



**TRANSIT BENEFIT PROGRAM**  
**APPLICATION SYSTEM**  
**DOI-NIGC APPROVER USER GUIDE**



Submitted by

TRANServe

A division of the

Office of Financial Management and Transit Benefit Programs

Office of the Secretary of Transportation

U.S. Department of Transportation

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# 1. OVERVIEW

## 1.1 Background

The Department of Transportation, Transportation Services Division (TRANServe), administers the Transit Benefit Program for DOT and as Service Provider to other federal agencies, nation-wide. The Office currently supports federal agencies and sub-agencies, providing timely and efficient transit benefit program services to customers who will use TRANServe's Transit Benefit Application System. Services include purchasing and distributing mass transit fare media.

TRANServe's Electronic Application System serves as the publicly accessible interface for managing Transit Benefit Program Applications. The current application system is available on-line through the internet and is optimized for desktop and mobile devices. Federal government employees can apply for the transit benefit, request information, withdraw from the program and recertify. Agency Program Offices and Approvers are able to view, update, approve, or disapprove applications using the System.

## 1.2 Purpose

The Transit Benefit Application System user guide is designed to provide written instruction on how to use the application effectively and efficiently. Screenshots serve as examples. Field labels may not be Agency specific.

## 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 Points of Contact

The table below provides a list of contact for additional information regarding the Transit Benefit Application process.

Role	Name/Phone	Title	Email
Main Coordinator	Renee Fox 202-632-7003	Main Coordinator	Renee_Fox@nigc.gov

**PLEASE HAVE YOUR FUND/FUNCTIONAL AREA, COST CENTER CODE AND WBS CODES AVAILABLE FOR YOUR PARTICIPANTS**

**ALL TRANSIT SUBSIDY PROGRAM SUPERVISORS MUST COMPLETE THE DOI REQUIRED TRANSIT BENEFIT INTEGRITY AWARENESS TRAINING EACH FISCAL YEAR.**

ALL FIRST TIME USERS MUST BE REGISTERED IN THE SYSTEM, INSTRUCTIONS BELOW.

## 2. ACCESSING THE TRANSIT BENEFIT APPLICATION

### 2.1 Login Screen

Use the following steps to access the application:

Enter the URL: <https://transitapp.ost.dot.gov> . The Transit Benefit Application System home page is displayed.

U.S. Department of Transportation  
TRANSERVE  
Business in motion  
Login

\* Indicates required field.

Login

\*User Name: Government Email Address

\*Password: Enter password

Log In

Forgot Password?

Not registered yet? Register

\*\*\*WARNING\*\*\*WARNING\*\*\*WARNING\*\*\*

You are accessing a U.S. Government information system, which includes this computer, the computer network on which it is connected, all other computers connected to this network, and all storage media connected to this computer or other computers on this network. This information system is provided for U.S. Government use only. Unauthorized or improper use of this information may result in disciplinary action, as well as civil and criminal penalties. By using this information system you consent to the following:

1. You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system.

\*\*\*WARNING\*\*\*WARNING\*\*\*WARNING\*\*\*

Friday, January 15, 2016

**Figure 1: Transit Benefit Application Log In page**

First time users must register. Use the following steps:

Click the **Register** button. The Register Account Information page is displayed.

Register Account Information

\*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**

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

Enter your official government email address in the User Name textbox.

Complete the registration form.

Register Account Information

\*User Name: kimberly.j.gravestest@va.gov

\*First Name: Kimberly

Middle Name: J

\*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**

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

Click the **Register** button.

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 user has registered, an email is sent containing a temporary password. Use the temporary password to log into the application using the following steps:

Enter your official government email address in the User Name textbox.

Enter the temporary password in the Password textbox. **DO NOT** include extra spaces!

Login

\*User Name: kimberly.j.gravestest@va.gov

\*Password: \*\*\*\*\*

Log In Forgot Password?

Not registered yet? Register

\*\*\*WARNING\*\*\*WARNING\*\*\*WARNING\*\*\*

You are accessing a U.S. Government information system, which includes this computer, the computer network on which it is connected, all other computers connected to this network, and all storage media connected to this computer or other computers on this network. This information system is provided for U.S. Government use only. Unauthorized or improper use of this information may result in disciplinary action, as well as civil and criminal penalties. By using this information system you consent to the following:

1. You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system.

\*\*\*WARNING\*\*\*WARNING\*\*\*WARNING\*\*\*

**Figure 5: Log In page**

Click the **Log In** button.

The Change Password page displays.

Change Password- Read instructions before beginning to create password.

After logging into the application for the first time, you are required to change the password to something that you will easily remember.

Enter the temporary password in the Current Password textbox.

Change Password **Password Expired**

\*Current Password:

\*Create New Password:

\*Confirm New Password:

\*Create a 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 repeated more than 1 time(s) in sequence  
Password must contain characters from at least 4 of the following categories.

- Uppercase characters (A through Z)
- Lowercase characters (a through z)
- Base 10 digits (0 through 9)
- Non-alphabetic characters (for example, !, \$, %)

Password will expire 60 days after being set  
Passwords cannot be reused 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**

Enter your new password in the Create New Password textbox.

Minimum 12 characters

Complexity: minimum of 1 uppercase, 1 lowercase, 1 number, 1 special character

Do use two characters consecutively. Ex: password, **22**, **##**

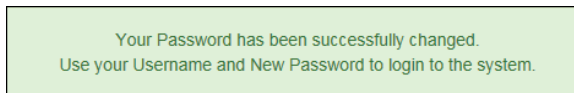
Reenter your new password in the Reenter New Password textbox.

Enter a hint to remind you of your password in the Create a Hint textbox.

Click the **Submit** button.

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

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



**Supervisors only:** After registration is complete, please send an email to Bureau Administrator Renee Fox at [Renee\\_Fox@nigc.gov](mailto:Renee_Fox@nigc.gov) to have you elevated to a supervisory role.

Participants, if you are getting errors when attempting to select a supervisor during your application process but you know your supervisor has completed registration, please check with Renee Fox at [Renee\\_Fox@nigc.gov](mailto:Renee_Fox@nigc.gov) ensure the supervisory role has been added.

**Maintenance:** Use the "Forgot Password" link at the log-in screen to reset your password. Please do not contact DOT or your Local/Regional Coordinator for this function – it can be performed only by the user. The system will generate an email with a new temporary password.



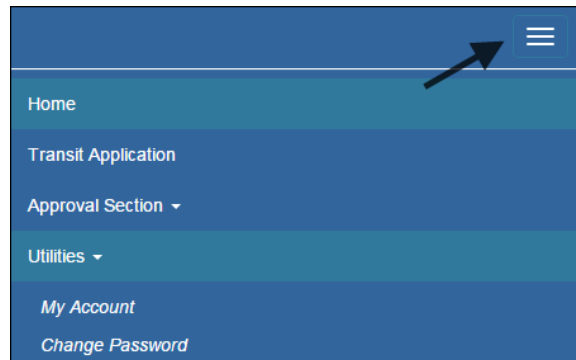
**Figure 7: Change Password Confirmation**

**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.

**Note:** The Password Expired label is only displayed when the password needs to be changed.

**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.



**Figure 8: Utilities Menu Options**

## 2.2 Password Recovery

Use the following steps to recover your password.

From the Login page; click the [Forgot Password?](#) Link. The Forgot Password page displays.

A screenshot of a web form titled 'Forgot Password'. The form is divided into two sections. The first section is 'Show Hint', which contains a text input field labeled '\*User Name:' with the placeholder text 'Government Email Address' and a blue 'Show Hint' button below it. The second section is 'Send It by Email', which also contains a text input field labeled '\*User Name:' with the placeholder text 'Government Email Address' and a blue 'Submit' button below it. Below the 'Submit' button, there is a small line of text: 'A temporary password will be sent to your E-Mail Account.' At the bottom right of the form, there is a link that says 'Return to Login Page'.

**Figure 9: Forgot Password page**

The Show Hint section allows the user to view the Hint entered when the password was last 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.

**Figure 10: Show Hint**

Send It By Email allows the user to retrieve a temporary password through email. The password is sent to the email address entered when the account was created. Enter your username and click the **Submit** button.

