

## **United States Department of Transportation**

# TRANSIT BENEFIT PROGRAM APPLICANT GUIDE

Submitted by

### TRANServe

A division of the

### **Office of the Secretary of Transportation**

### **U.S. Department of Transportation**

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#### **OVERVIEW** 1.

#### 1.1 Background

The Department of Transportation, Transportation Services Division (TRANServe), administers the Parking and Transit Benefits program. This system will serve as the publicly accessible interface for managing Transit benefits. TRANServe Services include purchasing and distributing transit fare media through the TRANServe Debit Card via Economy Act agreements and the authority of the Administrative Working Capital Fund (49 U.S.C. 327). The office currently supports 276 Agencies and sub-divisions, proving timely and efficient transit benefit service to over 200,000 customers, 60,000 of whom use the online Transit Application.

TRANServe has redesigned the current Transit WebApplication into a "new" user friendly, mobile site designed specifically for mobile devices. The mobile version of the WebApplication has been optimized for smaller screens found on mobile phones and tablets. This will allow federal government workers to apply for the transit benefit, request information, withdraw from the program and recertify using a mobile device. Further, TRANServe TBMs, Admins, first, second, and third level approvers will be able to view, update, approve, or disapprove applications from a mobile device from anywhere and at any time.

#### 1.2 **Purpose**

The Transit Benefit Application user guide is designed to provide written instruction on how to use the application effectively and efficiently.

#### 1.3 Document Organization

The following typographical conventions are used in this user guide:

- Courier New Bold Indicates a button on a page •
- Underline Italic in blue Indicates a link within the system • •
  - Title Case plus page Indicates a name of a page in the application
- Italic text

Indicates a note on a page in the application

#### 1.4 Point of Contacts

The table below provides a list of the people you may contact for additional information regarding the Transit Application or for troubleshooting purposes.

Role	Name/Phone	Title	Email
Visit the AOC Participar	t Page for agency conta	act information:	
https://www.transportat	tion.gov/transerve/par	ticipants/united-s	states-capitol-police



# 2. ACCESSING THE TRANSIT BENEFIT APPLICATION

Follow the below steps to navigate to the Login/Register page

- 1. Open an Internet Browser.
- 2. Enter the URL: <u>www.transportation.gov/transerve</u>.
- 3. Click the *Participants* link and scroll down and select your Agency.
- 4. If your Agency requires you to complete the Transit Benefit Integrity Awareness Training; click the *New Employee Orientation* link. (Follow the instructions to complete the Transit Benefit Integrity Awareness Training).
- 5. Click the *Participants* link and scroll down to select your Agency.
- 6. Select <u>Transit Benefit Program Application System</u> link.

## 2.1 Login and Registration

Use the following steps to access the application:

 If registering for the first time, the Login page is displayed after clicking the <u>Transit Benefit Program</u> <u>Application System</u> link.

Returning applicants can enter the URL: <u>http://transitapp.ost.dot.gov</u> to display the Transit Application login page is displayed.

epartment of Transportation		TRANSERV Business in motio
* indicates required field.		
Login		
'User Name:	Government Email Address	
'Password:	Enter password	
	Log In Forgot Pass	word?
	Not registered yet? Register	
	"WARNING" WARNING"	
	You are accessing a U.S. Government information system, which includes the compare- network on which is a connected all inclusion compares connected to be networks, and a stronge medial connected to this compare of other compares connected to be networks, and a stronge medial connected to this compare of other compares connected to this information system is provided for U.S. Government use only. Usuar/Interest or improve use of the information may result in discriptionary action, as well as cut and criminal penalties. By using this information system you consent to the fatbraing:	Î
	<ol> <li>You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system.</li> </ol>	~
	"WARNING" WARNING" WARNING"	

Figure 1: Transit Application Log In page

First time users will need to register. Use the following steps to register a username:

- 2. Click the **Register** button. The Register Account Information page is displayed.
- 3. Enter your government issued email address in the User Name textbox.
- 4. Complete the registration form.

Note: \* indicates required field.

**Note:** The agency used in the email for the username will determine the agencies displayed in the Agency dropdown list.

Register Account I	nformation
'User Name:	Government Email Address
"First Name:	First Name
Middle Name:	Middle Name
"Last Name:	Last Name
*Agency/Mode:	VA ~
	Agency options will show once your Government Email Address has been validated
Phone Number:	
	Register Reset Cancel

Figure 2: Register Account Information page



5. Click the **Register** button.

Register Account I	nformation	
"User Name:	kimberty.j.gravestest@va.gov	
'First Name:	Kimberly	
Middle Name:	L	
'Last Name:	Graves	
*Agency/Mode:	VA 🗸	
	Agency options will show once your Government Email Address has been validated	
Phone Number:	(202) 555-4632	
	Register Reset Cancel	

#### Figure 3: Completed Registration page

6. The Login page is displayed with the confirmation message at the top of the page.

kimberly.j.gravestest@va.gov is now Registered
Thank you. The Login Password has been sent to kimberly.j.gravestest@va.gov.

Figure 4: Registration Confirmation

After the participant has registered an email will be sent containing a temporary password. Retrieve the password and log into the application using the following steps:

- 7. Enter the username in the User Name textbox.
- 8. Enter the retrieved password in the Password textbox.
- 9. Click the **Log** In button.
- 10. The Change Password page displays.

Login	
'User Name:	kimberly j gravestest@va gov
*Password:	
	Log In Forgot Password?
	Not registered yet? Register
	"WARNING" WARNING"
	You are accessing a U.S. Government information system, which includes this computer, the computer network on which it is connected, and diref compares connected to this reknow, and al strong emergina connected to this computer or other compares on this network. This information system is provided for U.S. Government use only. Unautrotocod or improve use of this information present in discliptinary action, as well as chill and criminal penalties. By using this information system is you consent to the following:
	<ol> <li>You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system.</li> </ol>
	"WARNING "WARNING"

Figure 5: Login page



### 2.2 Change Password

After logging into the application for the first time, it is required that you change the password to something that you will easily remember. Use the following steps to change your password:

.

- 1. Enter the retrieved password in the Current Password textbox.
- 2. Enter your new password in the Create New Password textbox.
- 3. Reenter your new password in the Confirm New Password textbox.
- 4. Enter a hint, something that will remind you of your password in the Create a Hint textbox.
- 5. Click the **Submit** button.

#### Note: \* indicates required field.

**Note:** Ensure that your password meets the system requirements when changing your login credentials. These requirements are displayed at the bottom of the Change Password page.

