
Quick Instructions for Incentive Program Training and Administration

SmartRideshare.com

What Are Quick Instructions?

This document is a compilation of simplified, short instructional sheets intended to help you quickly accomplish some of *SmartRideshare*'s prize drawing and incentive-related functions without having to wade through the larger Administrator's Manual.

All instructions are from Chapter 7: Managing Prize Drawings and Chapter 8: Managing Incentive Programs of the Administrator's Manual. For more detailed instructions and further discussion and explanation, please consult the manual.

What Administrative Tasks Are Covered?

This document contains the following instruction sheets:

- Conducting a Prize Drawing
- Managing Prize Drawings
- Configuring External Rewards
- Configuring Electronic Rewards
- Managing External Rewards
- Managing Electronic Rewards
- Configuring an Incentive Program
- Managing an Incentive Program/Distributing Rewards
- Conducting a Prize Drawing through an Incentive Program
- Discontinuing an Incentive Program

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Conducting a Prize Drawing

1. Select a prize to give away and notify users of the contest

- 1.1 Most often, you will want to have a prize to give away before setting up the prize drawing process. You will also need to set up your own system of tracking prizes for drawings.
- 1.2 The system selects users who meet your specified contest eligibility criteria by searching through entries that users make in their travel calendars. Give users a chance to meet your eligibility requirements by giving them advance notice of the contest and its requirements.

2. Configure the prize drawing

- 2.1 Within your network, select **Benefits** from the navigation bar.
- 2.2 Click **Manage Prize Drawing** in the Prize Drawings box.
- 2.3 In the Specify Criteria box:
 - a. Select one or more of the modes that will qualify your users for this drawing. (Note that “Other” can be used to designate “drive alone” if your real objective is to encourage new registrations and not necessarily ride sharing within the calendar tracking period.)
 - b. Type in a calendar tracking start date (dd/mm/yyyy), the first day of the contest eligibility period.
 - c. Type in a calendar tracking end date (dd/mm/yyyy). The contest period may be any duration.
 - d. Indicate whether the drawing is for only newly registered users (**Yes**) or all network users (**No**). If you select Yes, then winners must not only meet all the eligibility criteria but also create their system registration.
 - e. Indicate the units of measurement for eligibility: number of miles, trips, or days. Note that if you choose “trips,” each logged leg of a multi-modal commute will count as a trip. If that is not your intention, you may want to select “days” instead.
 - f. Enter the qualifying number for those units of measurement; for example, 100 (miles), 10 (trips), or 2 (days).

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- g. Indicate the necessary trip purpose: commute and/or work-related/non-commute. (Regional administrators also have choices for personal and SchoolPool trips.)
- h. Indicate whether this drawing should include previous prize winners. Selecting **No** will preclude previous winners from winning again. Previous winners will continue to be excluded until you Reset All Records. Selecting **Yes** will give everyone the chance to win multiple times.

3. Get a count of eligible users

- 3.1 Click on **Get a count of users who qualify**.
- 3.2 If the number of eligible users is greater than 0, then continue to step 4.

4. Choose a winner

- 4.1 Type in a description of the prize or drawing program name.
- 4.2 Click **Pick Winner**. The program randomly selects one of the network users who meet your specified drawing criteria.
- 4.3 The winner's name and email address then appear in the Pick Winner box.
- 4.4 Clicking on the **winner's name**/link moves you to that person's User Details page.

5. If desired, choose multiple winners

- 5.1 If you have set up your contest so that it will have more than one winner per drawing, you must repeat two steps for each winner:
- 5.2 Click on **Get a count of users who qualify**.
- 5.3 Click **Pick Winner**. A new name will appear.

6. Notify the winner(s)

- 6.1 The *SmartRideshare* system does not notify the drawing winner. Unlike incentive programs, the prize will *not* appear as a pending reward in the user's system. You must communicate with the selected winner(s) directly, such as by personal e-mail.



Managing Prize Drawings

A. Review a list of previous winners

Use this list of all prize winners to meet accounting requirements for tracking the awarding of prizes and to respond to users' inquiries. This list includes only individuals whose name has been selected to receive an award from *drawings*, not from incentive programs.

1. Click **Show Previous Winners**.
2. To specify search beginning and ending dates, enter a different **From Date** and/or **To Date** and click **View Details**.

