

DOI-OS FEDERAL EMPLOYEE TRANSPORTATION SUBSIDY BENEFIT PROGRAM Applicant Guide

Apply for the Transportation Subsidy Benefit Program in four easy steps:

- I. Complete the Transit Benefit Integrity Awareness Training
- II. Purchase and Register a SmarTrip® card (DC area commuters) if the transit vendor uses SmarTrip® cards. If your vendor uses the TRANServe card it will be provided after your transit benefit application is approved
- III. Use your DOI-OS federally recognized email address to create a Username on the TRANServe website
- IV. Submit the Transportation Subsidy Benefit Program expense worksheet and application

I. Complete Transit Benefit Integrity Awareness Training

For DOI-OS Employees with Access to the DOI Learn Automated System

1. Go to the DOI-OS Transportation Subsidy Benefit Program webpage:

http://www.doi.gov/ofas/support services/transportation subsidy.cfm.

- 1.1. Select the Transit Benefit Integrity Awareness Training hyperlink.
- 1.2. Complete the online training course in DOI Learn.
- 1.3. Upon receipt of your DOI Learn course completion email from the Learning System Administrator, forward the email with attached *Transit Integrity Benefit Awareness Certificate of Completion* to your DOI-OS Headquarters Transportation Subsidy Coordinator (HQ TSC) and/or DOI-OS Regional-Site Transportation Subsidy Coordinator (R TSC), as appropriate.
- 1.4. Retain for your records a copy of your certificate of completion.
- 1.5. **Please note**: All Transit Benefit Integrity Awareness Training MUST occur in DOI Learn in order to be part of your official training transcript. ONLY New DOI-OS Employees, without DOI Learn access, may use the Transit Benefit Integrity Awareness Downloadable CD as a temporary workaround. Once DOI Learn access is granted, within 30 days supervisors must update your DOI Learn transcript to reflect training completion or you must complete the online training.

For DOI-OS Employees without Access to the DOI Learn Automated System

2. Go to the DOI-OS Transportation Subsidy Benefit Program webpage:

http://www.doi.gov/ofas/support services/transportation subsidy.cfm.

- 2.1. Select the Transit Benefit Integrity Awareness Training Downloadable CD hyperlink.
- 2.2. Follow the Instructions for Downloading and Extracting Zipped Files from http://www.doi.gov/doilearn/training-download.cfm.
- 2.3. Complete the training course.
- 2.4. Retain for your records a copy of your certificate of completion and provide the certificate to your supervisor. Your supervisor can update your DOI Learn transcript to reflect training completion.
- 2.5. Scan and email the *Transit Benefit Integrity Awareness Certificate of Completion* to your DOI-OS Headquarters Transportation Subsidy Coordinator (HQ TSC) and/or DOI-OS Regional-Site Transportation Subsidy Coordinator (R TSC), as appropriate.
- 2.6. **Please note**: All *Transit Benefit* Integrity *Awareness* Training MUST occur in DOI Learn in order to be part of your official training transcript. ONLY New DOI-OS Employees, without DOI Learn access, may use the Transit Benefit Integrity Awareness Downloadable CD as a temporary workaround. Once DOI Learn access is granted, within 30 days supervisors must

update your DOI Learn transcript to reflect training completion and/or you must complete the online training.

II. Purchase and Register a SmarTrip® card (skip this step if you do not work in the Washington, DC area).

SmarTrip® card use is mandatory for all participants in the National Capital Region who ride Metro Rail, Metro Bus, The Bus, ART - Arlington Transit, DASH, DC Circulator, CUE Fairfax, Quicks Bus, Loudon Commuter Bus, PRTC Omni, Montgomery County Ride On, and/or REX.