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

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

## 2.3 My Account

My Account allows the user to update personal information.

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

**Figure 11: Update My Account page**

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

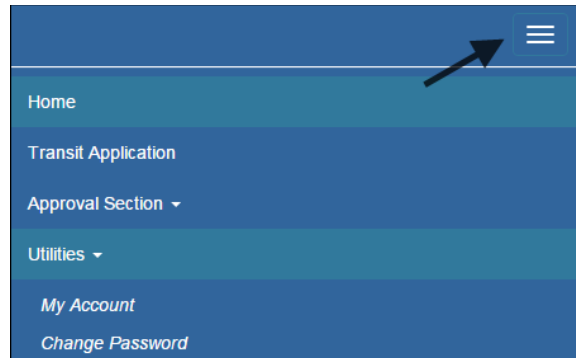
Click the **Update** button to save the changes. The account information is updated and the Home page is displayed with a confirmation message at the top of the page.

User kimberly.j.gravestest@va.gov has been Updated

**Figure 12: Update My Account Confirmation**

**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.

**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.




**Figure 13: Utilities Menu Options**

## 2.4 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.

## 2.5 Exit

- To exit the system from a desktop, click the **Logout** button on the 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.

## My Account

The My Account page allows the user to update personal information and to select a proxy. The functionality to assign a proxy is available for Approving Officials: Supervisors, Managers, and Program Admins.

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

**Figure 11: Update My Account page**

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

Click the **Update** button to save the changes. The account information is updated and the Home page is displayed with a confirmation message at the top of the page.



**Figure 12: Update My Account Confirmation**

## Proxy Feature

Use the following steps to select a proxy:

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

**Figure 13: Update My Account Information (Proxy)**

Available supervisor and/or managers will be displayed in the Add select box.

2. Select the proxy. Click the **Add** button to add the proxy to the column on the right.



**Figure 14: Selected Proxy**

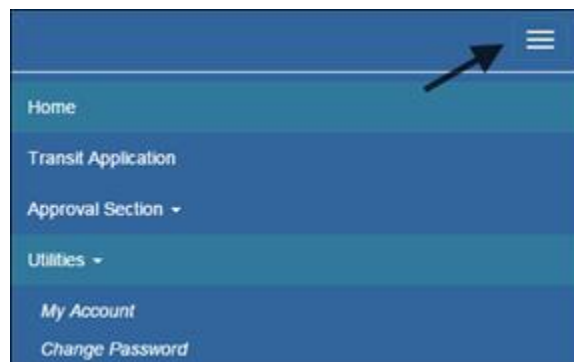
To remove a proxy from the column, select the proxy and click the **Remove** button.

Approvers that have the logged on user set as their proxy will be displayed below the table.



**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.

**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.



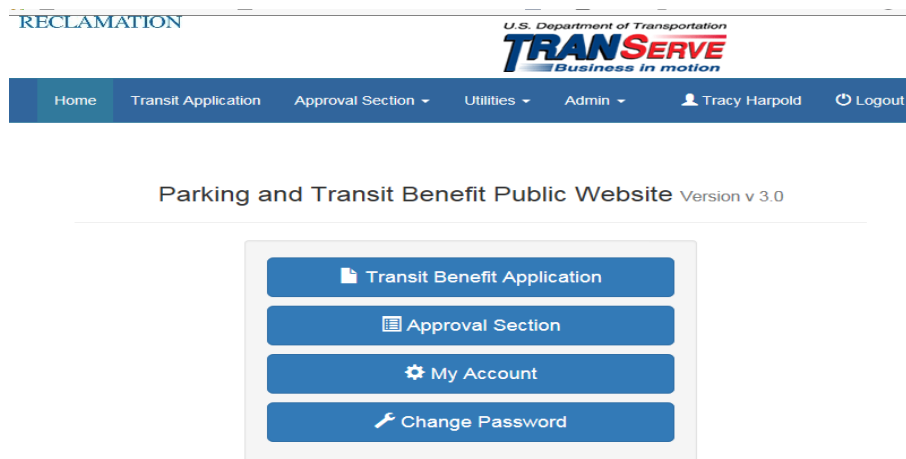
**Figure 15: Utilities Menu Options**

### 3. OVERVIEW OF THE HOME PAGE

The tabs and links available to you on the home page are determined by your assigned user role. User roles are assigned by TRANServe and the Agency Program Office.

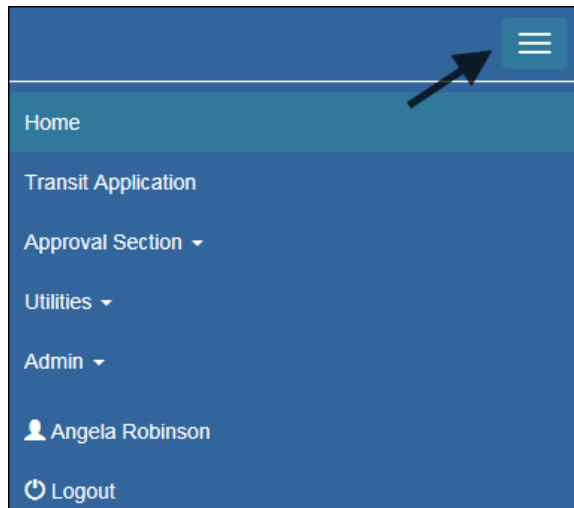
The home page is divided into two sections:

- The menu bar displays at the top of the page and displays the following:
  - ♦ Home – Click this tab to display the home page.
  - ♦ Transit Benefit Application – Click this tab to display the Select An Action To Continue page.
  - ♦ Approval Section – This functionality is only available for Approving Officials: Supervisors, Local/Regional Coordinators, and Program Admins. Click this tab to display the available approval levels. Approved Records, Disapproved Records and Competed Records can also be accessed from this tab.
  - ♦ Utilities – Click this tab to display My Account and Change Password sub-menu options.
  - ♦ Admin – This functionality is only available for administrators. Click this tab to display User Admin and/or Role Admin sub-menu options.
  - ♦ 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.
  - ♦ Approval Section – This functionality is only available for Approving Officials: Supervisors, Local/Regional Coordinators, and Program Admins. Click this button to display the first level approval page.
  - ♦ My Account – Click this button to display the My Account page.
  - ♦ Change Password – Click this button to display the Change Password page.
  - ♦ Log Out – Click this link to log out of the application system.



**Figure 14: 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.

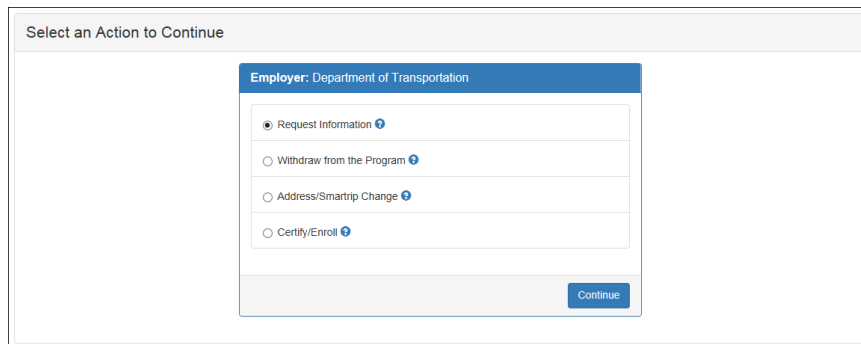


**Figure 15: Additional Menu Options**

### 3.1 Transit Benefit Application

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

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



**Figure 16: Select An Action To Continue page**

#### 3.1.1 Request Information

The applicant can request information from the Local/Regional Coordinator by submitting questions regarding the transit benefit program or a submitted application through the Point of Contact (POC).

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**

**Name:** Graves (Last) Kimberly (First) Jessica (Middle)

**Email Address:** kimberly.j.gravestest@dot.gov

**Agency:** Department of Transportation

**\*Point of Contact:**    
Click the Select button to select Point of Contact

**\*Question:**

**Figure 17: Request Information page**

If a Local/Regional Coordinator-Point of Contact has been selected it will pre-populate in the Local/Regional Coordinator-Point of Contact textbox. To select a Local/Regional Coordinator-Point of Contact, click the **Select** button to display the available Local/Regional Coordinator-Point of Contact in a separate window.

