TRANSIT BENEFIT PROGRAM Approving Official Guide

Last Update 2.24.2016

Presented By:

Visit the TRANServe website at: http://transerve.dot.gov

Start at the TRANServe.dot.gov

- Choose Participants :

HOME	DEBIT CARD	RETURN OF EXCESS TRANSIT BENEFIT	RESOURCES	PARTICIPANTS	CONTACT US	F.A.Q.

- Select **HUD-OIG**
- Click: HUD-OIG Transit Benefit Application System
- Log-in with your User Name and Password
    - ♦ Your government email address is your User Name
    - ♦ FIRST TIME ONLY – Click "Register" to create an account"
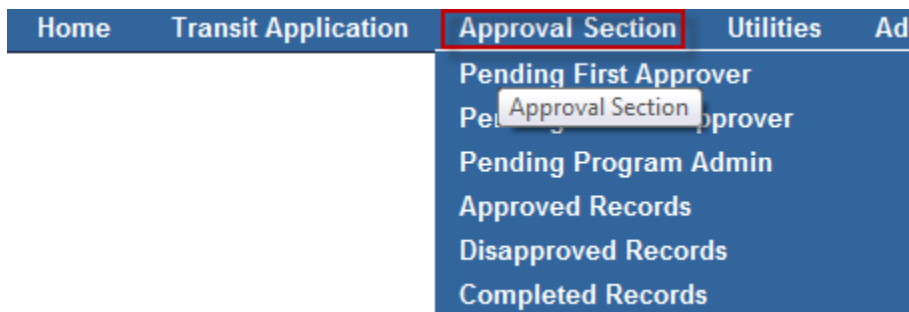   - ▪ A temporary password will be emailed to you

LOG IN

*User Name: [   ]
*Password: [   ]   Forgot Password?

[Log In]

NOT REGISTERED YET?   [Register]

Application Types:

1) RECERTIFY/ENROLL
    a. Recertification = existing participants
    b. New enrollees

2) CHANGE
    a. Information Change
        i. address, rate, method of transportation

3) WITHDRAWAL
    a. Withdraw from the program

Visit the TRANServe website at: http://transerve.dot.gov

1. Select "Approval Section"

2. Select the correct queue:
   a. **1ˢᵗ Approver** –
   b. **2ⁿᵈ Approver** –

3. Click the name to review

The application and expense worksheet are displayed:

* indicates required field.

*Reason for Certification: [Annual Certification/Recertification ▼]

*Select your transportation methods:

☑ Bus ☑ Rail ☑ Other Method ☑ Vanpool

Employment Type: [CIVILIAN ▼] ⓘ Work Status: [Full Time ▼]

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.

Method of Transportation		Daily Expense	Days per Month	Monthly Expense
Bus to Work	Name of Company / Name/Station or Route	$ 5.02	8	$ 40.16
Bus from Work	Name of Company / Name/Station or Route	$ 4.20	8	$ 33.60
Other Bus to Work	Name of Company / Metro/A46	$ 2.35	8	$ 18.80
Other Bus from Work	Name of Company / Name/Station or Route	$ 3.10	8	$ 24.80
Rail to Work	Name of Company / VRE/Burke	$ 5.35	8	$ 42.80
Rail from Work	Name of Company / Name/Station or Route	$ 5.35	8	$ 42.80
Other Method to Work: Subway	Name of Company / Name/Station or Route	$ 2.10	8	$ 16.80
Other Method from Work: Subway	Name of Company / Name/Station or Route	$ 3.15	8	$ 25.20
Van Pool	Name of Company / Danz Vanz	$ 28.13	8	$ 225.00

Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.

Total Monthly Expense: 469.96

TRANSIT BENEFIT PROGRAM APPLICATION

*H ID #: `******` ❓

Name: JOHNSON (Last)   CHERI (First)   A. (Middle Name)

Email Address: cheri.johnson@dot.gov   *Work Phone: 123-456-7890 ❓

*Common Identifier: H123456 ❓

DEPARTMENT OF TRANSPORTATION

*Select Your Agency/Mode: ▾   *Office Locality: DAYTON ▾ ❓

*Program Office: TEST CARDS ▾ ❓

Accounting Code: [   ]   Select... ❓
Routing Symbol: [   ]   Select... ❓
Location/Building: [   ]   Select... ❓

I certify that my usual **monthly Transit commuting costs** are: 469.96 ❓

WORK INFORMATION

*Work Address: 1234 Office Location Blvd
*Work City: City Name   *Work State: DE ▾   *Work Zip: [   ]

RESIDENCE INFORMATION

*Address: 1234 SYSTEM TEST AVENUE
Address 2: 2931 TALLOW LANE
*City: BOWIE   *State: MD ▾   *Zip: 20715

*Supervisor: [   ]   Select... ❓   *Point of Contact: CANDACE SWANN   Select... ❓

*Office of Administration: [   ]   Select... ❓   Manager Phone: [   ]

*SmartTrip Card Number: [   ] ❓

Comment for Agency Approvers: ❓   Enter additional information that may assist in the Approval of your Application.

Continue...   Cancel

4. Review the Application

   a. The Application must:
      i. Specify name of Transportation Provider
      ii. Indicate Daily, Weekly, Subtotal, Total Monthly Expense

   b. The Approver must:
      i. Verify the employee works for your Agency
         1. Check with your HR department, if needed
         2. Check the global directory
      ii. Check SmarTrip® user entered number correctly
         1. Regional Field Offices enter "NA"
      iii. Approve or Disapprove the Application
         1. Scroll to the top
            a. Click "Approve" or "Disapprove"

      iv. If disapproved, enter Instructions to Participant in "Reason for Disapproval"

Note: Click "[History]" to review past actions

5. View Past Applications
   a. Select "Completed Records"
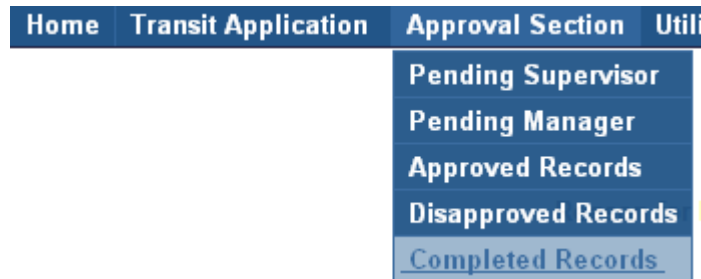
   b. Enter Participant's Name
   c. Click "Search"
      i. Click Participant Name to choose record
         1. Review past application (if applicable)
         2. Click "Back" to look at another past application
         3. Use this Navigation Bar to take another action

Appendix A

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Using the Proxy Feature

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Add a Proxy

1. From the Home screen, click "My Account"
2. Click on your role
   a. "Supervisor Proxy" or "Manager Proxy"

3. Select your designated Proxy from (not selected) list on the left
4. Click "Add" to move name to (selected) box.
5. Click "Update"

Reverse to Remove:

1. Click "Remove" to return name to the (not selected) box.
2. Click "Update"

Your National Transit Benefit Office is here to assist Approvers

Please e-mail questions to:

TransitSubsidy@hudoig.gov

Or

Visit http://transerve.dot.gov/

TRANServe.dot.gov is an excellent resource providing access to TRANServe's Electronic Transit Benefit Application System, Program Materials, Best Practices, Policy, Regulations, Training, Guidance and Transit Links to assist in monitoring and administering your transit beneefit program.

U.S. Department of Transportation

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