- 1. **Purchase a SmarTrip® Card** This is a reloadable electronic fare card. Using a reloadable fare card supports government initiatives to support and improve the environment.
 - 1.1. You can make a purchase at a Metro Sales Store, Kiosk (located in Metro Stations with parking), a Commuter Store and many retail establishments.
 - 1.1.1. For more information on purchase locations:

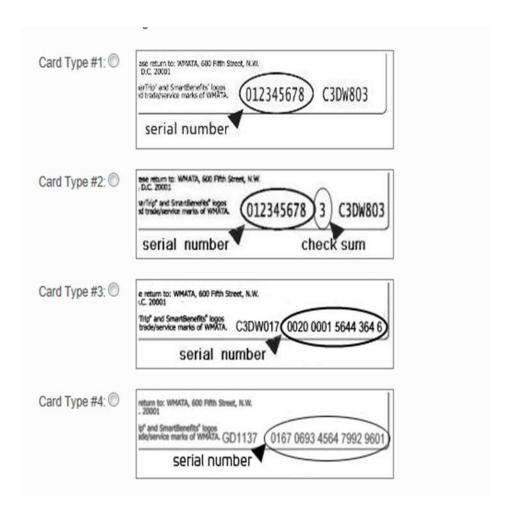
http://www.wmata.com/fares/purchase/where.cfm

1.1.2. You can also purchase a SmarTrip® Card on line:

https://smartrip.wmata.com/storefront

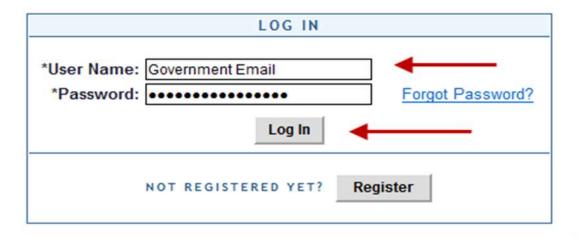
1.1.2.1. An online order requires you to provide a shipping address that matches the billing address on record with your credit card provider.

- 1.1.3. For all program instances where your name is used, use the name on your DOI ID to ensure the benefit is accurately applied to your SmartBenefits account.
- 2. Create a Personal Account and 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. A benefit of registering your card is, in the event the card is lost or stolen, your funds are protected. This protection permits you to replace your SmarTrip® card, and ask WMATA to transfer the funds to your new card.
- 3. Register your SmarTrip® card https://smartrip.wmata.com/Registration/Register.aspx.
 - 3.1.1. You must indicate the type of card by matching the serial number on the back with the pattern that is circled in the illustration on the next page.
 - 3.1.2. If your SmarTrip® (or CharmCard) serial number has fewer than nine (9) digits, you need to add zeros to the front to make it nine (9) digits.
 - 3.1.3. If you have questions, contact WMATA directly. Call: 202-637-7000 or Email: smartrip@wmata.com Or to submit a Web Inquiry: http://www.wmata.com/about_metro/contact_us/ridercomment.cfm



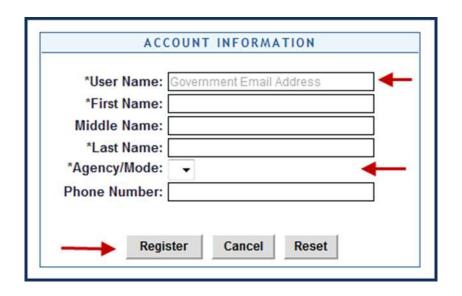
3.1.4. If you ride more than one transit system in your regular home to work to home commute, allot some of your benefit to your SmarTrip® card and the rest to another transit system using Commuter Direct.

- 3.1.5. If you require more than 1 method of distribution, the Department of Transportation may limit the use of each method for operational efficiency. For example: A participant in the D.C. area commutes using both MARC and the WMATA Metro. The maximum transit benefit is \$130.00 and the participant's MARC ticket is \$200.00. DOT will elect to provide the maximum \$130.00 on the TRANServe Debit Card so that you can purchase a MARC ticket (after adding your personnel funds). DOT will not accept requests to split the amount between MARC and WMATA in this example. Split requests will be accepted if the MARC ticket is \$100.00. The remaining \$30 benefit will be provided through the WMATA SmartBenefits® program.
- 3.1.6. DOI will provide you with a TRANServe Debit Card for the following transportation providers in the Washington D.C. area who do not accept the SmarTrip® Card: VRE, MARC, MTA Buses such as: Dillon, Eyre, Keller, Quicks Bus, or Amtrak, Vanpools (including Moore Services RU, Commuter Express, TP Vans and others), MARTZ National Coach, WMATA's EZ-Pay Metro Access and VSPI.
- 3.1.7. The TRANServe Debit Card will be mailed to your DOI-OS Headquarters and/or Regional-site Transportation Subsidy Benefit Coordinator and provided to you AFTER your enrollment is approved and processed. Additional instructions are provided at that time.
- III. Use your official DOI-OS federally recognized email address to create a Username



- 1. Log on to: TRANServe Transit Benefit Application Website: https://transitapp.ost.dot.gov
- 2. **Register:** If this is your first time in this system.

