OM

Security, Facilities and Logistics Services Division Transportation Services Branch



TRANSIT BENEFIT APPLICATION GUIDE

Have a Question about Transportation? Contact the Transportation Services Branch! <u>OMMSTransportationservices@ed.gov</u> 202-401-2905 or 202-401-3861



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INTRODUCTION

1.1 PURPOSE

The purpose of this document is to guide the user on how to apply for the Department of Education's Transit subsidy program. The Transit Benefit application process consists of three steps:

1) Completion of the Integrity Awareness Training via the Talent Management System (TMS),

2) Register via TRANServe website, and

3) Complete and submit application via online TRANServe website.

1.2 BACKGROUND

The Department of Education offers a monthly allotment of up to one hundred and twentyfive (\$125) to assist employees with home to work commuting costs.

1.3 PAYMENT OPTIONS

There are two payment options:

SMARTrip Card (Smart Benefits DC are only)	TRANServe Debit Card (Nation- wide)
Download and view transit benefit balance here	AND
 Purchase at Metro Station or CVS 10 business days to receive benefits (auto-load via metro gate turnstile) Benefits auto-load on the first of the month (smart benefits balance viewed ONLY via metro gate turnstile display panel) Separates personal and transit benefit funds IMPORTANT: Register SMARTrip card before completing application. Register: click <u>"Register Smartrip"</u> or contact 888-762-7874. 	 15-30 business days to receive card Widely accepted by transit authorities Online payment options IMPORTANT: Card is allotted funds on 10th of every month. Any remaining balance is credited back to agency on the 9th of every month. Example: Funds added on the month of January 10, is for the month of February.



2 APPLICATION PROCESS

2.1 COMPLETE INTEGRITY AWARNESS TRAINING

Complete Transit Benefit Integrity Awareness Training via TMS.

NOTE: Interns will need to obtain the Power Point version of the Integrity Awareness Training from Executive Officer or contact OMMSTransportationservices@ed.gov.

Log on to http://transerve.dot.gov

Click on "Participants"





Scroll down until you see Education Click on "EDUCATION" Click on "Transit Benefit Integrity Awareness Requirement (TMS)"

dot.gov/participants.html					
CPSC	ISB-2015-13K Daily Parking Pre Payments Deviced				
DHS-ICE	 <u>- Revised</u> <u>TSB-2015-12R Bicycle Benefit Claim 2015 -</u> Boving 				
DHS-CIS	TSB-2015-11R CyberSecurity Upgrade –				
DISA DEC (East Manda)	Revised				
DISA-REG (Fort Meade)	<u>TSB-2015-11 CyberSecurity Upgrade</u>				
DOC-ESA	<u>TSB-2015-10 Federal Protective Services</u> Garage Patrol				
DOC-NOAA	<u>TSB-2015-09 Special Event Dates for</u> Sycours				
DOC-OIG	 <u>FY2015</u> TSB-2015-08 Appounding DOT 2015 Transit 				
	Benefit Recertification				
DOC-OS	1. DOT Recertification Guide				
DOI-USGS	2. DOT Q & A Sessions Schedule				
	• TSB-2015-07 Increased Garage Traffic				
	<u>TSB-2015-06 DOT HQ Parking and Transit</u> <u>Benefit (PTB) System Conversion</u>				
	<u>TSB-2015-05 DOT HQ Parking and Transit</u> Parefit System Maintenance Shuddaum				
Education The second	TSB-2015-04 Bicycle Benefit Claims				
Transit Benefit Integrity Awareness Requirement (TMS)	TSB-2015-03 DOT HQ Parking Policy Rev.				
<u>Transit Benefit Program Application System</u>	and New Vehicle Barriers Operational				
<u>Transit Benefit Applicant's Guide</u>	Unanges				
How to Register your SmarTrip Card	TheBus Monthly Bus Passes with				
Email: <u>OMMSTransportationServices@ed.gov</u>	TRANServe's Debit Card				
Phone: 202-401-2905	<u>TSB-2015-01 Closure M Open House</u>				
ED Transportation Services Survey	<u>TSB-2014-10 ORCA ALERT</u>				
ED Transit Benefit Program Intranet Policies and Procedures	<u>TSB-2014-09 Bicycle Benefit Claims</u>				
EEOC	<u>TSB-2014-08 Password Compliance</u>				
	 <u>TSB 2014-07 DOT Annual Transit Benefit</u> 				

CLICKING ON "TRANSIT BENEFIT INTEGRITY AWARENESS REQUIREMENT" WILL REDIRECT YOU TO THE TMS WEBSITE (separate website from TRANServe).