The confirmation message is displayed at the top of the Login page.

**Note:** You can change your password at any time by using the above steps after clicking the Change Password button on the Home page. The Change Password page can also be accessed from the Utilities dropdown menu located on the Menu bar at the top of the Home page.

**Note:** To access the additional Utilities menu options from a mobile device; click the additional menus button at the top of the page. Click the Utilities dropdown arrow to display the sub-menus.

*Current Password:	Current password	
*Create New Password:	New password	
"Confirm New Password:	Confirm New password	
*Create a Hint:	Hint	
	A hint is a meaningful personal association to help you remember your password.	
	Password must be at least 12 characters long No password character may be repaided more than 1 time(s) in sequence Password must contracters (m and used at of the following categories. • Uppercase characters (n knowp) z) • Lower care characters (n knowp) z) • Non-alphatech characters (or knowp) z) • Non-alphatech characters (or knowp) z) • Non-alphatech characters (or knowp) z) • Reserved will expire 60 days after being sel Passwords cannot be resed within the last 24 changes.	
	You will be redirected to the login page and will need to login with your new password	

Figure 6: Change Password page

Your Password has been successfully changed. Use your Username and New Password to login to the system.



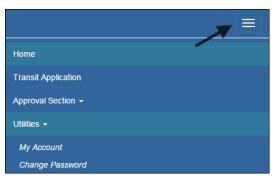


Figure 8: Utilities Menu Options



### 2.3 Password Recovery

Use the following steps to recover your password:

- From the Login page; click the <u>Forgot Password?</u> link. The Forgot Password page displays.
- The Show Hint section allows the user to view the Hint entered when the password was changed. Enter the username and click the Show Hint button.
- The Forgot Password page is redisplayed with the Hint and allows the user to log in from this page.
- 8. The Send It By Email section allows the user to retrieve a temporary password through email. The password will be sent to the email address entered when the account was created. Enter your username and click the **Submit** button.

Note: \* indicates required field.

Forgot Password	
Show Hint	
'User Name:	Government Email Address
	Show Hint
Send It by Email	
"User Name:	Government Email Address A temporary password will be sent to your E-Mail Account.
	Submit

### Figure 9: Forgot Password page

	Your hint is displayed below. Please Login.
* indicates required field.	
Forgot Password	1
Login	
*User Name:	kimberly.j.gravestest@va.gov
*Password:	Enter password
	Hint: Sunday/low52
	Log In

#### Figure 10: Show Hint

• The Login page displays. Enter the username and the retrieved password. Follow the instructions in **Section 2.2 Change Password** to change the password.

# 2.4 My Account

The My Account page allows the user to update personal information.

Use the following steps to update your personal information:

1. From the Home page; click the **My** Account button. The Update My Account Information page displays.

The information entered when the account was registered is pre-populated in the fields. Update the information as needed.

'User Name:	kimberty.j.gravestest@va.go				
oser Name.	Killiberty.j.gravestestigva.go	,v			
"First Name:	Kimberly	Middle Name:	L	'Last Name:	Graves
"Agency/Mode:	VA	~			
	Agency options will show once Address has been validated	e your Government Email			
Phone Number:	(202) 555-4632				
Role:	Applicant				

Figure 11: Update My Account page



2. Click the **Update** button. The modified account information is saved and the Home page is displayed with a confirmation message at the top of the page.

**Note:** To access the additional Utilities menu options from a mobile device; click the additional menus button at the top of the page. Click the Utilities dropdown arrow to display the sub-menus.

**Note:** You can update your account information at any time by using the above steps after clicking the My Account button on the Home page. The My Account page can also be accessed from the Utilities dropdown menu located on the Menu bar at the top of the Home page. User kimberly.j.gravestest@va.gov has been Updated

Figure 12: Update My Account Confirmation

Home	
Transit Application	
Approval Section -	
Utilities -	
My Account	
Change Password	

Figure 13: Utilities Menu Options

### 2.5 Session Time Out

If your session is inactive (i.e., you have not typed data into an existing page, requested a new page, submitted data, etc.) for 45 minutes, you will be automatically logged out.

### 2.6 Exit

- To exit the system from a desktop, click the **Logout** button on the PTBW home page.
- To exit the system from a mobile device, click the additional menu button = at the top of page. Click the Logout button. The Login page is displayed.



# 3. OVERVIEW OF THE PTB PUBLIC WEBSITE HOME PAGE

The tabs and links available to you on the PTB Public Website home page are determined by your assigned user role. User roles are assigned by the system administrator.

The Parking and Transit Benefit Public Website home page is divided into two sections:

- The menu bar displays at the top of the page and displays the following:
  - Home Click this tab to display the home page.
  - Transit Application Click this tab to display the Select an Action To Continue page.
  - Utilities Click this tab to display My Account and Change Password sub-menu options. If you have access to agency reports the Agency Reports option will display here.
  - Logout Click this tab to logout of the application.
- The main section of the home page displays buttons representing functions you can execute within the application.
  - Transit Benefit Application Click this button to display the Select an Action To Continue page.
  - My Account Click this button to display the Update My Account Information page.
  - Change Password Click this button to display the Change Password page.
  - Agency Reports There are two types of agency reports. Daily Agency Reports and Monthly Agency Reports. These options are only displayed when assigned by an administrator. Click this button to display the Agency Reports page.



Figure 14: PTB Public Website Home page

**Note:** To access the additional menu options from a mobile device; click the additional menus button at the top of the page. The additional menu options are displayed.



Figure 15: Additional Menu Options



# 3.1 Transit Benefit Application

The Transit Benefit Application option allows the applicant to request information, withdraw from the program, make SmarTrip ® changes, and certify/enroll in the transit benefit program, and submit monthly certifications.

S

 From the Home page; click the **Transit Benefit Application** button. The Select an Action to Continue page displays.

**Note:** *The Request Information radio button is selected by default.* 

mployer: Depar	rtment of V.A.	
Certify/Enr	oll/Change 😏	
O SmarTrip C	Change 😡	
<ul> <li>Withdraw fr</li> </ul>	rom the Program <table-cell></table-cell>	
Request In	formation 🕤	

Figure 16: Select an Action to Continue page

### 3.1.1 Certify/Enroll

The Certify/Enroll option allows the applicant to enroll in the transit benefit program by submitting an application. Use the following steps to certify/enroll in the Transit Benefit Program:

- 1. From the Select an Action to Continue page; click the Certify/Enroll radio button.
- 2. Click the **Continue** button. The Warning page is displayed.
- After reading the message; click the I Agree button. The Transit Benefit Application Worksheet is displayed.