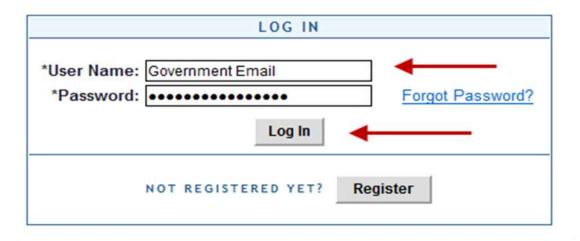
YOU WILL ONLY NEED TO REGISTER THE FIRST TIME YOU USE THE SYSTEM



- 2.1. Complete the Registration Form
 - 2.1.1. Use your **official DOI-OS federally recognized email address** as your User Name
 - 2.1.2. Select "DOI-OS" from the Agency/Mode drop-down box to auto-fill
 - 2.1.3. Click "Register"
 - 2.1.4. **Please note:** A temporary password will be emailed to you **within a few minutes**. When you receive your temporary password, please follow the Change Your Password Instructions below.

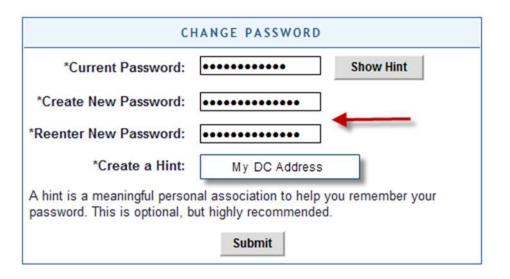
3. Change Your Password Instructions

- 3.1. Log Into Change Your Password
- 3.2. Return to the Login Screen https://transitapp.ost.dot.gov
- 3.3. Enter your User Name and Temporary Password



3.4. **Click "Log In"**

- 3.5. Complete the Change Password Form
 - 3.5.1. Select "Change Password"



- 3.5.2. Enter Current Password
- 3.5.3. Create New Password
- 3.5.4. Reenter New Password
- 3.5.5. Create a meaningful "Hint"
- 3.5.6. Click "Submit"

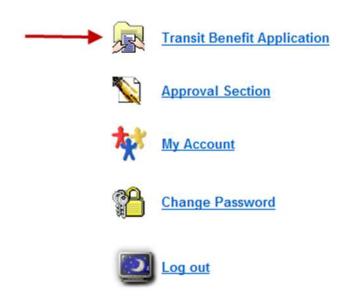
"Password Changed" will be displayed!

DOI-OS Applicant Guide Click "Home" on the blue task bar to continue



4. To Update Account Information

- 4.1. Log in using your Username and Password
 - 4.1.1. Select "Transit Benefit Application" to apply/recertify, change existing information and/or withdraw from the program



4.1.2. Select: "My Account" to change Supervisor or OS Headquarters Transportation Subsidy Coordinator or Regional-Site Transportation Subsidy Coordinator.



- IV. Submit the Transportation Subsidy Benefit Program expense worksheet and application
- 1. To Apply or Update the Transportation Subsidy Benefit Application
 - 1.1. Select: "Certify/Enroll"



1.2. Click "Continue" to read the terms and conditions of the Transportation Subsidy Benefit Program

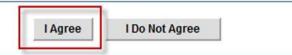
1.3. Click "I Agree" to proceed to the application

YOU MUST AGREE TO THE TERMS AND CONDITIONS OF THE TRANSPORTATION SUBSIDY BENEFIT PROGRAM TO PROCEED

WARNING !

This certification concerns a matter within the jurisdiction of an agency of the United States. Making a false, fictitious, or fraudulent certification may constitute criminal violations punishable under Title 18, United States Code, Section 1001, by imprisonment up to five years and fines up to \$10,000 for each offense, and/or agency disciplinary actions up to and including dismissal.