Select a Local/Regional Coordinator-Point of Contact from the list. This is also helpful if a Supervisor or Local/Regional Coordinator needs to locate a Local/Regional Coordinator-Point of Contact in another region.

Enter the question or concern in the Question textbox and click the **Send Request** button.

An email is sent to the selected Local/Regional Coordinator-Point of Contact. The Home page is displayed with a confirmation message at the top of the page.

Thank you, your request has been sent.

**Figure 18: Request Information Confirmation**



### 3.1.2 Withdraw from the Program

The applicant can submit a request to withdraw from the program at any time.

Select the Withdraw from the Program radio button.

Click the **Continue** button. The Withdraw From The Program page is displayed.

\*Withdrawal Date:

Click the Calendar to select a Withdrawal Date

\*Supervisor:  **Select...**

Click the Select button to select Supervisor

\*Local/Region Coordinator:  **Select...**

Click the Select button to select Local/Region Coordinator

Comment for Agency Approvers:

You have 1995 characters remaining

**Withdraw** **Cancel**

**Figure 19: Withdraw From The Program page**

Click the pop up calendar to select a withdrawal date.

Click the **Select** button to display the list for your agency's Supervisors.

Name	Email
KIM LYONS	kim.lyonstest@va.gov

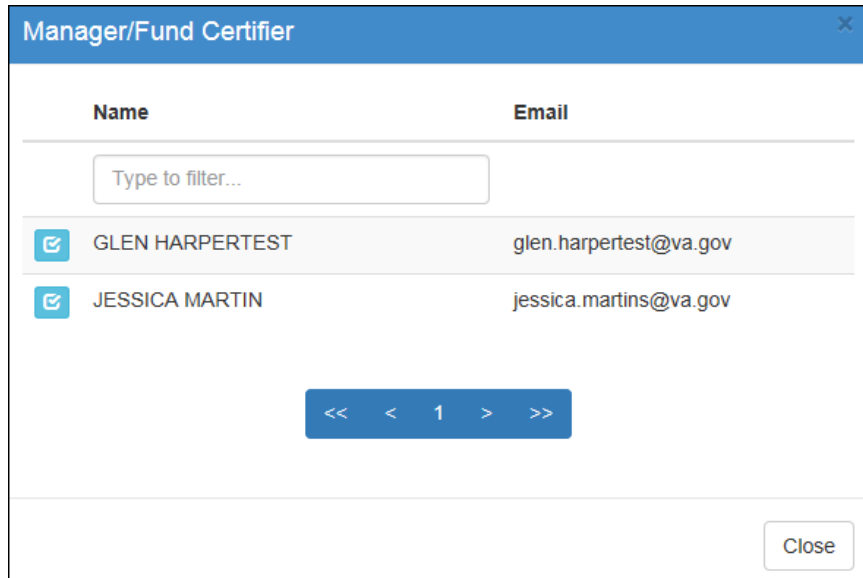
<< < 1 > >>

Close


**Figure 20: Supervisor (1<sup>st</sup> Approver)**

Select your Supervisor.

Click the **Select** button to display the list for your agency's Local/Regional Coordinator.

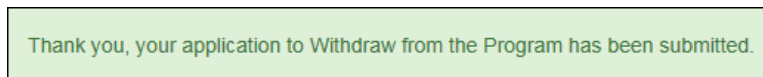


**Figure 21: Local/Regional Coordinator (2<sup>nd</sup> Approver)**

Select your Local/Regional Coordinator. 

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

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



**Figure 22: Withdraw Confirmation**

**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.*

### 3.1.3 Address/SmarterTrip® Change

The applicant can submit a request to update an address or SmarterTrip number (Washington DC-Region only) **DO NOT ENTER DEBIT CARD NUMBER**

Select the Address/ SmarterTrip® radio button.

Click the **Continue** button. The Change Address/ SmarterTrip® page is displayed.

The screenshot shows a web form titled "Address/Smartertrip Change". It is organized into four main sections:

- General Information:** Identifier (masked with \*\*\*\*), Name (Last: MARTINS, First: JESSICA), Email Address (Jessica.martins@treas.gov), Agency (Department of Treasury (TRE-HQ)), and Work Phone.
- Work Information:** Work Address, Work City, Work State (dropdown menu), and Work Zip.
- Residence Information:** Address, Address 2, City, State (dropdown menu), and Zip.
- SmarterTrip Information:** SmarterTrip Card Number.

At the bottom right of the form, there are two buttons: "Submit" and "Cancel".

**Figure 23: Change Address/ SmarterTrip® page**

Update the applicable information. Only update the section that needs to be changed. You are not required to complete an entirely new application.

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

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

**Figure 24: Address/ SmarterTrip® Confirmation**

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

### 3.1.4 Certify/Enroll

The Certify/Enroll allows the applicant to enroll in the transit benefit program by submitting an application.

Select the Certify/Enroll radio button.

Click the **Continue** button. The Warning page is displayed.



The screenshot shows a warning page with a red header "WARNING!". Below the header is a paragraph of text: "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." Below this text are five bullet points, each starting with "- I certify that...". The first bullet point is: "- I certify that I am employed by the U.S. Federal Government...". The second is: "- I certify that I am not named on a federally subsidized parking permit with any other federal agency." The third is: "- 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." The fourth is: "- 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." The fifth is: "- 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." The sixth is: "- I certify that my parking fees are not included in the computation of the daily, weekly or monthly commuting costs for my transit benefit." At the bottom right of the form are two buttons: "I Agree" (highlighted in blue) and "I Do Not Agree".

**Figure 25: Warning page**

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.*

**Certify/Enroll**

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

\*Reason for Certification:

Civilian/Military:

Work Status:

Transit Benefit Transportation Methods

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 before work.

\*Select your transportation methods:

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: \$

Transit Benefit Program Application

\*Identifier:

Name: SHEPARD (Last) HANK (First) V (Middle)

Email Address: hank.shepardtest@va.gov \*Work Phone:

\*Common Identifier:

Department of V.A.

\*Select Your Agency:  \*Region:

\*Admin:

Accounting Code:    
Click the Select button to select Accounting Code

Routing Symbol:    
Click the Select button to select Routing Symbol

Location/Building:    
Click the Select button to select Location/Building

I certify that my usual monthly Transit commuting costs are:    
This field is automatically calculated

**Work Information**

\*Work Address:

\*Work City:  \*Work State:  \*Work Zip:

**Residence Information**

\*Address:

Address 2:

\*City:  \*State:  \*Zip:

**Approver Information**

\*Approving Official:    
Click the Select button to select Approving Official

\*Manager/Fund Certifier:    
Click the Select button to select Manager/Fund Certifier

\*Point of Contact:    
Click the Select button to select Point of Contact

Manager Phone:

\*SmartTrip Card Number:

Comment for Agency Approvers:


You have 1995 characters remaining

**Figure 26: Transit Benefit Application Worksheet**


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

Select the reason for certification.

- ♦ Address or SmarTrip® Card Number Change – This selection is only used to make updates to the address or SmarTrip® card number. Do not select this reason if changing transportation amounts. This feature routes the application directly to TRANServe for faster processing.
- ♦ Agency Change
- ♦ Annual Certification/Recertification – This selection requires the applicant to certify to completion of the Transit Benefit Integrity Awareness training.
- ♦ Scan and email IntegrityTraining Certificate to the Local/Regional Coordinator.

Use the blue question mark next to each field for additional assistance. 

- ♦ New Transit Benefit Participant – This selection requires the applicant to certify to completion of the Transit Benefit Integrity training by scanning and emailing IntegrityTraining Certificate to the Local/Regional Coordinator.

Use the blue question mark next to each field for additional assistance. 

- ♦ Rate Change
- ♦ SmarTrip and Rate Change
- ♦ Select Employment Type. (This feature default to Civilian)
- ♦ Select your work status. (This feature defaults to Full Time)
- ♦ Full Time
- ♦ Part time
- ♦ Intern

Select your transportation method(s).