Log into TMS

- Your ED email address (all capital letters) should be used as your User ID
- Contact TMS at 888-367-1622, for password assistance.





After signing into TMS, type "Transit Benefits Integrity Awareness Training" or "Integrity Awareness" in the Search Catalog box

Search Learning Plan	Show: Registrations	Q Search Catalog Go
There are no records found.		Prowse
	Search, "Integrity Awareness"	Easy Links Approvals Performance Appraisals External Requests (SF-1, Reports (Print REACH A News Start a Self Assessment Options and Settings
		Status Curricula
		Overdue (0) Due in 30 days (1) Due Later (0)
		1 item completed in the last 30 days.
		Competencies No assigned competencies
		Elements and Goals Complete (0%) In Progress (0%) Behind (100%)
		Career Path



Complete the Transit Benefit Integrity Awareness Training, Click "Transit Benefit Integrity Awareness Training"

Catalog Search Search: integrity awaren V Language: ED	ess English (ED_ENGLISH); Currency: USD (US Dollar)	Course Calendar
You searched for "integr	ity awareness"	
Narrow Courses:	Courses (1)	Sort By: Title 💌
▼ Category Instructor-Led Online Other Curricula	Transit Benefits Integrity Awareness Training (ONLINE ED_OM, Online Course Transit Benefits Integrity Awareness Training The Department's Transit Benefits Integrity Awareness more 0.00 USD	TRANSITBENEFITS)



After completing the Integrity Awareness Training Click on "Home" tab Click on "Completed Work"

S /TRAC	ig union upanini euguar
Home	
	SIDNEY MURRISH PROGRAM SPECIALIST / PROGRAM SPECIALIST TRAINSPORTATION SERVICES DIVISION
	Learning Plan
	Search Learning Plan Show: Registrations V V Go Go
	There are no records found.
	Approvais Performance Appraisais External Requests (SF-1 Reports (Prim REACH A News Start a Self Assessment Options and Settings
	Status
	Curricula Diverdue (0) Due in 30 days (1) Due Later (0)
	Completed Work 1 item completed in the last 30 days.
	Competencies No assigned competencies
	Elements and Goals Complete (%) In Progress (0%) Behind (100%)
	Career Path Target A Future Job



		Show Com	nletions: After	7/10/2014
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Learning	Transit Benef			7/15/2014 07:21 AM
		Contact Hours: 1.00	👰 View Details	
		Sempreudit Buter in Section El Tra	A Print Certificate	
			R Deview Content	
			Keview Content	
1 literes		atch IIÅ *	s are for America/Denvertime :	1000
1 110113		All date	a ale for Americard/envertimer	20115.

Hover cursor on "Transit Benefit Integrity Awareness Training"

Click "Print Certificate"

Print the completed certificate and provide a copy to your Executive Officer. Please refer to <u>Executive Officer List (aka Approving Official).</u>



2.2 REGISTER IN TRANSERVE WEBSITE

Return to the TRANServe Website

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

Click "Participants"





Click "Education"

Click "Transit Benefit Program Application System"