- 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.
- 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.
- 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.
- 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.
- I certify that my parking fees are not included in the computation of the daily, weekly or monthly commuting costs for my transit benefit.



2. To Obtain Your Accounting Code

- 2.1. Contact your Administrative Officer or Budget Analyst.
- 2.2. See Sample Accounting Codes below

Sample Accounting Code

1st - Fund/Functional Area

Example: 15XD4523WS/DWSP00000.000000

2nd - Fund Center (Cost Center)

Example: DS68410000

3rd - WBS Structure

Example: DP.68402 or DP.68425.15OMSVCS

3. To Verify Your Supervisor is Listed As an Approver

- 3.1. Scroll to the very bottom of the Application
- 3.2. Locate "First Approver".

RESIDENCE INFORMATION	2			
*Address: 1234 SYSTEM TEST A	VENUE			
Address 2: 2931 TALLOW LANE				
*City: BOWIE		*State: MD V	*Zip: 20715	
*First Approver:	Select.	*Point of Contact: C	ANDACE SWANN	Select.
*TBC Certifier:	Select @	Manager F	Phone:	
*SmartTrip Card Number:	0		5 5.	
Comment for Agency Approvers:				0
	Continu	ue Cancel		
PRIVACY ACT STATEMENT: This notice is provided pursuant authority of 5 U.S.C. ŧ 7905. Fu of the information may result in d of the information are to facilitate and to prevent misuse of the fundand for periodic review or revalid applications within the system to Register at 65 F.R.19476 (April 1	to the Privacy Act of 1 irrnishing the informati isapproval of your req timely processing of its involved. The infor- ation of transit benefit detect duplicate appli	ion on this form is volur quest for a public transity your request, to ensure mation may be used for ts. Partial SSN (last 4 d	ntary, but failure to t fare benefit. The party your eligibility for to r production of listin ligits) is used to con	provide all or par principal purposes transit benefits, ngs and reports mpare

HIS IS AN IMPORTANT CHECK POINT!

- 3.3. Click "Select" to Locate your Supervisor's Name
 - 3.3.1. Use Ctrl. + F to locate it more quickly
- 3.4. Notify your supervisor if their name is not in the "Select" List
 - 3.4.1. They must register before you can proceed

- 3.5. After your Supervisor registers, the Program Office will elevate to Supervisor status to approve your Transportation Subsidy Benefit Application.
- 3.6. Once your Supervisor is approved they will now appear in the "Select" List; repeat steps above.
- 4. Read the Plain Language Reminder and Calculation Instructions at the top of the Transit Benefit Application Worksheet.

TRANSIT BENEFIT APPLICATION WORKSHEET

All Transit Benefit Program Applicants are required to certify the "Total Monthly Expense" of their Home to Work Mass Transit Commute.

Parking fees are not eligible for the transit benefit and must not be included in "Total Monthly Expense".

Instructions: To calculate your "Total Monthly Expense"

- Select your transportation method(s)
- b. Enter the following information in the "To Work" and "From Work" row(s) of each transportation method:
 - i. Name of Company for your method of transportation (Metro, BART, Subway)
 - ii. Daily or Monthly Expense
 - iii. Number of days you routinely work in a month
- c. If you purchase a Monthly pass, divide the price of the pass by 2, and enter the information in the Monthly Expense column.
- d. The Total Monthly Expense value automatically populates

- 4.1. Follow these Steps to Complete/Submit the Transportation Subsidy Worksheet (See Screenshot on Page 22)
 - 4.1.1. Specify the Reason for Certification using the drop down box
 - 4.1.2. Use the check box to certify you already completed the training requirement
 - 4.1.3. Select your usual methods of mass transportation
 - 4.1.4. Select "Employment Type" from drop-down menu
 - 4.1.4.1. Interns choose "Paid" or "Unpaid Intern"
 - 4.1.4.2. All others choose "Civilian"
 - 4.1.5. Select your work status from drop-down menu
 - 4.1.5.1. Defaults to "Full Time"
 - 4.1.6. Enter ONE Transit Company Name per line
 - 4.1.6.1. Do NOT enter Metro/VRE or any other combination
 - 4.1.6.2. Use "other" if you have a second entry
 - 4.1.7. Enter your daily and monthly commuting expenses
 - 4.1.8. Enter the number of days you routinely *commute* in a month
 - 4.1.8.1. Do you work a compressed schedule?
 - 4.1.8.1.1. RDO (Regular Day Off)
 - 4.1.8.1.2. AWS (Alternative work Schedule)
 - 4.1.8.1.3. Telework
 - 4.1.9. Every Transportation Subsidy Benefit Program Participant is responsible to make adjustments to the amount of their transit benefit to reflect the actual cost of their home to work commute.