- ♦ Bus

Bus to Work:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Bus from Work:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Bus to Work:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Bus from Work:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly 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 home to work commute.				Total Monthly Expense: \$ 0.00

**Figure 27: Bus Method**

- ♦ Other Bus

Other Bus to Work:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Bus from Work:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly 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 home to work commute.				Total Monthly Expense: \$ 0.00

**Figure 28: Other Bus Method**

♦ Rail

Rail to Work:	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Rail from Work:	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly 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 home to work commute.				Total Monthly Expense: \$ 0.00

**Figure 29: Rail Method**

♦ Other Method

Other Method to Work:	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Method from Work:	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly 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 home to work commute.				Total Monthly Expense: \$ 0.00

**Figure 30: Other Method**

♦ Vanpool

Vanpool:	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
	Name of Company	Daily Expense	Days per Month	Monthly 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 home to work commute.				Total Monthly Expense: \$ 0.00

**Figure 31: Vanpool Method**

**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.

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 32: Sample Agency Work Schedule Policies**

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

Enter the name of the Transit Authority-

If monthly pass is purchased indicate next to name of the Transit Authority- example: RTD Monthly, Marta-Monthly.

Enter Monthly cost

Enter number of days per month (max 20) you commute home/work

If daily pass is purchased enter in daily cost

Enter number of days per month (max20) you commute home/work

Rail to Work:	BTW	\$ 3.20	16	\$ 51.20
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Rail from Work:	BTW	\$ 3.20	16	\$ 51.20
	Name of Company	Daily Expense	Days per Month	Monthly 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 home to work commute.				Total Monthly Expense: \$ 102.40

**Figure 33: Method of Transportation Table**

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

Enter the Identifier. This may be the last four digits of your social security number, your employee identification number or another indicator specified by your Agency. If not sure, you may check the help menu.

Enter the Common Identifier. This is information used to activate the TRANServe Card. The card activation key may be a word phrase or number. If not sure, you may check the help menu.

Select the Region associated with your Point of Contact, refer to field below to find your region next to your Point of Contacts name:

**Approver Information**

\*Supervisor:   Click the Select button to select Supervisor

\*Local/Region Coordinator:   Click the Select button to select Local/Region Coordinator

\*Point of Contact:   ← Click the Select button to select Point of Contact

Manager Phone:


Admin- will auto populate.

Click the **Select** link to display a list of each portion of accounting for your agency, must update each portion.

Fund/Cost Center:   ← Click the Select button to select Fund/Cost Center

Functional Area:   ← Click the Select button to select Functional Area


G/L Account:   ← Click the Select button to select G/L Account

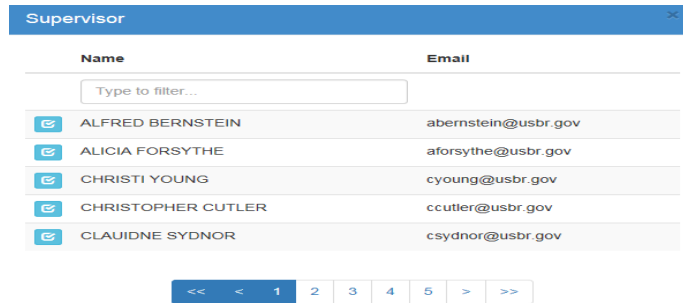
Use the blue question mark next to each field for additional assistance. 






Enter your Work Information.

Enter your Residence Information. (The address from which you routinely commute)





Click the **Select** button to display the list of agency **Supervisors**. Only select your supervisor. Use the blue question mark next to each field for additional assistance. 

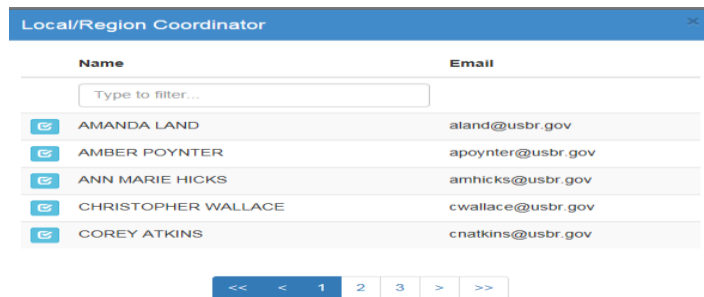







Supervisor	
Name	Email
<input type="text" value="Type to filter..."/>	
 ALFRED BERNSTEIN	abernstein@usbr.gov
 ALICIA FORSYTHE	aforsythe@usbr.gov
 CHRISTI YOUNG	cyoung@usbr.gov
 CHRISTOPHER CUTLER	ccutler@usbr.gov
 CLAUDINE SYDNOR	csydnor@usbr.gov

**Figure 34: Supervisor**

Select your Supervisor, if you do not see your supervisor, click on the blue question mark  for directions.

Click the **Select** button to display the list for your agency's **Local/Regional Coordinators**, if you do not see your Local/Regional Coordinator, click on the blue question mark  for directions.

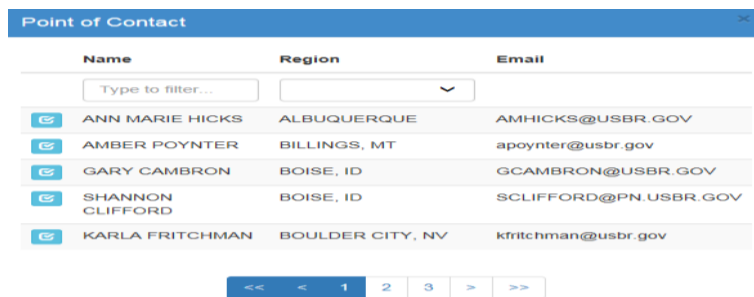







Local/Region Coordinator	
Name	Email
<input type="text" value="Type to filter..."/>	
 AMANDA LAND	aland@usbr.gov
 AMBER POYNTER	apoynter@usbr.gov
 ANN MARIE HICKS	amhicks@usbr.gov
 CHRISTOPHER WALLACE	cwallace@usbr.gov
 COREY ATKINS	cnatkins@usbr.gov

**Figure 35: Local/Regional Coordinator**

Select your Local/Regional Coordinator.


Click the **Select** button to display the list for your agency's **Points of Contact**.



Point of Contact		
Name	Region	Email
<input type="text" value="Type to filter..."/>	<input type="text" value=""/>	
 ANN MARIE HICKS	ALBUQUERQUE	AMHICKS@USBR.GOV
 AMBER POYNTER	BILLINGS, MT	apoynter@usbr.gov
 GARY CAMBRON	BOISE, ID	GCAMBRON@USBR.GOV
 SHANNON CLIFFORD	BOISE, ID	SCLIFFORD@PN.USBR.GOV
 KARLA FRITCHMAN	BOULDER CITY, NV	kfritchman@usbr.gov

**Figure 36: Points of Contact**

Select your Point of Contact- **the same name as your Local/Regional Coordinator.**

**For NCR participants – (Washington DC)** enter your Registered SmarTrip® card information. Please click on the  to enter the correct format of card number. All Regional or Debit Card participants enter -NA. DO NOT ENTER DEBIT CARD NUMBER.