B. Delete all prize drawing records

You can delete all prize drawing program information and reset the prize drawing function. You will need to do this to restart your drawing or to begin a new drawing program.



Before you reset the program, it is best to archive the records of the winners. It is not possible to export data from the previous winners' list. You will need to copy the output of the "Show Previous Winners" button to a spreadsheet or other program on your computer.

1. Click **Reset All Records**.
2. At the prompt, "Resetting will remove all history information associated with this benefit. Do you want to continue?" click **OK**.

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Configuring Rewards—External

Before you can set up an incentive program, you must first configure the program's rewards. *External rewards* include physical items such as T-shirts, event tickets, and gift cards and are provided directly by you or another vendor, outside of the *SmartRideshare* system. If a gift certificate is provided through a physical gift card, then the reward is defined as external.

1. Select a graphic

- 1.1 Select an image to represent the reward and prepare it for uploading to the system. This file must be in a .jpg, .tif, or .bmp image format and no larger than 120x120 pixels.

2. Add an external reward

- 2.1 Within your network, select **Benefits** from the navigation bar.
- 2.2 Click **View Rewards**, which appears below the list of incentives.
- 2.3 Click **Add Reward** at the top right of the page.
- 2.4 In the **Reward** box:
 - a. Type in the name of the reward (for example, “Amazon gift certificate (electronic)”).
 - b. Enter the vendor name.
 - c. Enter the value of the reward.
 - d. Select whether the reward will be fulfilled electronically.
 - e. Upload from your computer your image to represent the reward.
 - f. Type in a **Redeem Message** with instructions about how to redeem the reward.
 - g. Type in a **Contact Message** with contact information that will help users who have questions about the reward or who experience difficulties in redeeming the reward.
 - h. Type in a customized **Reward Message** from your organization to the recipient. These three messages will appear to users when they click the link **View redeem instructions** to learn how to retrieve their reward.
- 2.5 Click **Save**.
- 2.6 Click **Go Back to Rewards** at the top. The new reward will appear in the **Rewards** box.

3. Indicate external reward instances

Once you have configured a reward, you need to indicate the reward *instances*, that is, the number available. You can control your inventory by later adding or deleting instances.

- 3.1 Click **View Rewards** below the list of incentives.

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3.2 Next to the Available Count of the appropriate reward, click **Add**.

3.3 In the Add to Available Count box, type

- a. The number of this award available (can be increased or decreased later)
- b. An order ID number
- c. A description of the reward or order

3.4 Click **Add**. The number available appears next to Available Count.

Configuring Rewards—Electronic

Before you can set up an incentive program, you must first configure the program's rewards. *Electronic rewards*, such as electronic gift certificates, allow users to collect the prize online by using a gift code or link.

1. Select a graphic

- 1.1 Select an image to represent the reward and prepare it for uploading to the system. This file must be in a .jpg, .tif, or .bmp image format and no larger than 120x120 pixels.

2. Add an electronic reward

- 2.1 Within your network, select **Benefits** from the navigation bar.
- 2.2 Click **View Rewards**, which appears below the list of incentives.
- 2.3 Click **Add Reward** at the top right of the page.
- 2.4 In the **Reward** box:
 - i. Type in the name of the reward (for example, “Amazon gift certificate (electronic)”).
 - j. Enter the vendor name.
 - k. Enter the value of the reward.
 - l. Select whether the reward will be fulfilled electronically.
 - m. For electronic rewards only, enter the number of days (1 to 180) you wish to wait before revoking rewards with unused redemption codes. The countdown begins when you approve the user's reward request; you may leave the number blank for no time restriction.
 - n. Upload from your computer your image to represent the reward.
 - o. Type in a **Redeem Message** with instructions about how to redeem the reward.
 - p. Type in a **Contact Message** with contact information that will help users who have questions about the reward or who experience difficulties in redeeming the reward.
 - q. Type in a customized **Reward Message** from your organization to the recipient. These three messages will appear to users when they click the link **View redeem instructions** to learn how to retrieve their reward.
- 2.5 Click **Save**.
- 2.6 Click **Go Back to Rewards** at the top. The new reward will appear in the **Rewards** box.