dot.gov/participants.html	
L CPSC	ISB-2015-13R Daily Parking Pre Payments - Revised
DHS-ICE	<u>TSB-2015-12R Bicycle Benefit Claim 2015 -</u> Revised
DHS-CIS	TSB-2015-11R CyberSecurity Upgrade –
DISA-REG (Fort Meade)	<u>TSB-2015-11 CyberSecurity Upgrade</u>
DOC-ESA	<u>TSB-2015-10 Federal Protective Services</u> Garage Patrol
DOC-NOAA	 <u>TSB-2015-09 Special Event Dates for</u> <u>FY2015</u>
DOC-OIG	<u>TSB-2015-08 Announcing DOT 2015 Transit</u> Benefit Recertification
DOC-OS	1. DOT Recertification Guide
DOI-USGS	2. DOT Q & A Sessions Schedule
DOJ-OIG	ISB-2015-0/ Increased Garage Traffic ISB-2015-06 DOT HQ Parking and Transit
DOT	Benefit (PTB) System Conversion
Education	Benefit System Maintenance Shutdown
 Department of Education Transit Benefit Program Transit Benefit Integrity Augustance Desuitament (TMC) 	<u>TSB-2015-04 Bicycle Benefit Claims</u>
Transit Benefit Program Application System	<u>TSB-2015-03 DOT HQ Parking Policy Rev.</u> and New Vehicle Barriers Operational
<u>Transit Benefit Applicant's Guide</u>	TSB 2015 02 Ophy Transit Burghaso
How to Register your SmarTrip Card	TheBus Monthly Bus Passes with
 Email: <u>OMMSTransportationServices@ed.gov</u> 	TRANServe's Debit Card
Phone: 202-401-2905	<u>TSB-2015-01 Closure M Open House</u>
ED Transportation Services Survey	• <u>TSB-2014-10 ORCA ALERT</u>
ED Transit Benefit Program Intranet Policies and Procedures	<u>TSB-2014-09 Bicycle Benefit Claims</u>
EEOC	<u>TSB-2014-08 Password Compliance</u>
	<u>TSB 2014-07 DOT Annual Transit Benefit</u>



Click the "Register" button REMEMBER- You ONLY NEED TO REGISTER ONCE.

* indicates required field.		
Login		
*User Name:	john.doe@ed.gov	
*Password:	Enter password	
	Please enter your Password	
	Log In Forgot Password	!?
	Not registered yet? Register	
	WARNINGWARNING***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:	
	 You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system. 	
	WARNINGWARNING****WARNING**	

Complete the registration form

Use your ED email address as your User Name and your desk phone number

*User Name:	john.doe@ed.gov
*First Name:	John
Middle Name:	Middle Name
*Last Name:	Doe
*Agency/Mode:	ED
Phone Number:	111-222-3333

Click "Register"



TRANServe System will generate a password and send it to your ED email address. Then, the system will return to the Log in screen

*User Name:	john.doe@ed.gov
*First Name:	John
Middle Name:	Middle Name
*Last Name:	Doe
*Agency/Mode:	ED
Phone Number:	111-222-3333

From the Log in screen, enter your User Name (ED email address) and Password. Click "Log In."

Login		
*User Name:	john.doe@ed.gov	
*Password:		
	Log In Forgot Password?	
	Not registered yet? Register	
	WARNINGWARNING****WIRNING**	
	You are accessing a U.S. Government information system, which includes this computer, the computer network on which it is connected, all other computer 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:	
	 You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system. 	
	WARNINGWARNING****WARNING**	



2.3 CHANGE PASSWORD

Once logged in, select "Change Password"

Home	Transit Application	Approval Section 12 -	Utilities - Admin -
		Pa	arking and Transit Benefit Public Website Version v 3.0
			_
			Transit Benefit Application
			Approval Section
			🌣 My Account
			✓ Change Password
			Agency Reports

Complete the Change Password form Click "Submit"

*Current Password:	Current password	Show Hint
*Create New Password:	New password	
*Confirm New Password:	Confirm New password	
*Create a Hint:	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, I, \$, %) 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	Submit Cancel



"Your Password has been successfully change." will be displayed. Enter User Name and Password and click "Log In."

	Your Password Use your Username a	has been successfully changed. nd New Password to login to the system.	
indicates required field.			
Login			
*User Name:	Government Email Address		
*Password:	Enter password		
	Log in		Forgot Password?
	Not reg	istered yet? Register	

2.4 COMPLETE AND SUBMIT ONLINE APPLICATION

Select "Transit Benefit Application"







YOU MUST AGREE TO THE TERMS AND CONDITIONS OF THE TRANSIT BENEFIT PROGRAM TO PROCEED WITH THE APPLICATION.