**Note:** If the applicant does not agree, click the I Do Not Agree button to display the Select an Action to Continue page.

	WARNING !
	ens a matter within the jurisdiction of an agency of the United States. Making a fabe, fictilious, or flaudulent certification may constitute criminal violation 16, United States Code, Section 1001, by Imprisonment up to five years and fires up to \$10,000 for each offense, and/or agency disciplinary actions up to an
- I certify that I	am employed by the U.S. Federal Government
- I certify that I	am not named on a federally subsidized parking permit with any other federal agency.
	am eligible for a public transportation fare benefit, will use it for my daily commute to and from work by public transit or ill not give, sell, or transfer it to anyone else.
per month on p	any given month, I will not use the Government-provided transit benefit in excess of the statutory limit. If my commuting costs ublic transit exceed the month statutory limit, then I will supplement those additional costs with my own funds rather than use provided transit benefit designated for use in a future month.
out of work due	will not claim the transit benefit in excess of my actual monthly commuting expense. If at anytime during a given month I am to sickness, vacation or any other reason, on official travel, or use a private vehicle for commuting. I will claim less and adjust my transit benefit the following month if appropriate.
- I certify that n	ny parking fees are not included in the computation of the daily, weekly or monthly commuting costs for my transit benefit.
	I Agree I Do Not Agree



- 4. Select the reason for certification.
  - Annual Certification/Recertification
  - ♦ Change
  - New Transit Benefit Participant – This is the only available reason for newly registered participants.
- 5. Selection defaults to **Civilian**. Select your Employment Type.
- 6. Selection defaults to **Full Time**. Select your work status.

Note: \* indicates required field.

**Note:** *The identifier label can be renamed or hidden by the Agency TBM.* 

**Note:** Some agencies require the applicants to complete integrity training. If this is required; a checkbox will be displayed when the Annual Certification/Recertification or New Transit Benefit Participant reasons are selected.

**Note:** Your Name, Email Address, Work Phone, and Agency/Mode are pre-populated with the information you entered when you registered. Verify that the information is correct.

Certify/Enroll					
G Transit Benefit Application W					
	orksheet				
All Transit Benefit Program Applicants	s are required to certify the "Total Monthly Ex	xpense" of their Home to Work.	Mass Transit Commute		
Parking fees are not eligible for the	transit benefit and must not be included in	n "Total Monthly Expense".			
Instructions: To calculate your "Total					
<ul> <li>a. Select your transportation meth</li> <li>b. Enter the following information i</li> <li>i. Name of Company for your</li> </ul>	rod(s) in the "To Work" and "From Work" row(s) of e our method of transportation (Metro, BART, Su	ach transportation method: ubwavi			
<ol> <li>Daily or Monthly Expense iii. Number of days you rout</li> </ol>	e inely work in a month s, divide the price of the pass by 2, and enter t				
d. The Total Monthly Expense val	ue automatically populates	ne information in the Monthly E2			
'Reason for Certification				·	
Civilian/Military: Work State				·	
G Transit Benefit Transportation	Methods				
Aways follow your Agency work sche Defined work schedule examples:	dule policy for specific guidance on the Days	per Month entry.			
- If you work a Basic schedule of	8-hours per day, the average amount of 20 D 9-hours per day, the average amount of 18 Da	Jays can be entered into the Day ays can be entered into the Day	ys per Month column s per Month column		
<ul> <li>If you work a Compressed sche</li> <li>If you telecommute or work part</li> </ul>	9-hours per day, the average amount of 18 Da adule of 10-hour days, the average amount of t time, enter the number of days you actually of	16 Days can be entered into the commute to/from work.	e Days per Month column		
		transportation methods:	_		
	Bus Other Bus R	Rail Other Method Vanpo	ol -		
Every Transit Benefit Program Part month to reflect the actual cost of f	licipant is responsible to adjust the amoun their home to work commute.	it of their transit benefit each	Total Monthly Expen	sec S	
G Transit Benefit Program Appl					
"Identifier:					
Nar	ntc SHEPARD (Last)	HANK (First)	V (Middle	)	
Email Addre	stc hank shepardtest@va.gov		"Work Phone: 9 202-5!	55-7854	
Common Identifier	:0				
Department of V.A.					
*Select Your Agency:	• VA 🗸	<ul> <li></li> </ul>	*Region: 📀	~	
"Admin:			~		
	Populates from Select Your Agency Please select Admin				
Accounting Code:	-0		Colort		
Accounting Code	Click the Select button to select Accou	unting Code	UNU POCK		
Routing Symbol:			Select		
Location/Building	Click the Select button to select Routin	ng ayinbu	Calact		
	Click the Select button to select Locat	tion/Building			
	I certify that my usual monthly Transit	t commuting costs are: 🕄		\$	
	This field is automatically calculated				
nformation					
"Work Address:	Work Address				
"Work Zip:	Work Zip				
		Work States	v		
"Work Zip: "Work City:	Work Zip Work City	"Work State:	~		
		"Work State:	>		
'Work City:		"Work State:	~		
"Work City:	Work City	Work State:	<b>v</b>		
"Work City:	Work City Address	"Work State:	<b>`</b>		
"Work City: ince information "Address: "Zip:	Wesk City Address Address 2 Zip				
"Work City: Ince Information "Address:	Work City Address Address 2	"Work State:	۷ ۷		
"Work City: ince information "Address: "Zip:	Wesk City Address Address 2 Zip				
Work City; ince Information *Address: *Zip; *City;	Wesk City Address Address 2 Zip	*State:			Select
Work City: Ince Information *Address: -'Ziy: -'City: erer Information *Approving Official: •	Work CDy Address Address 2 Zo City City Select Citck the Select button to select	*State:	♥ Iger/Fund Certifiet: ♥	Click the Select button to sele	
Work City: Ince Information *Address: -'Ziy: -'City: erer Information *Approving Official: •	Work City       Address       Address 2       Zip       City       Stelect.	*State:	♥ Iger/Fund Certifiet: ♥	_	
Werk City: Ince Information *Address: - 'Zip: - 'City: - 'Lip: - 'Point of Contect: 0	West City Address Address Address 2 Zip City City Select City Select Select button to select Approving Official Select.	*State:	♥ Iger/Fund Certifiet: ♥	Click the Select button to sele	
Werk City: 	Work City       Address       Address 2       Zip       City       City       City the Select button to select       Approving Official	*State:	v ger/Fand Certifier: €	Click the Select button to sele	
Werk City: 	Work City           Address           Address 2           Zp           City           City           City           Select           Quest           Select           City           Select           City	*State:	v ger/Fand Certifier: €	Click the Select button to sele	
Work City: Ince Information 'Address: 'Zip: 'City: 'Legroving Official: • 'Point of Contact: •	Work City           Address           Address 2           Zp           City           City           City           Select           Quest           Select           City           Select           City	*State:	v ger/Fand Certifier: €	Click the Select button to sele	Select
Werk City: 	Work City           Address           Address 2           Zp           City           City           City           Select           Quest           Select           City           Select           City	*State:	v ger/Fand Certifier: €	Click the Select button to sele	
Work City: Ince Information 'Address: 'Zip: 'City: 'Legroving Official: • 'Point of Contact: •	Work City           Address           Address 2           Zp           City           City           City           Select           Quest           Select           City           Select           City	*State:	v ger/Fand Certifier: €	Click the Select button to sele	
Werk City: 	Work City           Address           Address 2           Zp           City           City           City           Select           Quest           Select           City           Select           City	*State:	v ger/Fand Certifier: €	Click the Select button to sele	
Werk City: 	Work City       Address       Address 2       Zip       City       City       City       City       Select       City	*State:	v ger/Fand Certifier: €	Click the Select button to sele	

