



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** :



- Select **HUD**
- Click: [HUD 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

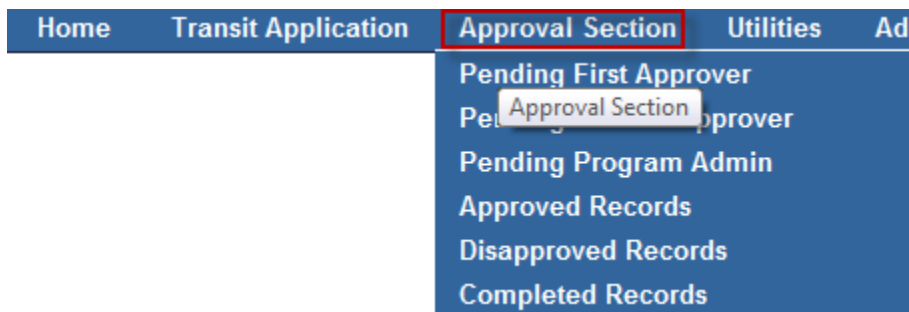
A screenshot of a web form titled 'LOG IN'. It contains two input fields: '*User Name:' and '*Password:'. To the right of the password field is a link that says 'Forgot Password?'. Below the input fields is a 'Log In' button. At the bottom of the form, there is a link that says 'NOT REGISTERED YET?' followed by a 'Register' button. The 'Register' button is highlighted with a red border.

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

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1. Select “Approval Section”



2. Select the correct queue:

- a. [1st Approver](#) –
- b. [2nd Approver](#) –

3. Click the name to review

Mode	Admin	Request Date	Type	Name	Approved	Disapproved Reason:
DOT-FMCSA	FMCSA	02/25/2013	RECERTIFY	Click Name Here	<input type="checkbox"/>	<input type="text"/>
DOT-FRA	FRA	02/27/2013	RECERTIFY	Click Name Here	<input type="checkbox"/>	<input type="text"/>
DOT-MARAD	MARAD	11/30/2012	WITHDRAW	Click Name Here	<input type="checkbox"/>	<input type="text"/>
DOT-MARAD	MARAD	12/05/2012	WITHDRAW	Click Name Here	<input type="checkbox"/>	<input type="text"/>
DOT-MARAD	MARAD	02/01/2013	WITHDRAW	Click Name Here	<input type="checkbox"/>	<input type="text"/>
DOT-NHTSA	NHTSA	01/16/2013	WITHDRAW	Click Name Here	<input type="checkbox"/>	<input type="text"/>

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The application and expense worksheet are displayed:

* indicates required field.

*Reason for Certification:

*Select your transportation methods:

Bus Rail Other Method Vanpool

Employment Type: Work Status:

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 <input type="text" value="Name/Station or Route"/>	\$ 5.02	8	\$ 40.16
Bus from Work	Name of Company <input type="text" value="Name/Station or Route"/>	\$ 4.20	8	\$ 33.60
Other Bus to Work	Name of Company <input type="text" value="Metro/A46"/>	\$ 2.35	8	\$ 18.80
Other Bus from Work	Name of Company <input type="text" value="Name/Station or Route"/>	\$ 3.10	8	\$ 24.80
Rail to Work	Name of Company <input type="text" value="VRE/Burke"/>	\$ 5.35	8	\$ 42.80
Rail from Work	Name of Company <input type="text" value="Name/Station or Route"/>	\$ 5.35	8	\$ 42.80
Other Method to Work: <input type="text" value="Subway"/>	Name of Company <input type="text" value="Name/Station or Route"/>	\$ 2.10	8	\$ 16.80
Other Method from Work: <input type="text" value="Subway"/>	Name of Company <input type="text" value="Name/Station or Route"/>	\$ 3.15	8	\$ 25.20
Van Pool	Name of Company <input type="text" value="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: <input type="text" value="469.96"/>		

TRANSIT BENEFIT PROGRAM APPLICATION

*HID #: *****

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: [dropdown] *Office Locality: DAYTON

*Program Office: TEST CARDS

Accounting Code: [dropdown] Select..

Routing Symbol: [dropdown] Select..

Location/Building: [dropdown] 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: [dropdown]

RESIDENCE INFORMATION

*Address: 1234 SYSTEM TEST AVENUE

Address 2: 2931 TALLOW LANE

*City: BOWIE *State: MD *Zip: 20715

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

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

*SmartTrip Card Number: [dropdown]

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”

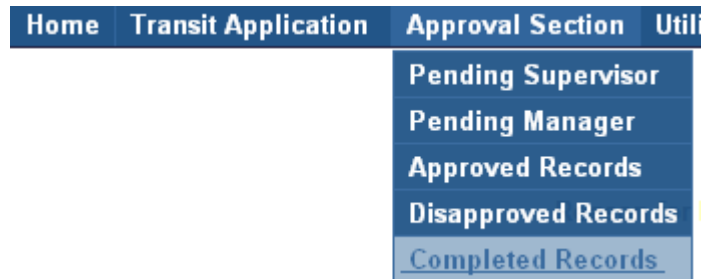
The screenshot shows a rectangular interface with three buttons at the top: 'Approve', 'Disapprove', and 'Cancel'. Below these buttons is a text input field labeled 'Reason for Disapproval:'. In the bottom right corner of the interface is a blue link labeled '[History]'.

- 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

Using the Proxy Feature

Add a Proxy

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

The screenshot shows the 'SUPERVISOR PROXY' interface. It features two columns: '(not selected)' on the left and '(selected)' on the right. The '(not selected)' column contains a list of five blue horizontal bars. Below this list is a button labeled 'Add >>' which is highlighted with a red rectangle. The '(selected)' column is currently empty. Below the columns is a button labeled '<< Remove'. At the bottom of the interface, there is a light blue box containing the text 'Users who have you as proxy: N/A'. Below this box is a hint: 'A hint is a meaningful personal association to help you remember your password. This is optional, but highly recommended.' At the very bottom are three buttons: 'Update', 'Cancel', and 'Reset'.

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”

The screenshot shows the 'SUPERVISOR PROXY' interface. It features two columns: '(not selected)' on the left and '(selected)' on the right. The '(not selected)' column contains a list of five blue horizontal bars. The '(selected)' column contains one blue horizontal bar. Below the '(not selected)' column is a button labeled 'Add >>'. Below the '(selected)' column is a button labeled '<< Remove' which is highlighted with a red rectangle. At the bottom of the interface, there are three buttons: 'Update', 'Cancel', and 'Reset'.

Your National Transit Benefit Office is here to assist Approvers

Please e-mail questions to:

For Baltimore & Richmond

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Philadelphia & Charleston

Carol Juzwiak at Carol.Juzwiak@hud.gov

Pittsburgh

Pamela Whitelock at Pamela.Whitelock@hud.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 benefit
program.**

U.S. Department of Transportation