3. Indicate electronic reward instances

Once you have configured a reward, you need to indicate the reward *instances*, that is, the number available. You can control your inventory by later adding or deleting instances.

For electronic rewards, you add instances by importing redemption codes within a CSV file. You can upload additional redemption codes for the same reward more than once.

3.1 Import a CSV template.

If this is your first time creating a CSV file to import, then you need to download a CSV template.

- a. Click **View Rewards** below the list of incentives.
- b. Next to the Available Count of the appropriate reward, click **Add**.
- c. In the Import Reward Redeem Codes box, click on **Click here to download CSV template** and save the file to your computer.
- d. Using your own spreadsheet software, open and fill this file with sequence numbers (1, 2, 3...number of rewards available), redemption codes, and the denomination for the electronic gift certificate. Save the file in the CSV format.

3.2 Upload an electronic, CSV reward file.

- a. Within your network, select **Benefits** from the navigation bar.
- b. Click **View Rewards**.
- c. Next to the Available Count of the appropriate reward, click **Add**.
- d. In the Import Reward Redeem Codes box, type an **Order ID** and reward **description**.
- e. Click **Browse** to find the CSV file on your computer.
- f. Click **Upload**.
- g. With a successful upload, you are presented with a Preview window. For records that contain an error, the type of error is described in the left-hand column.
- h. If errors are present, click **Cancel Import**. You can then fix the errors with your software and run the upload process again, importing the file with the corrected records.
- i. If the Preview shows no errors, click **Complete Import**.
- j. Click **Go Back to View Rewards**. The number available appears next to Available Count.



Managing Rewards—External

A. View rewards

Follow these three steps to access any of the reward management functions described below.

1. Within your network, select **Benefits** from the navigation bar.
2. Click **View Rewards**, below the list of incentives.
3. The system default is to **Show Active Rewards**, that is, only rewards that are currently in use (that have not been removed). To see rewards that have been deleted, select **Show All Rewards** from the drop-down menu.

B. Edit a reward name, graphic or description

1. Access **View Rewards**.
2. Click **Edit** to the right of the appropriate reward.
3. Enter the necessary changes (except its value or whether it is electronic or external).
4. Click **Save** below.
5. Click **Go Back to Rewards** at the top.

C. Increase external reward instances

If you acquire additional external reward instances, you need to change the number in the system.

1. Access **View Rewards**.
2. Click **Add** next to the **Available Count** of the appropriate reward.
3. In the Add to Available Count box, type
 - a. The **number** of reward instances to add
 - b. An **order ID** number
 - c. A **description** of the reward or order.
4. Click **Add**. The revised available number appears next to Available Count.

D. Decrease reward instances

When users select a reward through the normal incentive program process, the system automatically decreases the recorded number available. However, if you have fewer reward instances than the system knows about, you must manually change the number in the system.

1. Access **View Rewards**.
2. Click **Delete** next to the Available Count of the appropriate reward.
3. In the Delete From Available Count box, type
 - a. The **number** of this reward to be subtracted
 - b. A **description** of why the instances are being deleted.
4. Click **Delete**. The revised available number appears next to Available Count.

E. Remove a reward

The link for this option appears only if the reward is no longer assigned to any incentive programs and there are no outstanding user claims for it; that is, either all users have selected their reward or you have fulfilled or forfeited all outstanding rewards.

1. Access **View Rewards**.
2. Click **Remove** to the right of the appropriate reward. This link will not appear if any claims for the reward are outstanding.
3. At the message, “This reward will be deleted. Do you want to continue?” click **OK** to delete the reward.



Managing Rewards—Electronic

A. View rewards

Follow these three steps to access any of the reward management functions described below.

1. Within your network, select **Benefits** from the navigation bar.
2. Click **View Rewards**, below the list of incentives.
3. The system default is to **Show Active Rewards**, that is, only rewards that are currently in use (that have not been removed). To see rewards that have been deleted, select **Show All Rewards** from the drop-down menu.

B. Edit a reward name, graphic or description

1. Access **View Rewards**.
2. Click **Edit** to the right of the appropriate reward.
3. Enter the necessary changes (except its value or whether it is electronic or external).
4. Click **Save** below.
5. Click **Go Back to Rewards** at the top.

C. Increase electronic reward instances

If you acquire additional electronic reward instances, you need to change the number in the system.