Figure 18: Transit Benefit Application Worksheet



### **Commuting Distance**

- If the Agency is tracking the commuting distance, the **Is your commute greater than 2hrs?** field will be displayed.
- If the commuting distance is greater than two hours, select Yes. The Is your primary address the same as your commuting address? field is displayed.
- If the primary address is different from the commuting address, select No.
   The Commute Address section is displayed. Enter the address where the commute starts, for instance a commuter bus pick-up location.

Is your commute greater than 2hrs? 😣	Yes			~	
Is your primary address the same as your commuting address? 😡	No			~	
Commute Address					
*Commute Address: 📀	Commute Address				
Commute Address2:	Commute Address 2				
"Commute Zip:	Commute Zlp				
"Commute City:	Commute City	"Commute State:	~		



7. Select your transportation method(s).

Other Bus

Rail

♦ Bus

Bus to Work:		\$		s
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Bus from Work:		\$		S
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Bus to Work:		\$		S
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Bus from Work:		\$		S
	Name of Company	Daily Expense	Days per Month	Monthly Expense
very Transit Benefit Program Participar				

#### Figure 20: Bus Method

 Other Bus to Work:
 S
 S

 Name of Company
 Daily Expense
 Days per Month

 Other Bus from Work:
 S
 S

 Name of Company
 Daily Expense
 S

 Other Bus from Work:
 S
 S

 Name of Company
 Daily Expense
 Days per Month

 Name of Company
 Daily Expense
 Days per Month

fit Program Participant is responsible to adjust the a actual cost of their home to work commute.

#### Figure 21: Other Bus Method

amount of their transit benefit each



#### Figure 22: Rail Method



Total Monthly Expense: \$ 0.00

Total Monthly Expense: \$ 0.00

Total Monthly Expense: \$ 0.00

- Other Method
- Other Method to Work
   S
   S

   Other Method to Work
   S
   Daily Expense
   Daily Expense

   Other Method from Work
   S
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   Daily Expense

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   Dealy Method from Work
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   Daily Expense

   Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their commune.
   Total Monthly Expense:
   S 0.0

   Figure 23: Other Method
   S
   Daily Expense
   S 0.0

- ♦ Vanpool
- Parking

**Note:** The Agency must be set up to track parking costs. The Parking cost is separate from the Transit cost and is not calculated together.

**Note:** If all of the methods of transportation are selected, all of the methods will display in one table.

**Note:** When filling out the method of transportation table, be sure to follow your Agency's work schedule policies.

8. Fill out the selected method of transportation table for every selected method (i.e. Bus and Rail)

**Note:** Some agencies require additional transportation information. If this is required; a textbox will be displayed below the Name of Company field. The additional info label can be renamed by the Agency TBM.

**Note:** The Monthly Expense and the Total Monthly Expense is automatically calculated when you enter the Daily Expense and the Days per Month.

> 9. If the Agency allows the participant to be funded over the current mass transit statutory limit, radio buttons will be displayed giving the customer the option to pay taxes on the exceeded amount.





le to adjust the amount of their transit benefit each

onsible to adjust the amount of their transit benefit each

Figure 25: Parking Method

Always follow your Agency work schedule policy for specific guidance on the Days per Month entry

Defined work schedule examples:

• If you work a Basic schedule of 8-hours per day, the average amount of 20 Days can be entered into the Days per Month column

- If you work a Flex Schedule of 9-hours per day, the average amount of 18 Days can be entered into the Days per Month column
   If you work a Compressed schedule of 10-hour days, the average amount of 16 Days can be entered into the Days per Month column
- If you telecommute or work part time, enter the number of days you actually commute to/from work.

#### Figure 26: Sample Agency Work Schedule Policies

		\$ 2.10	16	\$ 33.60
	Name of Company	Daily Expense	Days per Month	Monthly Expense
	WMATA			
	Additional Info 😔			
Bus from Work:	BFW	\$ 2.10	16	\$ 33.60
	Name of Company	Daily Expense	Days per Month	Monthly Expense
	WMATA			
	Additional Info 😌			

Figure 27: Method of Transportation Table

I acknowledge my commuting costs are above the current \$130.00 tax free limit and fully understand I will be responsible for paying taxes on the amount I use that exceeds the current tax free limit.

 $\bigcirc$  I do not want my monthly funded commuting benefit to exceed the current Transit statutory tax free limit

Transit Statutory Limit Radio Buttons

- 10. Enter the Identifier. This field is used to uniquely identify the applicant.
- 11. Enter the Common Identifier. Depending on the agency, the Common Identifier can be a debit card activation keyword or number.

**Note:** *The common identifier label can be renamed by the Agency TBM.* 

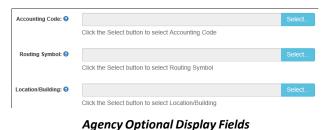
- 12. Select your Region.
- 13. Select your Admin.
- 14. Depending on the Agency, three optional fields may be displayed (i.e. Accounting Code, Routing Symbol, and Location/Building). Click the Select link to display the available list for your agency.