Type #1: 012345678 C3DW803 = **012345678**

Type #2: C3DW017 0020 0001 5644 364 6 = **015644364**

Type #3: GD1137 0167 0693 4564 7992 9601 = **01670693456479929601**

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

**Transit Benefit Program Application**

\*Identifier:

Name: RODRIGUEZ KAREN LYNN LEE  
(Last) (First) (Middle)

Email Address: Karen.rodriqueztest@treas.gov \*Work Phone: (202) 555-7764

\*Common Identifier: HELLOKITTY

---

**Department of Treasury**

\*Select Your Agency: TRE-HQ \*Region: DC

\*Admin: TREASURY  
Populates from Select Your Agency

Accounting Code:    
Click the Select button to select Accounting Code

Routing Symbol:    
Click the Select button to select Routing Symbol

Location/Building:    
Click the Select button to select Location/Building

I certify that my usual monthly Transit commuting costs are: \$ 102.40  
This field is automatically calculated

I certify that my usual monthly Parking commuting costs are: \$ 192.00  
This field is automatically calculated

---

**Work Information**

\*Work Address: 123 TEST STREET

\*Work City: WASHINGTON \*Work State: DC \*Work Zip: 20590

---

**Residence Information**

\*Address: 505 GAYLEY AVENUE

Address 2:

\*City: LOS ANGELES \*State: CA \*Zip: 90024

---

**Approver Information**

\*Approving Official: CAREY, HARRY   
Click the Select button to select Approving Official

\*Manager/Fund Certifier: CHANG, DARREN   
Click the Select button to select Manager/Fund Certifier

\*Point of Contact: TREASURY POC   
Click the Select button to select Point of Contact

Manager Phone:

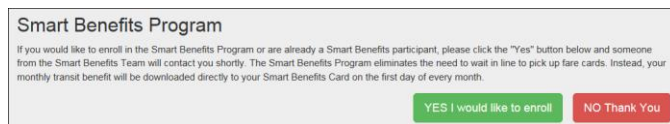
---

\*SmarTrip Card Number: 000123456

Comment for Agency Approvers: HELP ME HELP YOU  
You have 1979 characters remaining

**Figure 37: Completed Transit Benefit Application**

Click the **Continue** button. The SmartBenefits® Program page is displayed, if you have selected the box that indicates you are a SmartBenefits Participant.



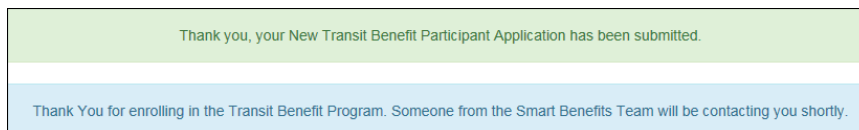
**Figure 38: SmartBenefits® Program page**

Click the **YES I would like to enroll** button to join the SmartBenefits® program. By clicking yes, you agree to have your transit benefit downloaded to your SmarTrip® card the first of every month. (Mandatory for methods that accept SmarTrip®)

Click the **NO Thank You** button if you do not want to join the SmartBenefits® program.

**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.

After clicking the **YES** or **NO** button, a confirmation message is displayed.



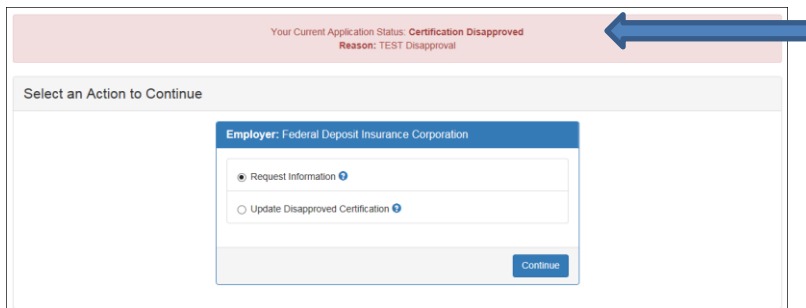
**Figure 39: Transit Benefit Program Confirmation**

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

### 3.1.5 Disapproved Applications

Applications that have been Disapproved are sent back to the applicant. The applicant must make 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.



**Figure 40: Select An Action To Continue page**

Select the Update Disapproved Application radio button.

Click the **Continue** button. The Warning page is displayed.

**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.

**Figure 41: Warning page**

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 return to the Select An Action To Continue page.*

Denial Application and Start Over

Disapproved Reason: trace

\*Indicates required field

**Certify/Enroll** | Status: Certification Disapproved

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

\*Reason for Certification:

Citizen/Military:

Work Status:

Transit Benefit Transportation Methods

Always follow your Agency's 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.

\*Select your transportation methods:

Mode	Name of Company	Daily Expense	Days per Month	Monthly Expense
To Work	BRT	\$ 4.00	18	\$ 72.00
From Work	BRT	\$ 4.00	18	\$ 72.00

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:

Transit Benefit Program Application

Disapproved Reason: trace

\*Identifier:

Name:  (Last) (First)

Email Address:  Work Phone:

\*Common Identifier:

Federal Deposit Insurance Corporation

\*Select Your Agency:  \*Region:

\*Address:  Populates from Select Your Agency

Accounting Code:

Click the Select button to select Accounting Code

I certify that my usual monthly Transit commuting costs are:  This field is automatically calculated.

I acknowledge my commuting costs are above the current \$150.00 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.

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

**Work Information**

\*Work Address:

\*Work City:  \*Work State:  \*Work Zip:

**Residence Information**

\*Address:

Address 2:

\*City:  \*State:  \*Zip:

**Approver Information**

\*Approving Official:   \*Manager/Fund Certifier:

Click the Select button to select Approving Official

Click the Select button to select Manager/Fund Certifier

\*Point of Contact:   Manager Phone:

Click the Select button to select Point of Contact

\*SmartTag Card Number:

Comment for Agency Approver:

You have 1995 characters remaining

**Figure 42: Disapproved Transit Benefit Application Worksheet**

- ♦ The reason the application was disapproved is displayed at the top of the Transit Benefit Application Worksheet and the Transit Benefit Program Application.
- ♦ The information the applicant entered when the application was submitted is displayed. Make the required 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 revert the application back to the last submitted application. If this is your first application using this system, only the Profile information will display.

## 4. APPROVAL SECTION

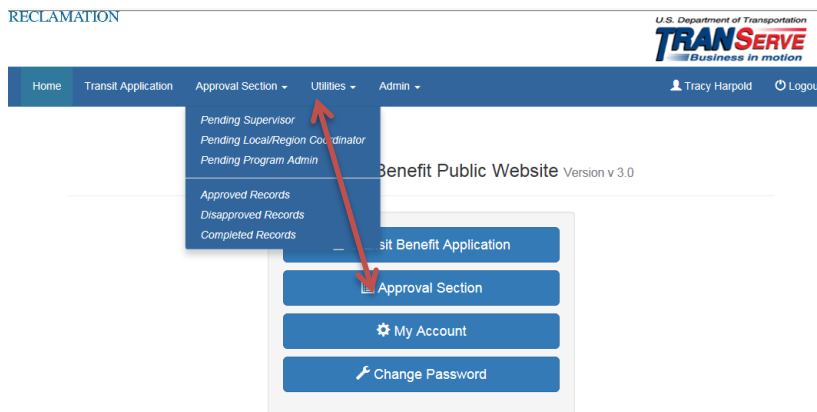
The Approval Section allows the authorized user to view, approve or disapprove a transit benefit application. The 1<sup>st</sup> Approver must be a **Supervisor**, the 2<sup>nd</sup> Approver must be a **Local/Regional Coordinator**, within the agency to which the application is being submitted. These roles are assigned by the TRANServe Transit Benefit Manager assigned to the Agency or the Agency Transit Benefit Program Office.

*Note: Approvers are unable to view or approve their own transit benefit application in an approval queue. 1<sup>st</sup> and 2<sup>nd</sup> Approvers will only see an application on which an employee has chosen their name.*

### 4.1 Approval Process

Log on as to approve applications.

Enter your approval section or queue, through either options:



Click on Pending Supervisor or Pending Local/Regional Coordinator to open queue to display applications awaiting your approval.

1. The number of applications awaiting review and approval is displayed next to the page title.

Pending Transit Application **8**

2. The view below shows:

The agency

The date the application was submitted by participant

The reason the application was submitted

The name of the participant

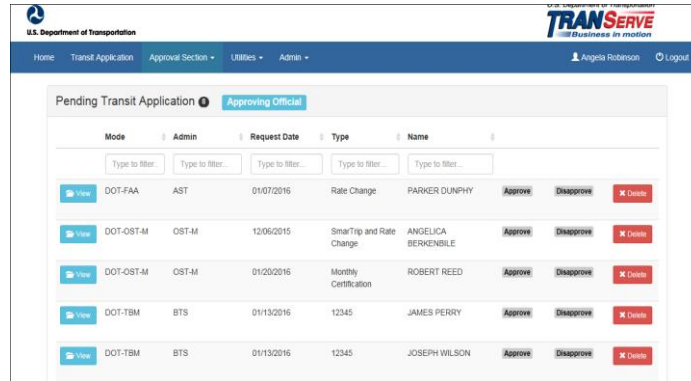
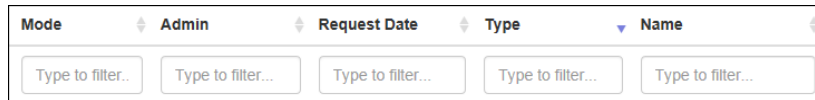


Figure 43: Approval page

Use the sort feature to help you locate applications.