3. Access **View Rewards**.
4. Click **Add** next to the **Available Count** of the appropriate reward.
5. In the Import Reward Redeem Codes box, type in an **Order ID** and a **description** of the reward.
6. Click **Browse** to find the correct CSV file on your computer.
7. Click **Upload**.

6. If the Preview shows no errors, click **Complete Import**. The revised number appears next to Available Count.

D. Decrease reward instances

When users select a reward through the normal incentive program process, the system automatically decreases the recorded number available. However, if you have fewer reward instances than the system knows about, you must manually change the number in the system.

5. Access **View Rewards**.
6. Click **Delete** next to the Available Count of the appropriate reward.
7. In the Delete From Available Count box, type
 - c. The **number** of this reward to be subtracted
 - d. A **description** of why the instances are being deleted.
8. Click **Delete**. The revised available number appears next to Available Count.

E. Take back unused electronic redemption codes

The link/function “Redeem codes not opened” shows you a list of eligible users whose request for an electronic reward you have approved, but who have not subsequently clicked the View Redeem Instructions link within the timeframe you defined during reward configuration. The timeframe countdown begins when you approve the reward request. (Once a user has clicked the View Redeem Instructions link, you cannot take back the redemption code.) You can choose to retrieve those unopened redemption codes in order to reward them to other eligible users.

1. Access **View Rewards**.
2. Click **Redeem codes not opened** to the right of the appropriate reward.
 - a. If none of the electronic rewards has been awarded or selected, or recipients are still within the defined redemption timeframe, then a message says, “There are no redeem codes that have not been opened (redeem codes which can be taken back).”
 - b. If users have been awarded or have selected electronic rewards and allowed the redemption timeframe to lapse, a list appears.
3. Click the **Take back** button next to the appropriate name(s), to retrieve the code(s).
4. Click **Go back to View Rewards**. The number next to Available Count increases.

F. Remove a reward

The link for this option appears only if the reward is no longer assigned to any incentive programs and there are no outstanding user claims for it; that is, either all users have selected their reward or you have fulfilled or forfeited all outstanding rewards.

4. Access **View Rewards**.
5. Click **Remove** to the right of the appropriate reward. This link will not appear if any claims for the reward are outstanding.
6. At the message, “This reward will be deleted. Do you want to continue?” click **OK** to delete the reward.

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Configuring an Incentive Program

Once your reward has been configured, you can set up the details of the incentive program.

1. Add an incentive program and basic information

1.1 Within your network, select **Benefits** from the navigation bar.

1.2 Click **Add Incentive**.

1.3 In the **Incentive Program** box,

- a. Type in the name of the program.
- b. Indicate whether to show the incentive to users. You might select **No** in order to give out a secret reward to users who are calendaring
- c. Indicate whether to show the **Submit Request** button to users. This will appear to users under Rewards>Incentive Programs after they have met the eligibility criteria.



Select **Yes** if you want users to request the reward once they qualify. This option is preferred if you have a fixed number of rewards, so that users will receive rewards on a first-come, first-served basis while rewards last.
Select **No** if you intend to use the incentive program to run a prize drawing.

- d. Leave the option to **Link this incentive** blank unless you want to link the incentive to another active incentive program within your network.
- e. Enter a first-come, first-served limit if the number of rewards available is fixed. If you leave this blank, the number of approvals will not be limited. You can return to increase this number later. It is not the same as the reward instances number.

2. Configure eligibility criteria

Fill in the **Incentive Program Eligibility Criteria** box.

2.1 Indicate whether users must log trips on their account Calendars to meet mode usage criteria (**Yes**). Selecting **No** will hide the time and mode criteria choices described below.

2.2 Indicate whether the program is for only newly registered users (**Yes**) or all users (**No**). Select **Yes** if the purpose of the incentive program is to attract new users to the system or your network.

- a. If you select **Yes**, indicate whether the person must be a new registrant to the system or a new member of the network.

- b. If you select Yes, indicate the number of days within which new users have to register or join your network to qualify for the incentive. The countdown begins at the incentive program start date.
- c. [For administrators of Regional, City, County, and TMA networks: an option appears to select whether the user must live or work, or either, in the area to qualify for the incentive.]