**Note:** *The optional field labels can be renamed or hidden by the Agency TBM.* 

- 15. Enter your Work Information.
- 16. Enter your Residence Information.
- 17. Click the **Select** button to display the list for your agency's approving officials (1<sup>st</sup> Approver).
- Select your Approving Official (1<sup>st</sup> Approver).

**Note:** If your agency is set-up for Single Approver – First Approve, this will be the only available option.

- Click the Select button to display the list for your agency's manager/fund certifiers (2<sup>nd</sup> Approver).
- Select your Manager/Fund Certifier (2<sup>nd</sup> Approver).



roving Official		
Name	Email	
Type to filter		
HARRY CAREY	harry.carey@treas.gov	
	<<	
		Clos

#### Figure 28: Approving Official

Name		Email	
Type to filter			
DARREN CHANG		darren.chang@ed.g	IOV
HARRY CAREY		harry.carey@treas.	gov
	< < 1	> >>	
			С



- 21. Click the **Select** button to display the list for your agency's point of contacts.
- 22. Select your Point of Contact.

**Note:** *If your agency is set-up for Single* Approver – Program Admin (3<sup>rd</sup> Approve), only a selected POC is required.

Note: The approver and POC field labels can be renamed by the Agency TBM.

> 23. Enter your SmarTrip® card information. If you have not purchased or do not use a SmarTrip® card, enter NA. See <u>Appendix A – SmarTrip®</u> Card Instructions.

#### Note: This field is only valid for DC, MD, and VA participants.

24. Enter any information that will assist your Agency Approver with processing your application in the Comment for Agency Approvers textbox.

**Note:** *Work and Residence addresses are* verified via the USPS database. Enter the street address and then the zip code. The City and State are auto populated.

### 25. Click the **Continue** button.

Note: If a smartrip card number was entered in the Smartrip Card Number field, the SmartBenefits® Program page is displayed.

	Region	Email
	~	
	DC	vikkey.owens@dot.go
<< <	1 > >>	

#### Figure 30: Point of Contact

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	*Address: "28: "City: Approver Information "Approving Official: @	Address 2 2009 WASHINGTON WASHINGTON CAREY, HARRY Select Click the Select button to select Approving Official TREASURY POC Select Contact Contact	4	Manager/Fund Certifier: 오	Click the Select button to select
	*Address: "28: "City: Approver Information "Approving Official: @	Address 2 2009 WASHINGTON WASHINGTON CAREY, HARRY Select Click the Select button to select Approving Official TREASURY POC Select Contact Contact	4	Manager/Fund Certifier: 오	Click the Select button to select
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	*Address: '2p; 'City; Approver Information 'Approving Official: @ 'Point of Contact: @ 'SmartTrip Card Number: @	Address 2 2000 WASHINGTON WASHINGTON CAREY, HARRY Select CACK the Select button to select Approving Official TREASURY POC Select Cick the Select button to select Point of Confact NA HELP ME HELP YOU	4	Manager/Fund Certifier: 오	Click the Select button to select

Figure 31: Completed Transit Benefit Application



- 26. Click the YES, I would like toenroll button to join the SmartBenefits® program. By clicking yes, you agree to have your transit benefits downloaded to your SmarTrip® card the first of every month.
- 27. Click the **NO Thank You** button if you do not want to join the SmartBenefits® program.
- 28. After clicking the **YES** or **NO** button, the application is submitted and redisplayed with a confirmation message at the top of the page.

**Note:** The informational message is only displayed when the applicant enrolls in the SmartBenefits® program.

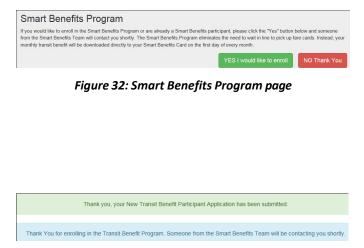


Figure 33: Transit Benefit Program Confirmation



## 3.1.2 Monthly Certification

If your Agency is participating in The Monthly Certification Program, this option will allow the applicant to recertify without having to update any participant information. There are three types of applications that will meet the requirement. These are: New Transit Benefit Participant, Annual Certification/Recertification, and Monthly Certification.

When an agency is set-up for monthly certifications the participants are required to submit a recertification based on the frequency set by the agency. This could be anywhere from once a month to once a year. When participants are added to the program, notifications are sent via email. This email will contain the status of the online account. If the account is current the email will display the date the current recertification will expire. If the account is in suspended status the email will instruct the participant to submit an application.

Reminder emails will be sent to the participant leading up to the expiration date. If the participant does not submit an application on or before the expiration date the account will be put in suspended status. If the submitted application has been disapproved and sent back to the participant, the online account will remain in suspended status until the application is resubmitted. If the account is suspended the participant will need to submit via the Certify/Enroll/Change page. The available reasons for certification are Annual Certification/Recertification and New Transit Benefit Participant. Selecting Annual Certification and submitting an application will reactive the online account. The application will need to be fully processed to finalize the reactivation. An email will be sent to the participant with the next recertification date.

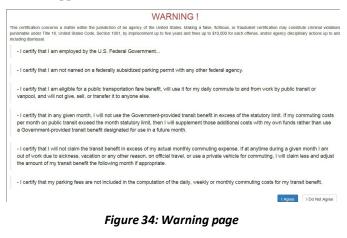
Use the following steps to submit a Monthly Certification application:

- 1. From the Select an Action to Continue page; select the Monthly Certification radio button.
- 2. Click the **Continue** button. The Warning page is displayed.
- 3. After reading the message; click the **I** Agree button. The Transit Benefit Application Worksheet is displayed.

**Note:** If the applicant does not agree, click the I Do Not Agree button to display the Select an Action to Continue page.

**Note:** The applicant must be enrolled in the Monthly Certification Program to submit a monthly certification application.

**Note:** If your agency has disabled the Monthly Certification option on the Select an Action to Continue page, recertify via the Certify/Enroll/Change page.





4. The application displayed is the current application on file. Verify that all prepopulated information is correct and valid.

**Note:** The applicant can ONLY update the method of transportation and rates when submitting via the monthly certification page.

**Note:** If the address entered when the application was initially submitted is invalid; the monthly certification will not be able to be submitted. The applicant will need to submit an application via Certify/Enroll/Change to update the address.