- Note:** Click the column header, and then click the arrow next to the column header to sort applicants in ascending or descending order.



**Note:** Applicants can be filtered by entering in the first few letters of the Mode (Agency Name), Admin, Type, and Name. To filter by date, enter in the date the application was submitted in the Request Date filter textbox.

- Approving roles for Supervisors and Local Regional Coordinators

Supervisors- Only approve your employee’s application

Disapprove all applications that are NOT your employee

Employee is a Federal Employee

Local/Regional Coordinators- verify the Integrity Training Certificate is on file

Disapprove all applications who have not completed Intergrity Training

Commuting information:

<b>Bus to Work:</b>	Metrobus	\$1.75	23	\$40.25
	<i>Name of Company</i>	<i>Daily Expense</i>	<i>Days per Month</i>	<i>Monthly Expense</i>
<b>Bus from Work:</b>	Metrobus	\$1.75	23	\$40.25
	<i>Name of Company</i>	<i>Daily Expense</i>	<i>Days per Month</i>	<i>Monthly Expense</i>
<b>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.</b>				<b>Total Monthly Expense:</b> \$80.50

Supervisors- Expense Sheet includes the following information:

- Name of Transit Authority
- Includes expenses for to work and from work- or indicates Monthly pass
- Days per Month reflects participants work schedule – the number of days the participant commutes to and from work per month.

Local/Regional Coordinators- Expense Sheet includes the following information:

- Name of Transit Authority
- Includes expenses for to work and from work- or indicates Monthly pass
- The cost of the transit is what is most Cost Effective for the government, should a monthly pass be purchased in the place of purchasing a daily pass.

Note: Disapprove the application if any of the above is incorrect, please advise participant exactly what to update or change.

There are five fields Supervisors and Local/Regional Coordinators can update or make corrections:

Supervisors : Make corrections to each accounting field below that is incorrect.

Department of Transportation

\*Select Your Agency:  \*Region:



\*Bureau:

Populates from Select Your Agency

Fund/Cost Center:



Click the Select button to select Fund/Cost Center

Functional Area:



Click the Select button to select Functional Area

G/L Account:



Click the Select button to select G/L Account

I certify that my usual monthly Transit commuting costs are:

\$ 100.00

This field is automatically calculated

*The Region – Local/Regional Coordinators are required to update according to the region assigned, please check the Point of Contact drop down to find the Region assigned to you.*

*Accounting information- Supervisors are required to make corrections to incorrect accounting codes. The accounting codes are now divided into three categories, if you disapprove and ask participant to correct, please provide the correct code.*

If any section of accounting code is not listed, please email the Main Coordinator listed on page one.



## Approval Section:

### Approver Information

Supervisor:	DUCHESNE, MATTHEW STEPHEN	Local/Region Coordinator:	ROACH, KASANDRA
Point of Contact:	KASANDRA ROACH	Manager Phone:	
SmartTrip Card Number:	01670872563247786248		
Comment for Agency Approvers:	Transit subsidy training practice		

Supervisors and Local/Regional Coordinators - *The Local/Regional Coordinator and the Point of Contact fields must contain the same approver. Example above.*

Disapprove if approvers do not reflect the same approvers in these fields and instruct participant to select their Local/Regional Coordinator in the Point of Contact field.

*Smart Trip Card field.* Regional and Debit Card participants enter – **NA DO NOT ENTER DEBIT CARD NUMBER.**

SmartTrip Card Number:	01670872563247786248
Comment for Agency Approvers:	Transit subsidy training practice

Check the format of the Smart Card to reflect on of the formats below:

5. Type #1: 012345678 C3DW803 = **012345678**
- Type #2: C3DW017 0020 0001 5644 364 6 = **015644364**
- Type #3: GD1137 0167 0693 4564 7992 9601 = **01670693456479929601**

- b. Disapprove any application that includes a Debit Card number- all Debit card numbers begin with 44. Advise participant to correct and add NA in this field.

Review according to instructions included in this guide and then select Approve to approve the application. After the selection is made the label will change into a checkmark.

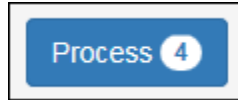


Review according to instructions included in this guide then select Disapprove to disapprove the application. After the selection is made the label will change into a checkmark.



- ♦ A reason is required when an application is disapproved. Enter a reason in the Reason textbox. Give specific instructions for correction. (i.e. Correct Supervisor's name)

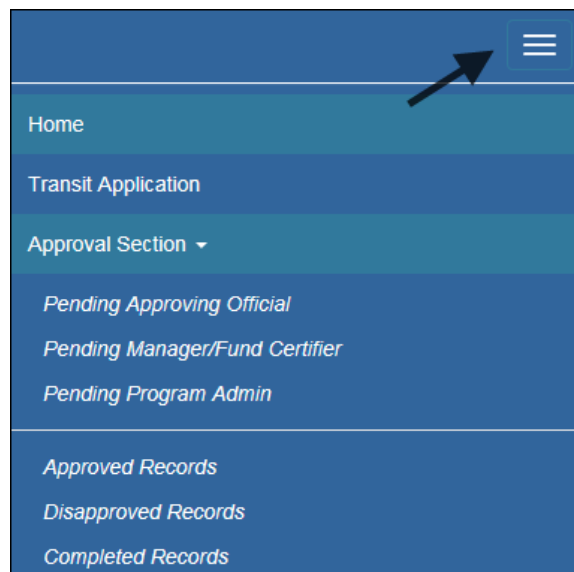
The number of applications approved or disapproved is displayed next to the **Process** button.



Click the **Process** button to approve or disapprove the application.

**Note:** Applications can be reviewed, approved or disapproved on the Transit Benefit Worksheet/Application page by clicking the **View** button for the desired applicant.

**Note:** To access the additional Approval Section menu options from a mobile device; click the additional menus button at the top of the page. Click the Approval Section dropdown arrow to display the sub-menus. Click the sub-menu to enter the appropriate Approval Queue to review an application.



**Figure 44: Approval Section Menu Options**

## 4.1.1 Delete Application

Note: In most cases the applicant should delete their application to begin again. There are times when an approver will need to delete an application. (i.e. an employee separates and the application is still attached to an approver queue, sending the approver reminders.)

Click the **Delete** button. The Delete Confirmation is displayed.

Figure 45: Delete Confirmation page

Click the **Continue** button to delete the application. The approval page is re-displayed with the delete confirmation at the top of the page.

**Note:** The submitted application will be deleted and the applicant will need to resubmit an application for transit benefits.

## 4.2 Approved/Disapproved/Completed Records

- ♦ From the Home page; hover over the Approval Section menu option. Select the type of records to be viewed by selecting the link name. (Approved, Disapproved or Completed)

Mode	Admin	Request Date	Type	Name	Approval Date		
View	DOT-OST-M	OST-M	05/19/2014	New Transit Benefit Participant	RAE SUNSHINE	05/19/2014 03:55:20 PM	Delete
View	DOT-OST-M	OST-M-01	01/13/2016	12345	HUNG_TEST CHUN	01/13/2016 01:15:53 PM	Delete
View	FDIC		12/22/2015	New Transit Benefit Participant	KAMERON GRETCHENTEST	01/07/2016 01:06:24 PM	Delete

Figure 46: Approved Records

Mode	Admin	Request Date	Type	Name	Reason	
View	DOT-OST-M	OST-M-01	07/07/2015	SmarTrip and Rate Change	MOBILE APPTTEST TEST	Delete
View	ED	OUS	10/30/2015	Rate Change	DARREN CHANG ghfcgntfng	Delete
View	FDIC	DC	10/29/2015	Rate Change	PAMELA LIPSCOMBS TEST Disapproval	Delete

Figure 47: Disapproved Records

- ◆ When the Completed Records link is selected; the Find Completed Applications page is displayed. Enter a First Name, Last Name, or select DOI-NIGC from the dropdown to limit the search results. Click the **Search** button to return all completed records.