- 4.1.10. Confirm that the information in their application is correct.
- 4.1.11. Certify that they are still using mass transit to commute to and from work. The TRANServe Program System may automatically withdraw participants who do not recertify. This may result in a delay or disruption in transit benefits even if a participant quickly reactivates his or her account.
- 4.1.11.1. If a participant is withdrawn from the Program, the Department of Transportation does not immediately sweep all remaining benefits off the participant's card. Any benefits loaded at the time of the withdrawal will remain on the card until the 9th of the following month.
- 4.1.11.2. If a participant does not have an approved application on the 25th of the month, his or her TRANServe Debit Card will not be loaded on the 10th of the following month. For example, if a participant does not recertify by 15 May, he or she will be withdrawn shortly thereafter. If the participant remains withdrawn (or the reactivated application remains not approved) on 25 May, then the participant's TRANServe Debit Card will not be loaded on 10 June.
- 4.1.11.3. The participant will then not have transit benefits for July commuting. Since this participant was withdrawn around 15 May (after his or her June transit benefit was loaded), the participant will continue to have access to their June benefit through midnight on 9 June. Participants who are unable to recertify between the 1st and the 15th due to extenuating circumstances should suspend their transit benefit application.

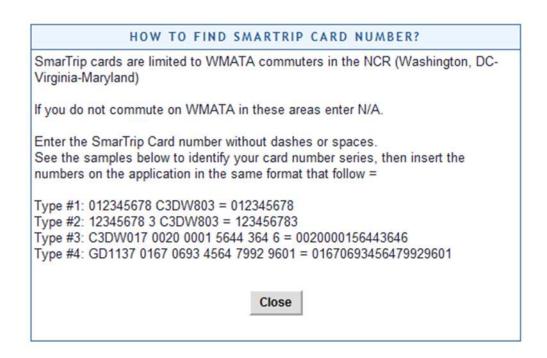
Please note: Repeat these steps for each method of Mass Transit you use. The Total Monthly Expense value automatically calculates and transfers to the Application.

*Reason for Certification: Annual Certification/Recertification ▼ *Select your transportation methods: □ Bus □ Rail □ Other Method □ Vanpool *Civilian/Military: Civilian ▼ Work Status: Full Time ▼						
If you work 8-hour days, enter 20 in the Days per Month column If you work 9-hour days, enter 18 in the Days per Month column If you work 10-hour days, enter 16 in 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	\$		\$		
Bus from Work	Name of Company	\$		\$		
Other Bus to Work	Name of Company	\$		\$		
Other Bus from Work	Name of Company	\$		\$		
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: 0.00				

4.2. Follow these Steps to Complete/Submit the Transportation Subsidy Program Application (For Additional Information you may click throughout the Expense Worksheet and Application)

- 4.2.1. Identifier: Enter your last four digits of your Social Security
- 4.2.2. Work Phone: Enter your work phone
- 4.2.3. Common Identifier: Enter the first initial of your first name and entire last name
- 4.2.4. Agency/Mode: Enter DOI-OS
- 4.2.5. Region: Enter the region closest to where you work most days
- 4.2.6. Admin: Enter the OS Headquarters Transportation Subsidy Coordinator
- 4.2.7. Enter work information
- 4.2.8. Enter the full address to which you commute via mass transit
- 4.2.9. Enter residence information
- 4.2.10. The full address from which you commute via mass transit
- 4.2.11. Select Approving Official Supervisor
- 4.2.12. Select Approving Official DOI-OS Headquarters Transportation Subsidy Coordinator (HQ TSC) and/or DOI-OS Regional-Site Transportation Subsidy Coordinator (R TSC)
- 4.2.13. Select Approving Official Funds Approver
- 4.2.14. Manager Phone: Enter the best number with which to reach your Supervisor
- 4.2.15. Enter SmarTrip® card number.