**Note:** If the Manager, Supervisor, or POC selected when the application was initially submitted is no longer available for selection; the monthly certification will not be able to be submitted. The applicant will need to submit an application via Certify/Enroll/Change to update the Manager, Supervisor, or POC selections.

C Transit Benefit Application Worksh					
All Transit Benefit Program Applicants are r	equired to certify the "Total Monthly	Expense" of their Hame to Work	Mass Transit Comm	ute	
Parking fees are not eligible for the trans	sit benefit and must not be include	d in "Total Monthly Expense".			
Instructions: To calculate your "Total Mont	hly Expense"				
a. Select your transportation method(s) b. Enter the following information in the 1. Name of Company for your me 8. Daily or Monthly Expense 8. Number of days you routinely c. If you purchase a Monthly pass, dwo	"To Work" and "From Work" row(s)- sthod of transportation (Metro, BART work in a month	(Subway)	opense column.		
d. The Total Monthly Expense value au Reason for Certification:					
Civilian Wiltery: Work Status:	FULL TIME				
C Transk Benefit Transportation Met	hods				
If you work 8-hour days, enter 20 in the Day fyou work 9-hour days, enter 18 in the Day fyou work 10-hour days, enter 16 in the D If you telecommute or work part time, enter	ys per Month column ays per Month column the number of days you actually cor	nmute to/from work.			
	Bus Other Bus	Rail Other Method Van	post		
Other Bus to Work:	OBTW	\$ 3.10	20		\$ 62.00
	Name of Company	Daily Expense	Days per Mo	nth	Monthly Expense
Other Bus from Work;	OBFW	\$ 3.10	20		\$ 62.00
CONT DURING HOLE	Name of Company	Daily Expense	Days per Mo	nth	Monthly Expense
Every Transit Benefit Program Participal month to reflect the actual cost of their i		unt of their transit benefit each	Total Mor	thly Expense:	\$ 124.00
🕼 Transit Benefit Program Applicatio	n				
Smart Benefits Program:	NO				
identifier:					
Name:	SHANEFELTER	CHRIS			
	(Last)	(First)			
Email Address:	chris.shanefelter@treas.gov				
Work Phone:	(202) 555-8989				
Common Identifier:	TEST		Work Zip Code:	20990	
Department of Treasury					
Agency/Mode:	TRE-HQ		Region:	DC	
Admin:	TRE-HQ-DC				
Work Information	I certify that my usual monthly Th This field is automatically calculat			\$ 124.00	
Work Information Work Address:	36 WORK PLACE				
Work City:	WORK	Work State: DC		Work Zip:	44444
				01200000	
Residence Information					
Address:	52 HOME PLACE				
City:	HOME	State: DC		Zip:	55555
Approver Information					
Approving Official:	CAREY, HARRY	Ma	nager/Fund Certifier:	DARREN CHA	NG
Point of Contact:	TREASURY POC		Manager Phone:		
SmartTrip Card Number:	845				
Comment for Agency Approvers: O					
	You have 1995 characters remain	ing			
					Continue. Cano
					Contraction

Figure 35: Transit Benefit Program Application for Monthly Certification



5. Click the **Continue** button. The application is submitted and redisplayed with a confirmation message.

Thank you, your Monthly Certification application has been submitted.

Figure 36: Monthly Certification Confirmation



Figure 38: Current Transit Benefit Account

### 3.1.3 SmarTrip® Change

The SmarTrip® Change option allows the applicant to submit a request to update a SmarTrip® card number associated with the account. Use the following steps to submit a request for a SmarTrip® number change:

- From the Select an Action to Continue page; click the SmarTrip® Change radio button.
- Click the Continue button. The SmarTrip® Change page is displayed.
- 3. Update the SmarTrip® card number.

**Note:** The applicant must be enrolled in the Transit Benefit Program to change the smartrip information. Registering a username does not mean that the applicant has enrolled in the program.

4. Click the **Submit** button. The request is sent to TRANServe for processing and a confirmation message is displayed at the top of the page.

Seneral Information			
"Identifier:			
Name:	QUINTEROTEST	BIFF	
	(Last)	(First)	
Email Address:	biff.quinterotest@fdic.gov		
Agency:	Federal Deposit Insurance Co	rporation (FDIC)	
marTrip Information			
SmarTrip Card Number: 0			



Thank you, your Address/Smartrip Change Request has been submitted.

Figure 40: SmarTrip® Confirmation



# 3.1.4 Withdraw from the Program

The Withdraw from the Program option allows the applicant to submit a request to withdraw from the program at any time. Use the following steps to withdraw from the program:

Withdraw from the Program

Approving Official

Name

Type to filter.

KIM LYONS

C

- 1. From the Select an Action to Continue page; click the Withdraw from the Program radio button.
- 2. Click the **Continue** button. The Withdraw from the Program page is displayed.
- 3. Click the pop up calendar to select a withdrawal date.

Identifier:	••••		
Name:	MILLS	SHARONDA	
	(Last)	(First)	
Email Address:	Sharonda.Mills@va.gov		
Agency/Mode:	Department of V.A. (VA)		
*12345: 😡	(202) 555-4441		
"Withdrawal Date:		Ħ	
	Click the Calendar to select a Withdrawa	al Date	
*Approving Official: 9		Select	
	Click the Select button to select Approvi	ng Official	
'Manager/Fund Certifier: 😌		Select	
	Click the Select button to select Manage	rr/Fund Certifier	
Comment for Agency Approvers: 0			
Comment for Agency Approvers: 👽			
	You have 1995 characters remaining		
			Withdraw

Figure 41: Withdraw from the Program page

Email

kim.lyonstest@va.gov

- Click the Select button to display the list for your agency's approving officials (1<sup>st</sup> Approvers).
- Select your Approving Official (1<sup>st</sup> Approvers).

- Click the Select button to display the list for your agency's manager/fund certifiers (2<sup>nd</sup> Approvers).
- Select your Manager/Fund Certifier (2<sup>nd</sup> Approver).

**Note:** If the approval functionality has been disabled by the agency the approval fields will not be displayed and the application is sent directly to TRANServe for processing.

		<<	<	1 >	>>		
							Close
	Figure 42: A	Appro	ving	Offic	ial (1	<sup>st</sup> Approver)	
Mana	ager/Fund Certifier						×
	Name				Email		
	Type to filter						
C	GLEN HARPERTEST				glen.h	arpertest@va.gov	
C	JESSICA MARTIN					a.martins@va.gov	
		<<	<	1 >	>>		
							Close

Figure 43: Manager Fund/Certifier (2<sup>nd</sup> Approver)



8. Enter any information that will assist your Agency Approver with processing your application in the Comment for Agency Approvers textbox.

