# TRANSIT BENEFIT PROGRAM
# Approving Official Guide

**Last Update 2.2.2016**

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. |
|------|-----------|----------------------------------|-----------|--------------|-----------|--------|

- Click: DOC NTIA 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"
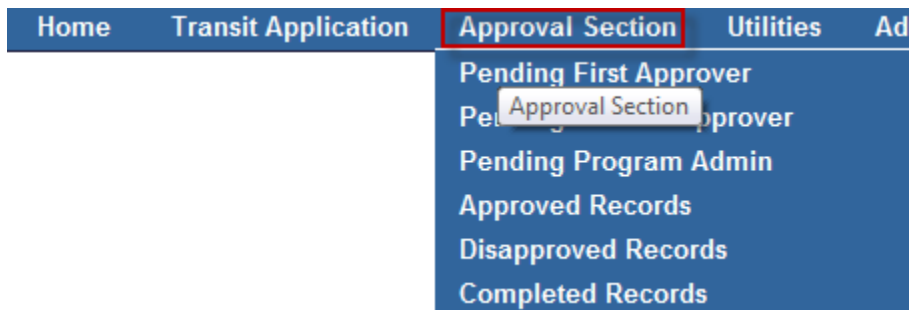    - ▪ A temporary password will be emailed to you



**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

1. Select "Approval Section"



2. Select the correct queue:
   a. **1<sup>st</sup> Approver** –
   b. **2<sup>nd</sup> Approver** –

3. Click the name to review



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

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 ▼ ] ⑦   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

*HID#: ****** ❓

Name: JOHNSON    CHERI    A.
      (Last)      (First)   (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
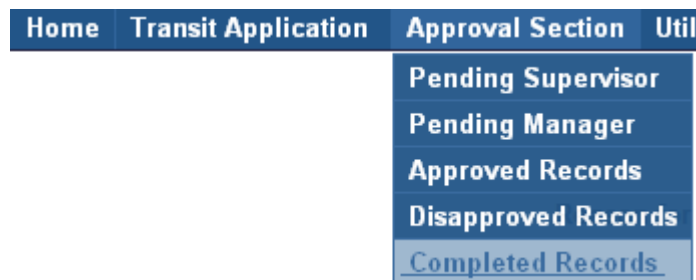              a. Click "Approve" or "Disapprove"



      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**

## <u>Using the Proxy Feature</u>

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"
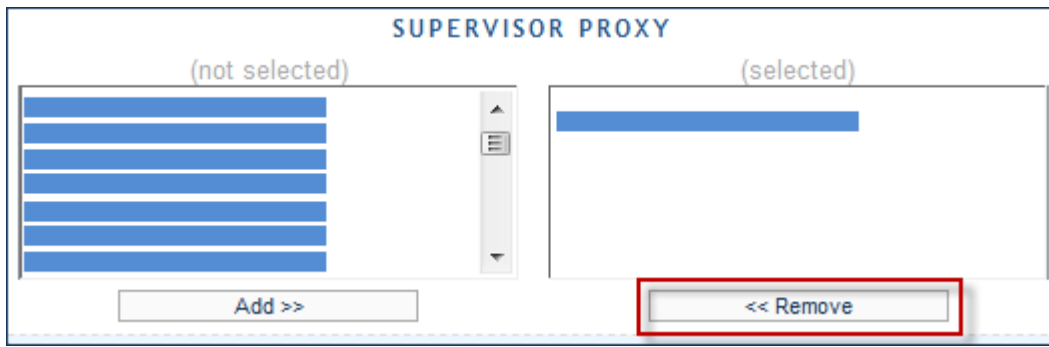
**Your National Transit Benefit Office is here to assist Approvers**

**Please e-mail questions to:**

**LBRODSKY@NTIA.DOC.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.**