2.3 Indicate whether the program is based on trips, non-SOV miles, or days. Note that if you choose “trips,” each logged leg of a multi-modal commute will count as a trip. If that is not your intention, you may want to select “days” instead.

2.4 Enter a qualifying number of trips, miles, or days.

2.5 Select the qualifying mode(s).

2.6 Select eligible trip purpose(s): Commute or Work Related (Non-commute). [Regional, County, Jurisdiction, and TMA networks also see a Personal Trip option.]

2.7 Indicate whether trips applied toward reward eligibility should be marked as “used” in the system. Checking this box means that a trip cannot qualify to meet the criteria of more than one incentive program.

3. Configure program timing



CAUTION: Once you have saved your incentive program, you *cannot* edit timeframe or frequency. If you create an incentive program with these incorrect, you must delete the program and create it again.

3.1 Indicate an incentive type; choose one.

- a. **Time limited**—the incentive program allows users to receive a reward only once during the program’s timeframe.
- b. **Ongoing**—the program is ongoing, and rewards are given out at a defined frequency (monthly, quarterly, etc.).
- c. **Variable end date**—the end date of the program is customized for each user. Type in the number of program days available to the user after s/he has logged the first eligible trip, rather than a tracking end date.
- d. **Repeated levels**—the program requires network members to use defined modes for a specified number of times, regardless of how frequently or infrequently they log the trips (provided the program has not ended).

3.2 Enter the **date that the program should become visible** to users (mm/dd/yyyy). Users cannot see the incentive and cannot submit requests for rewards before this date.

3.3 Enter the **last date for showing** the program to users (mm/dd/yyyy).

3.4 Enter a **tracking start date** (mm/dd/yyyy). This date can be earlier than the program visibility date.

3.5 Enter a **tracking end date** (mm/dd/yyyy). Trips logged after this date do not count toward the program reward.

4. Skip external form integration (initially)

To enable the External Form Integration feature, you must first create the incentive program. You can then return to edit the incentive and complete this feature.

5. Assign reward(s)

In the **Reward** box, select the reward(s) that will be given out for this program. If you select multiple rewards, users may choose among them when they have met the program's criteria.

6. Upload an image

Click **Browse** to upload an image to accompany the program description. This file must be in a .jpg, .tif, or .bmp image format and no larger than 120x120 pixels.

7. Enter helpful notes

Type in **Notes** for users, such as modes they must use, whether rewards will be offered on a first-come, first-served basis, the timeframe for submitting requests, or the date winners will be announced.

8. Select network(s)

If you make no changes within the **Select Networks** box, all your subnetworks will be included.

If you want to involve only a subset of subnetworks in your program, place the desired subnetworks into the Selected Networks box:

8.1 Click on a **network name** under Eligible Networks and then click the >> **arrows** to insert it into the Selected Networks box.

8.2 Search for subnetworks within a list by typing keywords into the Name box and clicking **Search**. Then click on the **network name** and click the >> **arrows**.

8.3 Remove a selected network by clicking on its **name** in the Selected Networks box and then clicking the << **arrows**.

8.4 Click **Enable Program**.

8.5 Click **Return to Benefits Main Page**.

9. Users view the incentive program

On the date you selected for showing the program to users, they will be able to go to **Rewards > Incentive Programs** in their account and see the following information listed:

- The Incentive Program title
- Program sponsor (your network)
- Program expiration date
- Dates between which trips/miles/days must be logged
- The number of trips/miles/days required
- Their own achievement (number) in meeting that requirement
- The list of required modes
- The required trip purpose(s)
- The additional Notes you input
- A colored bar showing the percentage of their progress toward meeting the requirements
- A Submit Request button if you chose to show a request link for the reward. (Otherwise, users see the message, “You will be entered in the incentive program once you have reached 100%. This reward may not be requested explicitly.”)



Managing an Incentive Program/Distributing Rewards

Once your program has begun, it will be listed in the **Incentive Programs** box, from which you can access functions to process incentive requests and manage the distribution of rewards.

A. Access incentive management

1. Within your network, select **Benefits** from the navigation bar.
2. Choose **Past**, **Current**, or **Future** from the drop-down menu above the Incentive Programs box.
3. Click **Manage Incentive** next to the appropriate incentive program.

