX	Order	Processed	98400010XXXXXXXXXX	Adult ORCA Card - BA	1	\$3.00	\$3.00	
1/17/2023	2:24pm	0XXXXXX	Order	Processed	98400010XXXXXXXXXX	Adult ORCA Card - BA	1	\$3.00	\$3.00	
1/17/2023	2:24pm	0XXXXXX	Order	Processed	98400010XXXXXXXXXX	Adult ORCA Card - BA	1	\$3.00	\$3.00	
1/17/2023	2:24pm	0XXXXXX	Order	Processed	98400010XXXXXXXXXX	Adult ORCA Card - BA	1	\$3.00	\$3.00	
1/17/2023	2:24pm	0XXXXXX	Order	Processed	98400010XXXXXXXXXX	Adult ORCA Card - BA	1	\$3.00	\$3.00	
1/17/2023	2:24pm	0XXXXXX	Order	Processed	98400010XXXXXXXXXX	Adult ORCA Card - BA	1	\$3.00	\$3.00	

- On the Bulk Actions page, you can see that the required information is a column header called “PrintedCardNumber” and then copy and paste the card numbers below.

# Bulk add money and/or passes

Use this feature to add money and/or passes to a large number of cards.

## 1. Upload file or select a group

UPLOAD A FILE

SELECT A GROUP

Create a CSV with the following information:

- PrintedCardNumber\*

```
PrintedCardNumber
800000001
800000002
```

Asterisk (\*) indicates required field. If you don't have this information please contact your ORCA representative.

CHOOSE A FILE

No file selected

UPLOAD

The modified .csv will look like this:

A1		✕		✓		fx		PrintedCardNumber	
	A	B	C	D					
1	PrintedCardNumber								
2	984000102XXXXXXXX								
3	984000102XXXXXXXX								
4	984000102XXXXXXXX								
5	984000102XXXXXXXX								
6	984000102XXXXXXXX								
7	984000102XXXXXXXX								
8	984000102XXXXXXXX								
9	984000102XXXXXXXX								

# 1. Upload file or select a group

UPLOAD A FILE

SELECT A GROUP

Create a CSV with the following information:

- PrintedCardNumber\*

```
PrintedCardNumber
800000001
800000002
```

Asterisk (\*) indicates required field. If you don't have this information please contact your ORCA representative.

CHOOSE A FILE

No file selected

UPLOAD

## 2. Review data

After uploading the file, we'll let you know if any changes are needed to pass validation.

## 3. Select money and/or passes

Please select a value amount and/or passes to add to this bulk purchase.

SELECT MONEY / PASSES

Please note that if you are having issues formatting your file, visit the [Bulk actions tips and trips page](#) while logged into your account for more advice.

## 2. Select money and/or passes

Please select a value amount and/or passes to add to this bulk purchase.

**Add money**

Minimum of \$5.00 and maximum of \$400.00.

**\$5**   **\$10**   **\$25**   **\$50**

CUSTOM AMOUNT

\$ 0.00

ADD TO CART

No items added.

CHECKOUT

**Add passes**

CHOOSE A REGIONAL OR AGENCY PASS

**Regional:** These passes will work across the region.

**Agency:** These passes are for riding with a specific transit agency.

CHOOSE FREQUENCY

Monthly

CHOOSE THE FARE AMOUNT

Select your usual one-way trip cost

ADD TO CART

1. Go to “Add Passes” → “Regional” → “Regional Business Passport”
2. Select “Add to Cart.”
3. Go to the Shopping Cart and complete the order. The cost will be \$0.00 (since you are billed for transit usage monthly).

You can check the progress of this bulk action by going to the Bulk Actions page. Once completed, you should spot check a few cards to ensure that the Passport product is on there by looking up the card in “Manage Cards” and then clicking on the “Passes” tab to see if a Passport product is on the card.

## 7. Card ownership & access

### ORCA Business Passport accounts

ORCA Business Passport Accounts manage cards under two main access levels:

1. **Business: Full Access with Global Ownership Flag**
2. **Cardholder: Load Only.**

Below is a detailed explanation of each access type and the corresponding capabilities.

#### **Business: Full Access with Global Ownership Flag**

When a card is assigned to a Business Account with Full Access and the Global Ownership Flag:

- The business has complete control over the card. This includes the ability to check balances, [lock/unlock](#) the card, add or remove the card from the Business Account, close the card, replace the card, transfer balances, add E-purse funds and/or passes/products, and view order receipts for purchases made by the business.
- The Global Ownership Flag is applied at the account level, affecting all cards linked to the Business Account.

#### **Cardholder: Load Only**

For cards assigned to cardholders with [Load Only](#) access:

- Cardholders cannot link the card to their ORCA mobile app or website account for full access. Instead, they can only add the card under a "Load Only" status.
- Under Load Only access, cardholders can load E-purse funds or purchase passes using the ORCA website or a vending machine.
- Cardholders will not be able to view any products, including the Passport product, that are loaded onto the card by the Business Account.

If your business requires that employees have additional functionalities—such as checking card balances, using E-purse funds for other products (e.g., a Washington State Ferry passenger monthly pass), viewing travel history, locking/unlocking or closing the card, or transferring balances—the business must grant Full Access to the cardholder.