**Note:** *The Comment for Agency Approvers label can be renamed by the Agency TBM.* 

9. Click the **Withdraw** button. The request is sent to TRANServe for processing and a confirmation message is displayed at the top of the page.

**Note:** The applicant must be enrolled in the Transit Benefit Program to withdraw. Registering a username does not mean that the applicant has enrolled in the program.

Thank you, your application to Withdraw from the Program has been submitted.

Figure 44: Withdraw Confirmation

## 3.1.5 Request Information

The Request Information option allows the applicant to request information from the Agency Program Office by submitting questions regarding the transit benefit program or a submitted application through the Point of Contact (POC). Use the following steps to request information:

- From the Select an Action to Continue page; click the Continue button to display the Request Information page.
- The POC selected on a submitted application will pre-populate in the Point of Contact textbox. To select a POC, click the Select button to display the available POCs in a separate window.
- 3. Select a POC from the list.
- Enter the question or concern in the Question textbox and click the Send Request button.

Request Information				
Name:	Graves	Kimberly	Jessica	
	(Last)	(First)	(Middle)	
Email Address:	kimberly.j.gravestest@dot.gov			
Agency:	Department of Transportation			
*Point of Contact: 🤤		Select		
	Click the Select button to select Point of	Contact		
"Question:				
			Send Request Ca	incel

Figure 45: Request Information page

ct			
	Region	Email	
Y POC	DC	vikkey.owens@dot.gov	
			Close
	Y POC	Region	Region Email



5. An email is sent to the selected TRANServe POC. The Home page is displayed with a confirmation message at the top of the page.

### Thank you, your request has been sent.

Figure 47: Request Information Confirmation

# 3.1.6 Disapproved Applications

Applications that have been Disapproved are sent back to the applicant. If corrections are needed the applicant can make those corrections and resubmit the application.

- From the Home page; click the **Transit Benefit Application** button. The Select an Action to Continue page displays. The reason the application was disapproved is displayed at the top of the page.
- 2. Select the Update Disapproved Application Certification radio button.
- 3. Click the **Continue** button. The Warning page is displayed.
- After reading the message; click the I Agree button. The disapproved Transit Benefit Application Worksheet is displayed.

**Note:** If the applicant does not agree, click the I Do Not Agree button to display the Select an Action to Continue page.

Your Current Application Status: Certification Disapproved Reason: TEST Disapproval	
e	
Employer: Federal Deposit Insurance Corporation	
Request Information	
O Update Disapproved Certification	
Continue	
1	

Figure 48: Select An Action To Continue page

	WARNING !
	This certification concerns a matter within the jurisdiction of an agency of the United States. Making a false, fictitous, or fraudulent certification may constitute criminal violation purchashe under Tile 10, United States Code, Section 1001, by improviment up to the years and files up to \$10,000 for each offense, and/or agency disciplinary actions up to an including dismissal.
	- I certify that I am employed by the U.S. Federal Government
Ξ	- I certify that I am not named on a federally subsidized parking permit with any other federal agency.
eet	<ul> <li>- I certify that I am eligible for a public transportation fare benefit, will use it for my daily commute to and from work by public transit or vanpool, and will not give, sell, or transfer it to anyone else.</li> </ul>
	<ul> <li>I certify that in any given month, I will not use the Government-provided transit benefit in excess of the statutory limit. If my commuting costs per month on public transit exceed the month statutory limit, then I will supplement those additional costs with my own funds rather than use a Government-provided transit benefit designated for use in a future month.</li> </ul>
ne I	<ul> <li>I certify that I will not claim the transit benefit in excess of my actual monthly commuting expense. If at anytime during a given month I am out of work due to sickness, vacation or any other reason, on official travel, or use a private vehicle for commuting. I will claim less and adjust the amount of my transit benefit the following month if appropriate.</li> </ul>
	- I certify that my parking fees are not included in the computation of the daily, weekly or monthly commuting costs for my transit benefit.
	I Agree I Do Not Agree

Figure 49: Warning page



Transit Benefit Program Applicant Guide

- The reason the application was disapproved is displayed at the top of the Transit Benefit Application Worksheet and the Transit Benefit Program Application.
- The applicant's information entered when the application was submitted is displayed in the fields. Make the noted corrections and resubmit the application by clicking the Continue button.
- Click the **Delete Application** and **Start Over** button to delete the existing application. Doing this will require the applicant to complete and resubmit a new application.

**Note:** If a Monthly Certification was disapproved, the applicant will need to click the Delete Application and Start Over button to resubmit the application via Certify/Enroll/Change to make the necessary corrections.

#### Office of the Secretary of Transportation

		Debey Application and Start Over
Control registerio de la calculation de la calculatione	and the second stated	Disapproved Reason: Last 4 SSN not entered. Please etter and resume.
Circleded equade devices   Set and right that the same structure of the "Relationed as " and lead to the same structure of th		tion Disaporound
	Transit Benefit Application Worksh	eet
<form></form>		
<ul> <li>Provide source and and a set of a certain a set of a certain</li></ul>		
************************************	E. Number of days you routinely :	work in a month Is the price of the pass by 2, and enter the information in the Monthly Expense column.
	Civilian Military: 0	DMLIAN V
And the spon dependence with the species of the spe	Work Status:	Ful Time V
And the province of the provin		
boolean and a set of		
		oky for specific guidance on the Days per Month entry.
The proceeding of the procession of	If you work a Basic schedule of 8 hor     If you work a Flex Schedule of 9-hou	ars per day, the average amount of 20 Days can be entered into the Days per Month column is per day. The average amount of 10 Days can be entered into the Days per Month column
Total protection and and a set of the set of t	If you work a Compressed schedule     If you telecommute or work part time	
Network Network   Network <td></td> <td>"Select your transportation methods:</td>		"Select your transportation methods:
Number of Company Date propose Date p		
An starting, or open of a spectra	Bus to Work:	BTW         \$ 450         15         \$ 72.00           Name of Company         Daily Expense         Days per Month         Monthly Expense
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Luei this of memory and a series of a seri		
Predict Depart Instance Corporate   • Sense the Approprie   • Sense	Email Address:	Tracey.Teston@fdic.gov Work Phone: 0 000.000.000
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Win Xg     2021       Win XG     Extraction       Win XG     Extraction       Adderse     Extraction       Value     Extraction       Extraction     Extraction       State     Extraction		
Year (c)     Year (c)		
Residence Monadana	'Work Zip:	21201
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America 2012 2012 2012 2012 2012 2012 2012 201		
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Vegening Ofdeal (0)         Ministry (Collabor)         Collabor)         Collabor         Ministry (Collabor)         Collabor         Collabor <th< td=""><td>Approver Information</td><td></td></th<>	Approver Information	
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Click the finite buffer to select Point of Curried  Sauntife Cost Randor 0  Mit  Costant for Agency Agences: 0		
Crited  Second Randow Q  Context Conte	"Point of Contact: O	Click the Select button to select Point of
Commet for Agency Approvence		Clock the Select Button to Select Home on Contact
Commet for Agency Approvence		
	"SmartTrip Card Number: 😖	NA
You have 1555 characters remaining	Comment for Agency Approven: 0	
		You have 1995 characters remaining
Contract Contract		You have 195 characters remaining Contrue: Cancel