Refer to the icon to identify the correct nine digit sequence required by Metro. (See below example)



4.2.16. All DOI-OS employees within the National Capital Region who use SmarTrip® card enabled mode of mass transit must use a SmarTrip® card.

- 4.2.17. Comment for Participants: Provide a copy of your Commuter Trip Planner from your Transit Authority to your HQ Transportation Subsidy Coordinator or Regional-Site Transportation Subsidy Coordinator, as appropriate.
- 4.2.18. Click "Submit Application"

You will receive email notification that your application was forwarded to the first Approver (your Supervisor).

TRANServe Electronic Transit Benefit System Access Frequently Asked Questions

Q. How do I enter the Electronic Application System the first time?

You must use your DOI-OS federally recognized email address as your Username.

- 1. Go to: http://transerve.dot.gov/
- 2. Open the "Participants" Page



3. Click United States Department of the Interior

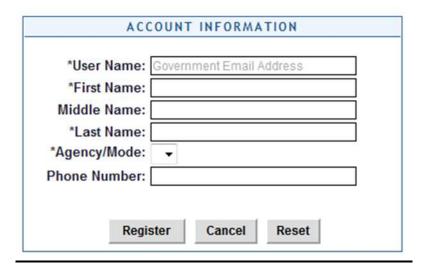
4. Now Click "United States Department of the Interior"- Transit Benefit Program Enrollment/Change Application"

5. Log In Page: Enter your DOI-OS federally recognized email address (i.e. <u>First.Last@ios.doi.gov</u>)

5.1. Click "Register"



6. Account Information Page



- 6.1. Enter your Name, as it appears on your Gov't ID
- 6.2. Select "DOI-OS from the Agency/Mode drop down box
- 6.3. Enter your Government office phone number or government issued cell number.

Remember to REGISTER ONLY ONCE! The first time you use the system.

A temporary password will come via your DOI-OS email.

- 6.4. Repeat steps 1-5
- 6.5. Enter your Password
- 6.6. Click "Log In"

7. <u>Did you forget your password?</u>

- 7.1. Go to: http://transerve.dot.gov/
- 7.2. Open the "Participants" Page



- 7.3. Click "DOI-OS" then
- 7.4. Click "DOI-OS Transit Benefit Program Enrollment/Change Application "
- 7.5. Enter your DOI-OS email address

7.6. Click "Forgot Password



- 7.7. Enter your DOI-OS email address
- 7.8. Choose "Try Again" or "Send it by Email"



7.9. Click "Return" to get back to the Login Page

- 7.10. Need to request information, such as application status?
 - 7.10.1. You can request information directly from TRANServe by submitting questions regarding the transit program or a submitted application through your bureau or office Point of Contact (POC)/Coordinator.

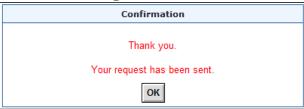


7.10.2. The Request Information radio button is selected by default when the page is displayed. Click the Continue button to display the Request Information page.

REQUEST INFORMATION				
* indicates required field.				
Name: Michellé D Howard-Hanson (First) (Middle Name) (Last)				
Email Address: michelle_howard-hans@ios.doi.gov				
Agency: DOI-OS (DOI-OS)				
*Point of Contact: DANTE JEFFRIES Select				
*Question:				
Send Request Cancel				

Request Information page

- 7.10.3. If a POC has been selected it will pre-populate in the Point of Contact textbox. To select a POC, click the Select link to display the available POCs in a separate window.
- 7.10.4. Select a POC from the list.
- 7.10.5. Enter the question or concern in the Question textbox and click the Send Request button.
- 7.10.6. An email is sent to the TRANServe POC and a confirmation message is displayed. Click the OK button to close the message.



Request Information Confirmation

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REMEMBER

Your Transportation Subsidy Benefit Program Coordinator is available to assist you.

For Program information visit the OFAS Transit Subsidy Benefit Program web page.