#### **Granting Full Access to a Cardholder**

To give a cardholder [Full Access](#) to their ORCA card:

1. **Remove the Card:** The business must first remove the card from the Business Account.

2. **Re-add the Card:** The card must then be re-added to the Business Account without including the security code. This will assign the card to the Business Account as "Load Only" access.
  - a. *Note: There is a bulk action available to add multiple cards as "Load Only."*
3. **(Passport accounts only) Re-add the Passport product:** When a card is removed from the Business Account, the Passport product will be removed from the card. Use the "Manage Card" function to add the Regional Passport product.
4. **Linking by Cardholder:** The cardholder can now link the card to their personal ORCA account, including the security code. This action will establish a Load Only relationship for the business, while the cardholder gains Full Access to the card.
  - a. *Note: There is no bulk action available for adding cards with Full Access. The cardholder must individually link the card to their personal account to gain Full Access.*

## ORCA Business Choice accounts

### Business: Load Only with Global Ownership Flag

In Business Choice accounts, the business has full administrative access to the cards, allowing them to check balances, [lock/unlock](#) cards, add/remove cards from the Business Account, close cards, replace cards, add E-purse funds, and purchase passes/products (including setting up most autoloads). The Global Ownership Flag applies to all cards within the Business Account and is set at the account level.

When ordering new cards, the business has the option to select either [Load Only](#) or [Full Access](#) for each card.

### Cardholder: Full Access

When the cardholder of a Choice account has Full Access, they have the ability to:

- Check card balances
- Review their own trip history
- Lock/lock their own cards
- Add their own E-purse funds and Pass products
- Conduct Balance Transfers between their other cards

Despite having a Full Access relationship with the card, the cardholder will not be able to Replace their own card or Close their own card without permission.

## FAQ and Troubleshooting

*An employee reported that their card isn't working. What are the first things I should check to troubleshoot?*

If your cards are not working:

1. **Check card status:** Verify if the card is **Active** or **Locked**. If the card is Locked, unlock the card.
2. **Verify balance:** Ensure the E-purse has sufficient funds.
3. **Check passes:** Confirm that the appropriate passes are loaded on the card. For Passport, the card should have a Passport product loaded.
4. **Check expiration:** Ensure the card or pass has not expired.

*What if I forgot to add Regional Passport to the card at the time of order?*

The full process of adding value can be found in the “[Add Products to ORCA Cards](#)” section of this document. If you missed this step, you will need to contact your business account representative for assistance, or follow instructions in the “[Adding Passport to your Order](#)” section. If cards are not loaded with Passport and a cardholder uses it, the cards will accrue a negative balance and stop working.

*An employee lost a card. What do I do?*

If an employee loses a card:

1. **Lock original card:** Lock the card in the **Manage Cards** page; this is so that it cannot be used if it is found by someone else.
2. **Replace the card:** Request a replacement in the **Manage Cards** page to issue a new card to the employee.

*An employee is no longer with the company. How should I handle their card?*

For a departing employee:

1. **[Unlink/Remove card](#):**
  - Selecting “Remove” allows the cardholder to keep their card for personal use, but it is no longer associated with the business account. This will also remove the Passport product from the card.

- *Note: Block (lock) will prevent the employee from using the card, but the card will still appear on your card list. We recommend this action if you get the card back from the employee and plan to reissue the card to a different employee.*

## 2. Reassign card:

- Plastic cards: If the plastic card is returned and the card is not registered to the employee as Load Only, it can be reassigned to a new cardholder.
- Digital cards: These cannot be reassigned to a different employee. Using the “Remove” function to unlink it from the account ensures that the Passport product is removed.

### *What is the card replacement process?*

To replace a card:

1. **Select the card:** Navigate to the **Manage Cards** page and find the card to be replaced (this is specific to cards loaded with Washington State Ferries).
2. **Request replacement:** Click **Replace Card** and follow the instructions to replace the card with a new one.

The number of cards can exceed the number of employees if multiple cards are issued to a single employee or for different purposes.

### *If I remove the card, is there a historical database of a card that was on my account at some point?*

No, removing a card will not keep a historical record of the card in the Business Account. For a record of past transactions or statuses, you will need to refer to **Order History**, **Invoice Payment** (current outstanding Invoices and Credit Notes), or **Invoice History** (last 36 months of Invoice and Credit Note records).

## **Troubleshooting tips**

If you encounter issues that are not addressed in the FAQs, try the following general troubleshooting steps:

1. **Check User Permissions:** Ensure you have the correct access rights for the actions you are trying to perform.
2. **Verify Data:** Double-check for any errors in data entered, such as card numbers or email addresses.
3. **Refresh and Retry:** Sometimes a page refresh or retrying the action can resolve temporary issues.

4. **Clear Cache:** Clear your browser's cache and cookies to resolve any display or functionality problems.
5. **Contact Support:** If you continue to experience issues, contact the business account rep for help.

For detailed support options visit:

- [Employer Services](#) for Passport customers
- [Business Lead Agent](#) for Choice customers