Figure 50: Disapproved Transit Benefit Application Worksheet



# 4. AGENCY REPORTS

Use the following steps to download an agency report:

- 1. From the Home page; click the **My Account** button. The Update My Account Information page displays.
- 2. Click the applicable password request button. A confirmation message is displayed.

**Note:** If you have access to both Daily Agency Reports and Monthly Agency Reports, a password button will be displayed for each report type.

- 3. Retrieve the emailed password.
- 4. From the Home page, click the applicable Agency Report button; the agency report page displays.

**Note:** *The same steps are used to download daily and monthly agency reports.* 

5. Click the link to display the Open/Save dialog message.

**Note:** Click the Open button to display the zip file or click the Save button to choose a location to save the zip file.

6. Extract the files to a selected folder.

	Robinson, Angela - 12/02/2020 12:36:28 PM	AEST			
*User Name:	daniel.lamuff@archives.gov				
*First Name:	Daniel Mic	ddle Name:	Middle Name	*Last Name:	Lamuff
Agency/Mode:	ARCHIVES				
	Agency options will show once your Govern Address has been validated	ment Email			
hone Number:					
Role:	Approving Official Set Role to Applicant				
	The second secon				
	Hide from Approver Lists				

Figure 51: Update My Account Information page

Agency Monthly Report Password has been sent.

Figure 52: Agency Report Password Confirmation page

	U.S. Department of Transportation		
Zip Format	EXE Format		
ARCHIVES Monthly Report - Jan 2021	ARCHIVES Monthly Report - Jan 2021		

View and track your downloads	Search downloads		
Name	Location	Actions	
AGENCYMONRzip 45.6 KB	Do you want to open or save this file?	Open Save 🔻	×

#### Figure 54: Open/Save Dialog Message

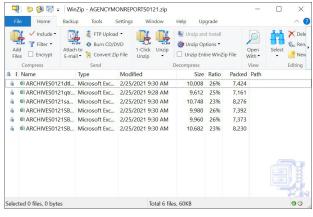


Figure 55: Zip File



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7. Enter the retrieved password and click the **OK** button.

Decrypt			$\times$
Enter password:			
Hide the password			
ОК	Cancel	Help	



8. Go to the selected folder and review the downloaded report files.

	Te Home Insert Ds															
vest ·	Clipboard %	U · I · A · J		Wrap Text     Merge & Cer	General Ser + \$ - % * 1. Number	• \$8.29	Conditional Formatting	Format at Table - Styles	Cell Styles -	lnsert	Delete Form	∑ AutoSi i Fill - at  Ø Clear -	5	ert & Find & ter * Select *		
A1		✓ fx Feb-25-	2021													
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					Feb-25-2021											
6	Administration	Number Issued	Amount Issued	YTD Num Issued	YTD Amt Issued	1										
	ARCHIVES	0	\$0.00	0	\$0.00	1										
	ITANA, JANET	0	\$0.00	0	\$0.00	1										
2				0	80.00											
0	NCR-101 - GILLTEST, CAROLYN	0	\$0.00													
0	OST-WCF M-19 - 4201001633	0	\$0.00	0	\$0.00											
0	OST-WCF M-10 - 4201001633 RODRIGLEZ, ESPIELLA	0	\$0.00 \$0.00	0	\$0.00 \$0.00											
10	OST-WCF M-10 - 4201001633 ROORIGLEZ, ESPIELLA SCHOENDO, LAURIE	0 0 0	\$0.00 \$0.00 \$0.00	0	\$0.00 \$0.00 \$0.00											
10	OST-WCF M-10 - 4201001633 RODRIGLEZ, ESPIELLA	0	\$0.00 \$0.00	0	\$0.00 \$0.00											

Figure 57: Agency Report File



# APPENDIX A: SMARTRIP CARD INSTRUCTIONS

For Smart Benefit Participants: Purchase and Register a SmarTrip® card

SmarTrip® card usage is mandatory for all participants in the National Capital Region.

- 1. Purchase a SmarTrip® Card This is a reloadable electronic fare card. Using a reloadable card supports the government's initiatives to support and improve the environment.
  - a. You can do this at a Metro Sales Store, Station Kiosk (these are located in Stations where parking is available, a Commuter Store and many retail establishments.

**Note:** Look here for more information on locations: http://www.wmata.com/fares/purchase/where.cfm

 You can also purchase a SmarTrip® Card on line: http://www.wmata.com/fares/purchase/

**Note:** An online order will require you to provide a shipping address which must match the billing address on line with your credit card provider.

- 2. Create a Personal Account to Register your SmarTrip® Card You must register your SmarTrip® card with WMATA in order to receive your transit benefit electronically. Registration may take up to 48 hours to be reflected in the WMATA system. An additional benefit of registering your card is to protect the funds on the card. If lost or stolen you may cancel the card. After you replace your SmarTrip® card, you can transfer the funds to the new card.
  - Register your SmarTrip® card here: https://smartrip.wmata.com/Registration/Register.aspx
  - You must indicate the type of card by matching the serial number on the back with the pattern that is circled below:

	this card, no further action is needed.
	XXXXXX 0167 0000 0000 0000
	WORKS. ACTION NEEDED
ook for the num	erals 0167 in the position shown above. All other card types show
	below must be replaced.
	· · · · · · · · · · · · · · · · · · ·

Step 1: See if Your Plastic Card Needs to be Replaced.

TIP 1: Enlarge the number on a Xerox machine and attach to your application