**Figure 48: Find Completed Applications page**

**Note:** Enter at least one search criteria. If no search criteria are entered the system will retrieve and display all completed records. This load may be quite time consuming.

Mode	Admin	Request Date	Type	Name
<a href="#">View</a> DOD-NCR	A-NGB	12/30/2015	Agency Change	ANNIE AARON
<a href="#">View</a> DOT-FTA	FTA	09/03/2015	TEST CERTIFICATION	HUNG CHUN
<a href="#">View</a> DOT-FTA	FTA	09/04/2015	Agency Change	HUNG CHUN

**Figure 49: Completed Records**

## 5. ADMIN

The Admin function allows the Program Office to elevate Supervisors and Local/Regional coordinator.

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

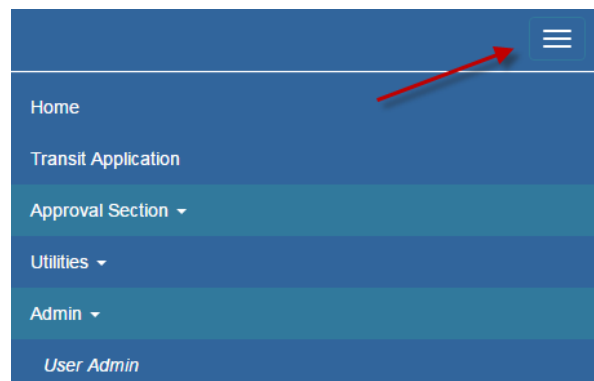
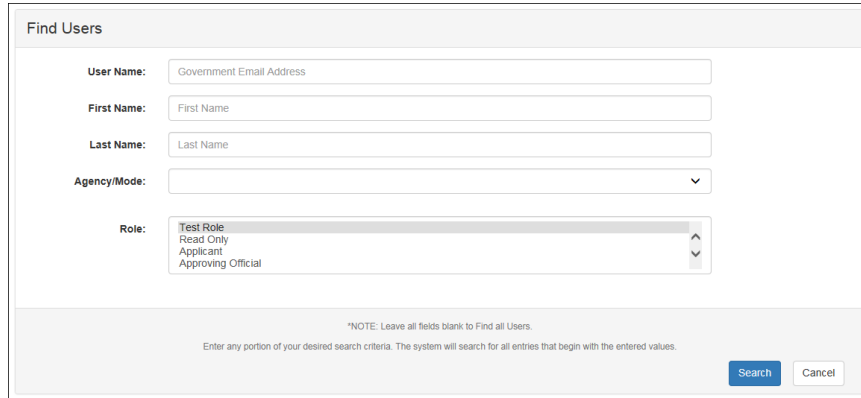


Figure 50: Admin Menu Options

## 5.1 User Admin

Mouse over the Admin menu bar; select the User Admin option. The Find Users page displays.



Find Users

User Name: Government Email Address

First Name: First Name

Last Name: Last Name

Agency/Mode: [Dropdown]

Role: Test Role, Read Only, Applicant, Approving Official

\*NOTE: Leave all fields blank to Find all Users.  
Enter any portion of your desired search criteria. The system will search for all entries that begin with the entered values.

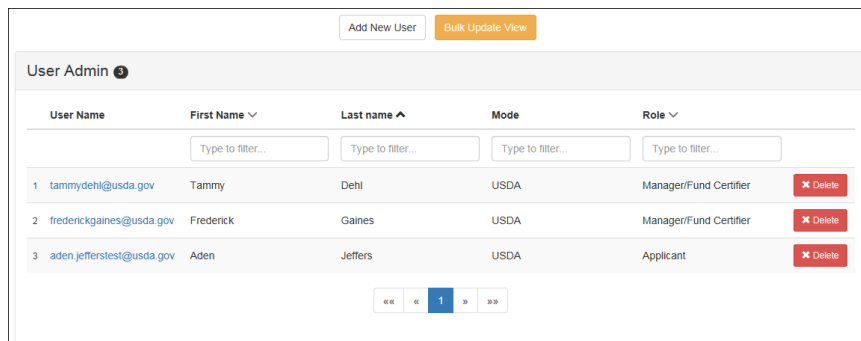
Search Cancel

Figure 51: Find Users page

To search for an existing user; enter the Username, First Name, Last Name, or select an DOI-NIGC or Role from the dropdown menu.

Click the **Search** button. The Search Results page displays.

**Note:** At least one search criteria field should be entered; if no search criteria are entered the system will retrieve and display all users. This load may be quite time consuming.



Add New User Bulk Update View

User Admin

User Name	First Name	Last name	Mode	Role	
1 tammydehl@usda.gov	Tammy	Dehl	USDA	Manager/Fund Certifier	Delete
2 frederickgaines@usda.gov	Frederick	Gaines	USDA	Manager/Fund Certifier	Delete
3 aden.jefferstest@usda.gov	Aden	Jeffers	USDA	Applicant	Delete

« « 1 » »

Figure 52: Users Search Results page

**Note:** Applicants can be filtered by entering in the first few letters of the Mode, First Name, Last Name, and Role.

### 5.1.1 Add User

From the User Admin page; click the **Add New User** button. The Account Information page displays.

**Figure 53: Add User Account Information page**

Enter the applicant’s official government email address in the User Name textbox.

Complete the account information form.

Select the user role from the Role dropdown.

Click the **Add User** button. The Add User Confirmation displays.

**Figure 54: Add User Confirmation**

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

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

**Note:** This page can also be accessed by hovering over the Admin menu option and clicking the Add New User sub-menu option. In most cases all users should create their own profile using the Registration process on the login page. When an Admin creates a new user, they also create a communication chain to inform and educate the user to obtain the password through their official government email address. This slows the process and also defeats the control point of the user providing all certified information.

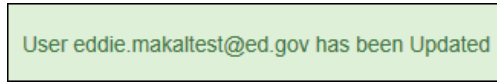
## 5.1.2 Update User

From the User Admin page; click the [Username](#) link. The Update User Account Information page displays with the applicant’s information.

**Figure 55: Update User Account Information page**

Update the applicant's user information.

Click the **Update User** button. The Update User Confirmation displays.



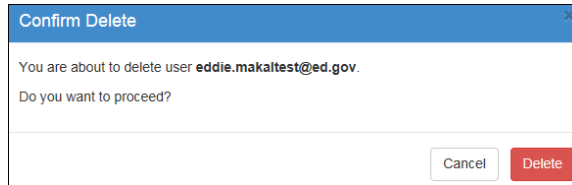
**Figure 56: Update User Confirmation**

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

**Note:** After the Add User button is clicked the page re-displays as the Update User Account Information page. Updates can be made on this page.

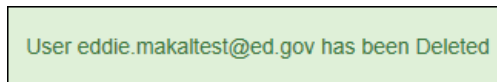
### 5.1.3 Delete User

From the User Admin page; click the **Delete** button. The Confirm Delete message displays.



**Figure 57: Confirm Delete Message**

Click the **Delete** button to confirm deletion. The Delete Confirmation is displayed.

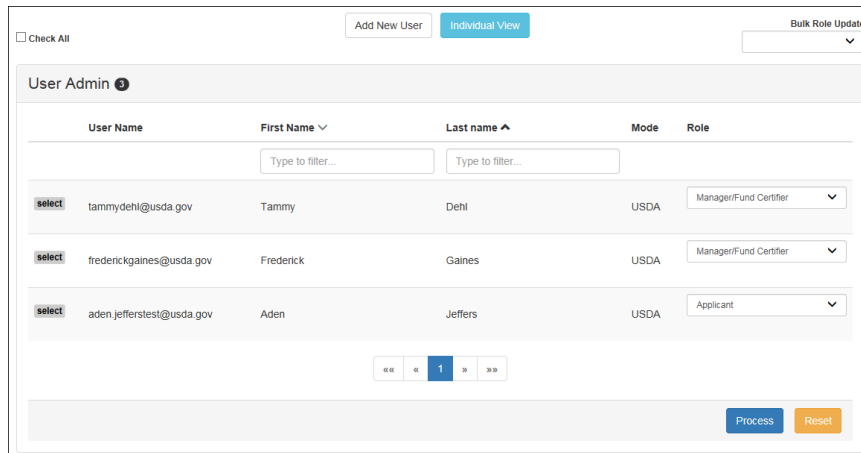


**Figure 58: Delete Confirmation**

### 5.1.4 Bulk Update View

The Bulk Update View allows the administrator to update multiple user roles at one time.