B. Configure a template for approval and rejection emails

The *SmartRideshare* system sends a default email to users, to which you add customized information, when you approve or reject their participation status on the Incentive Eligibility List. (When you approve/reject their status, you are able to choose not to send the email.)

1. Access the **Manage Incentive** functions for the appropriate incentive program.
2. Click the link **Configure Approve/Reject Email Template**.
3. Use the drop-down menu to select **Approve** or **Reject** for an approval or rejection email.
4. Type your message.
5. Click **Save**.
6. Click **Go back to Manage Incentive**.

C. Check the list of users who qualify

The **List of Users That Qualify** contains users who have met the eligibility criteria for the program but are not yet on the Incentive Eligibility List, either because you configured the program to omit the Submit Request button or because they have not clicked their Submit Request button. Use this function to add those users to the Incentive Eligibility List.

1. Access the **Manage Incentive** functions for the appropriate incentive program.
2. Click the link **List of Users That Qualify**.
3. For incentive programs configured as ongoing, use the drop-down **Timeframe** menu to process requests for the **Current Period** or for the **Previous Period**.

4. Click on one of the column headings to sort the requests.
5. Click **Add** to the right of users you want added to the Incentive Eligibility List.
6. Click **Go back to Manage Incentive** to return to the program's management page.

D. Remove listed users who do not meet the program's criteria

Clicking the link **Remove Requests Not Meeting Program Criteria** instructs the system to re-check the Calendars of users on the Incentive Eligibility List. The system will remove those who no longer meet the program's eligibility criteria. It is a good idea to use this function *before* you work with the Incentive Eligibility List to approve requests.

1. Access the **Manage Incentive** functions for the appropriate incentive program.
2. Click the link **Remove Requests Not Meeting Program Criteria**.

E. Review submitted requests waiting for action

The **Incentive Eligibility List** is the list of users who are awaiting your approval so that they may collect their reward. Any user who has clicked their Submit Request button will be listed.

1. Access the **Manage Incentive** functions for the appropriate incentive program.

Below are details of the actions you can take with the Incentive Eligibility List.

2A. Choose a Timeframe

The **Timeframe** is active only for incentive programs configured as ongoing.

- a. Use the drop-down menu to process requests for the **Current Period** or **Previous Period**.

2B. Sort Requests

- a. Click on one of the column headings to sort the requests.

2C. View User Information

- b. Move the mouse over the user's **first name** link to produce a pop-up box filled with user account information.
- c. Click the user's **first name** link to travel to the user's Member and Account Details.

2D. Inspect Potential Issues

When a user makes a request, the system runs a set of rules to identify potential problems.

Accounts with no problems will have a green checkmark. Those with issues will have a yellow warning sign.

- a. Move the mouse over the **warning sign** to read a pop-up box detailing potential issue(s) related to the requester.

2E. Take Other Actions

Move the mouse over the **Down Arrow** icon to access a pop-up box offering the other actions available.

- a. Click on **Approve** to approve the request for reward collection.
- b. Click on **Reject** to decline the request for reward collection.
- c. Click on **Remove** to remove the user request for reward collection.
- d. Click on **View Trips** to see the user's trip Calendar to help you verify eligibility.
 - Select a particular month by clicking **Prev** or **Next** in the upper left. You can also click **Show All Trips** or **Show Trips for this network** in the upper right.
 - Click **Close** at the bottom when you are done with the Calendar.
- e. Click on **View Problems Report** to see details of the account issues the system found.
 - Click **Go back to Manage Incentives** when you are done with the report.
- f. Click **View Incentive History** to see a report on the user's other reward requests.
 - Click **Close** at the bottom when you are done with the report.

2F. Flag a Request

Use this feature to mark the account for follow-up action, to mark those that have already been reviewed, or for another helpful indicator to yourself.

- a. Click on the **flag icon** (it will turn red) to mark a request.

F. Approve, reject, and remove requests for reward collection

1. Access the **Manage Incentive** functions for the appropriate incentive program.

2A. Approve Requests

This approach allows you to save time by approving more than one request simultaneously

- a. Check the **box** next to First Name to select all, if you intend to approve all users on the list. Otherwise, check the **box** next to each appropriate user name in the Incentive Eligibility List.
- b. Click **Approve** above the list. This allows you to reconsider your approval and to review, edit, or enter customized content to accompany the system's email.
- c. The box **Send an email to user** is checked by default. If you uncheck that box, the system will not send an email to the selected user(s).
- d. Click **Approve** to complete the process or click **Close** to suspend the approval action.

2B. Reject Request(s)

This approach allows you to save time by rejecting more than one request simultaneously.

- a. Check the **box** next to First Name to select all, if you intend to reject all users. Otherwise, check the **box** next to each appropriate user name.
- b. Click **Reject** above the list. This allows you to reconsider your rejection and to review, edit, or enter customized content to accompany the system's email.
- c. The box **Send an email to user** is checked by default. If you uncheck that box, the system will not send an email to the selected user(s).
- d. Click **Reject** to complete the process or click **Close** to suspend the rejection action.

2C. Remove Requests

Note that removing a request is not the same as rejecting one. The user will not appear on any other of the lists and will not be notified. You will not be able to undo your action.

- a. Check the **box** next to First Name to select all, if you intend to remove all users on the list. Otherwise, check the **box** next to each appropriate user name in the Incentive Eligibility List.
- b. Click **Remove** above the list.
- c. A window appears allowing you to reconsider your removal.
- d. Click **Okay** to remove or **Cancel**.

G. Review and undo rejected requests

You can review a list of users whom you have rejected for reward collection, and you can undo a rejected request, placing it back onto the Incentive Eligibility List.

1. Access the **Manage Incentive** functions for the appropriate incentive program.

2. Click the link **Rejected Requests**.
3. For incentive programs configured as ongoing, use the drop-down **Timeframe** menu to process requests for the **Current Period** or for the **Previous Period**.
4. Click on one of the column headings to sort the requests.
5. Click **Undo Reject** next to the appropriate name. The name will immediately reappear on the Incentive Eligibility List.
6. Click **Go back to Manage Incentive** to return to the program's management page.

H. Review approved requests that are pending user reward selection

If more than one reward is offered for an incentive program—whether external, electronic, or both—users whose requests you have approved must click their Request Reward link to choose one. Until they click Request Reward, their name will appear on the list of **Approved Requests Pending User Selection**. Use this function to see a list of users who have not clicked their Request Reward button, send them reminder emails, and eventually cancel their ability to collect (forfeit) a reward.

A. Addresses for Reminder Emails

1. Access the **Manage Incentive** functions for the appropriate incentive program.
2. Click the link **Approved Requests Pending User Selection**.
3. For incentive programs configured as ongoing, use the drop-down **Timeframe** menu to process requests for the **Current Period** or for the **Previous Period**.
4. Click on one of the column headings to sort the requests.
5. Click the link **Click here to get a mailing list for the below users**. Copy the list into an email to remind users to go to their account and select a reward or to warn users that failure to select a reward within a particular timeframe will result in forfeiture of that reward.

B. Reward Forfeiture

1. Access the **Manage Incentive** functions for the appropriate incentive program.
2. Click the link **Approved Requests Pending User Selection**.
3. For incentive programs configured as ongoing, use the drop-down **Timeframe** menu to process requests for the **Current Period** or for the **Previous Period**.
4. Click on one of the column headings to sort the requests.

5. Click **Mark as forfeit** next to the appropriate name.
6. Click **Go back to Manage Incentive** to return to the program's management page.

I. Review approved reward requests that you have not yet fulfilled

The list of **Approved Requests Not Yet Fulfilled** concerns *external rewards only*. Users appear on your list who 1) have been approved for a program offering multiple rewards that include at least one external reward but have not yet chosen a reward, or 2) have been approved for a program with just one, external reward. When you hand out, mail, or otherwise provide an external reward to a user, you can use this function to track your fulfillment of the reward.

A. Electronic Rewards

As soon as you approve a user for a program offering one, electronic reward, the system considers that reward “fulfilled” and automatically decreases the reward instances available. Therefore, the user never appears on the list of Approved Requests Not Yet Fulfilled. For similar reasons, if you offer a selection of only electronic rewards, users will never appear on that list. However, if your program's multiple offerings include at least one external reward, users will appear on the list of Approved Requests Not Yet Fulfilled until they select an electronic reward.