From the User Admin page; click the **Bulk Update View** button. The Bulk Update View page displays.



**Figure 59: Bulk Update View page**

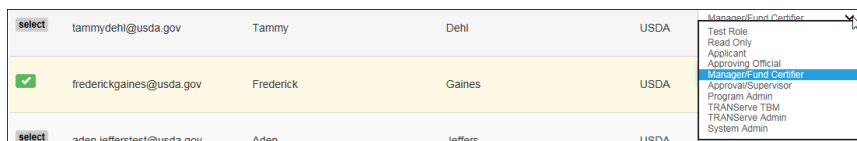
### 5.1.4.1 Single User Role Update

Click the **Select** button next to the username. The button changes to a check mark after it is selected.



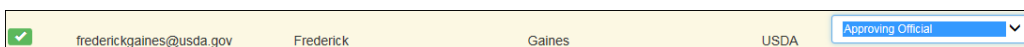
**Figure 60: Single Username Select**

Click the down arrow for the User Role dropdown menu.



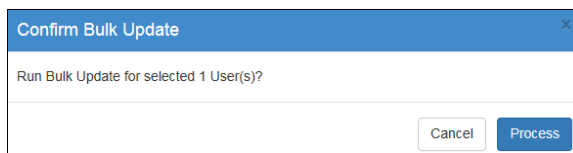
**Figure 61: Role Change Select**

Select the desired user role from the dropdown menu.



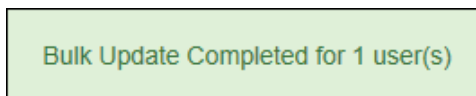
**Figure 62: Role Update**

Click the **Process** button. The Confirm Bulk Update message is displayed.



**Figure 63: Confirm Bulk Update Message**

Click the **Process** button to confirm the update and close the dialog box. A confirmation message is displayed at the top of the page.



**Figure 64: Role Update Confirmation**

**Note:** If the user is associated with an Agency that has multiple Modes/Agency Names, the Mode can be updated using the same steps used to update the User Role.



**Figure 65: Multiple Modes**

### 5.1.4.2 Multiple User Role Update

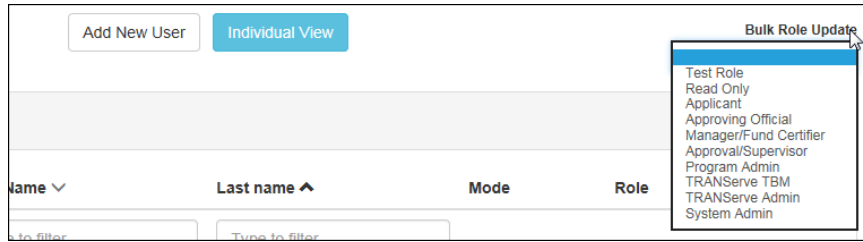
Click the **Select** button next to the usernames. The button changes to a check mark after it is selected.





**Figure 66: Multiple Username Select**

Click the down arrow for the Bulk Role Update dropdown menu at the top of the page.



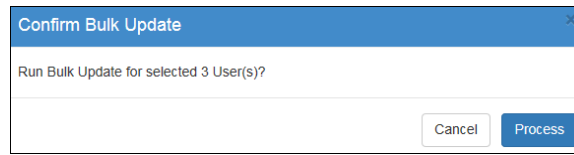
**Figure 67: Bulk Role Update Select**

Select the desired user role from the dropdown menu.

<input checked="" type="checkbox"/>	emma.clarkson@treas.gov	Emma	Clarkson	TRE-HQ	Read Only
<input checked="" type="checkbox"/>	timothy.cole@treas.gov	Timothy	Cole	TRE-HQ	Read Only
<input checked="" type="checkbox"/>	kevin.drummond@treas.gov	Kevin	Drummond	TRE-HQ	Read Only

**Figure 68: Bulk Role Update**

Click the **Process** button. The Confirm Bulk Update message is displayed.



**Figure 69: Confirm Bulk Update Message**

Click the **Process** button to confirm the update and close the dialog box. A confirmation message is displayed at the top of the page.

**Note:** *Program Admins can only update user roles below the Program Admin level within their Agency.*

*TRANServe Admins can only update user roles below the TRANServe Admin level.*

*TRANServe Transit Benefit Managers can only update user roles below the TRANServe TBM level.*

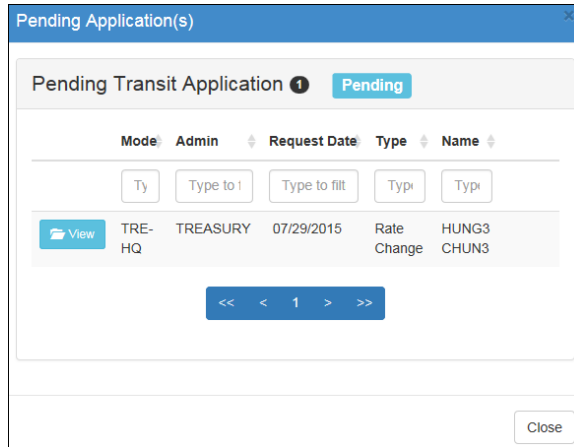
### 5.1.4.3 Role Update Lock

Approvers that have applications in pending status cannot have their roles updated. This will ensure that applications are not orphaned when user roles are changed. This includes applications that are anywhere in the approval process. The number of pending applications is displayed in place of the **Select** button.

1	james.hamilton@treas.gov	James	Hamilton	TRE-HQ	Approving Official
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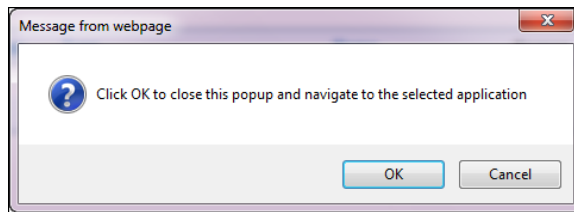
**Figure 70: Pending Application Link**

Click the number next to the username to display the Pending Transit Benefit Application Status page.



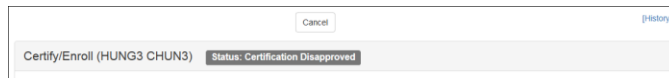
**Figure 71: Pending Transit Benefit Application Status page**

Click the **View** button next to the applicant’s name. A confirmation message is displayed. Click the **OK** button.

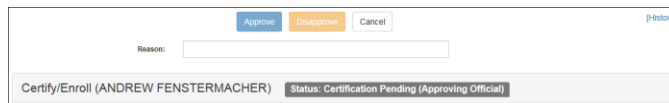


**Figure 72: Open Application Confirmation Message**

The application is opened. If the status is at the final approving level the application is approved and will display the status at the top of the page (i.e. CERTIFICATION DISAPPROVED or WITHDRAWAL APPROVED).



If the application needs further approval the buttons will display at the top of the page along with the pending certification level.



## APPENDIX A: SMARTRIP CARD INSTRUCTIONS

For SmartBenefit Participants: Purchase and Register a SmarTrip® card

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

Purchase a SmarTrip® Card – This is a reloadable electronic fare card. Using a reloadable card supports government initiatives to support and improve the environment through more sustainable practices.

- ♦ a. You can purchase 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 requires you to provide a shipping address which must match the billing address on line with your credit card provider.

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:

Type #1: 012345678 C3DW803 = **012345678**

Type #2: C3DW017 0020 0001 5644 364 6 = **015644364**

Type #3: GD1137 0167 0693 4564 7992 9601 = **01670693456479929601**

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

TIP 2: If your SmarTrip® (or CharmCard) serial number is fewer than nine (9) digits, you need to add zero(s) to the front to make it nine (9) digits.