B. External Rewards

1. Access the **Manage Incentive** functions for the appropriate incentive program.
2. Click the link **Approved Requests Not Yet Fulfilled**.
3. For incentive programs configured as ongoing, use the drop-down **Timeframe** menu to process requests for the **Current Period** or for the **Previous Period**.
4. Click on one of the column headings to sort the requests.
5. Click **Mark as fulfilled** next to the user to whom you have delivered the reward. The **Select Reward** box will pop up allowing you to note which reward you have given.
6. Click **Continue** to complete the process or **Close** to discontinue the action.
7. Click **Go back to Manage Incentive** to return to the program's management page.

J. Take back unused electronic redemption codes

If a user does not click View Redeem Instructions for the electronic reward within the configured timeframe, you can choose to take back the redemption code in order to reward it to another eligible user. (See the quick instruction for Managing Rewards—Electronic or the section on Managing Rewards in Chapter 8 of the Administrator's Manual.)

Conducting a Prize Drawing through an Incentive Program

One advantage of using the incentive program for prize drawings, rather than the dedicated Prize Drawing function, is that it is easier to draw multiple names at one time.

1. Configure the rewards

- 1.1 As with any incentive program, you must first configure the rewards. Do this as you would for any incentive program. (See the quick instruction sheets on configuring external or electronic rewards, or see Chapter 8: Managing Incentive Programs in the Network Administrator's Manual.)

2. Configure the incentive program

Configure the incentive program as you would any other, except choose to omit the Submit Request button so that people who meet the incentive program's eligibility criteria show up on the List of Users That Qualify but not on the Incentive Eligibility List. (See the quick instruction sheet Configuring an Incentive Program or Chapter 8 in the Administrator's Manual.)

- 2.1 When you set up the incentive program, select **No** for indicating whether to show a request link (Submit Request button) to users.

3. Conduct the prize drawing

- 3.1 Within your network, select **Benefits** from the navigation bar.
- 3.2 Choose **Past**, **Current**, or **Future** from the drop-down menu.
- 3.3 Click **Manage Incentive** next to the appropriate incentive program.
- 3.4 Click the link **List of Users That Qualify**.
- 3.5 For incentive programs configured as ongoing, use the drop-down **Timeframe** menu to work with users eligible for the **Current Period** or for the **Previous Period**.
- 3.6 In the **Select users at random** box, enter the **number of users** for the program to randomly select as prize winner(s).
- 3.7 Click **Add**.
- 3.8 Click **Go back to Manage Incentive** to return to the program's management page.

The selected user record(s) is added to the Incentive Eligibility List. Unselected records remain on the List of Users That Qualify.

4. Process the prize winner(s)

- 4.1 Process the prize drawing winner(s) from the Incentive Eligibility List just as you would others who meet incentive program criteria. (See the quick instruction sheet Managing an Incentive Program/Distributing Rewards or Chapter 8 in the Administrator's Manual.)



Discontinuing and Removing an Incentive Program

Discontinuing an incentive program ceases your ability to edit it and prevents users from submitting requests for eligibility. You can also remove an incentive program entirely from the system.

A. Discontinue an incentive program

You can discontinue an incentive program only if

- all eligible users have been cleared from the Incentive Eligibility List (that is, you have approved or denied all requests for eligibility) and
- all users have selected their reward or you have fulfilled or forfeited all outstanding rewards.

1. Within your network, select **Benefits** from the navigation bar.
2. Choose **Past**, **Current**, or **Future** from the drop-down menu.
3. Click **Edit Incentive** next to the appropriate incentive program.
4. Click **Discontinue Incentive** at the bottom of the page.
5. Click **OK** at the prompt, “Are you sure you want to discontinue this incentive program?”
6. Click **Continue** at the next message box.

B. Remove an incentive program

You cannot remove an Incentive Program unless it has met the criteria for discontinuation.



Run all reports associated with the program before you remove it because removal will cause all data about the program to be lost.

1. Within your network, select **Benefits** from the navigation bar.
2. Choose **Past**, **Current**, or **Future** from the drop-down menu.
3. Click **Remove Incentive** next to the appropriate program to permanently remove the listing from your Incentive Program list.
4. Click **OK** at the prompt, “The incentive and all associated data will be deleted. Do you want to continue?”

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