	WARNING !
T p a	his 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 unishable 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 nd 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 at this or 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.
	I Agree I Do Not Agree

Read the terms and conditions of the Transit Benefit Program Click "I Agree" to proceed with the application process.



1) Specify Reason for

THE TRANSIT BENEFIT APPLICATION **WORKSHEET**

Select "Civil/Military" from drop-down menu. Select your work status from drop-down menu. Select your transportation nethod(s) and enter: (a) Name of Company for nethod of transportation (b) daily or monthly
from drop-down menu. Select your work status from drop-down menu. Select your transportation nethod(s) and enter: (a) Name of Company for nethod of transportation (b) daily or monthly
Select your work status from drop-down menu. Select your transportation nethod(s) and enter: (a) Name of Company for nethod of transportation (b) daily or monthly
Select your transportation method(s) and enter: (a) Name of Company for nethod of transportation (b) daily or monthly
(b) daily or monthly
days you routinely work in
steps for every transportation method (i.e.,
Monthly Expense value
utomatically calculates.
\$ 95.50
-
Monthly Expense

Transit Benefit Application Guide



5 "Identifier: 0			
	_		_
Name:	(Last)	(First)	(Middle)
Email Address:		"Work Phone: 😡	202-260-8354
6 Common Identifier: 9	EDUCATION		
Department of Education			
7 "Select Your Agency: 9	ED ¥	9 "Region: 9	DC
8 *Admin: 0	OM	~	
	Populates from Select Your Agency		
	I certify that my usual monthly Transit co This field is automatically calculated	ommuting costs are: 9	\$ 191.00
10 "Work Address:	400 MARYLAND AVENUE		
10			
"Work City:	DISTRICT OF COLUMBL	"Work State: DC 🗸	"Work Zip: 20202
Residence Information			
"Address:			
	Address 2		
"City:		"State:	"Zip:
		and a second sec	
Approver Information			
12 *Approving Official: 9	WANDA DAVIS Select	13 "Manager/Fund Certifier: 0	COORDINATOR ED TRANS Select
	Click the Select button to select Approving Official		Click the Select button to select Manager/Fund Certifier
Point of Contact	DENEEN DADI EV. DOSE Select	Mananar Phona	
TOTAL OF CONDUCT. O	Click the Select button to select Point of Contact	manager i nonv.	
14 *\$martTrip Card Number: 9	NA		
Comment for Agency Approvers: 9			

- 5) Enter the last 4 digits of your Social Security number in the "Identifier" box.
- 6) Enter the word"Education" in the"Common Identifier"field.
- 7) Select your Agency/Mode
- 8) Select your Principle Office
- 9) Select your Region
- 10) Enter work information
- 11) Enter Residence information
- 12) Select Approving Official EXCUTIVE OFFICERS LIST (APPROVING OFFICIAL LIST)(see pg. 25)
- 13) Enter Manager/Fund Certifier as "ED TRANSIT BENEFIT COORDINATOR"
- 14) Enter SmarTrip® card number to participate in Smart Benefits. Enter "NA" to participate in TRANServe Debit card benefits. Please see reference next page for more information.

TRANServe Debit card: \$100

Smartrip: \$25



NOTE: Use chart below to identify your Smartrip Card type and enter circled number portion into 14) "Smartrip Card Number" field.



SMARTrip Card Type

Please indicate the type of your card by matching the serial number on the back of your card with the pattern that is circled on the images below.

Card Type #1:	ase return to: WMATA, 600 Fifth Street, N.W. D.C. 20001 arTrig' and SmartBerefits' logos di tradatservice marks of WHATA. 012345678 C3DW803 serial number
Card Type #2:	serial number check sum
Card Type #3:	e return to: WMATA, 600 Pitch Street, N.W. (C. 2000) Trig [*] and SmartBenefits [*] logos trade/service marks of WMATA. C3DW017 0020 0001 5644 364 6 Serial number
Card Type #4:	return to: WMATA, 600 Fifth Street, N.W. 20001 g ^e and SmartBenefits [®] logos kde/service marks of WMATA. GD1137 Serial number



TRANServe Debit Card



Here's how the TRANServe Debit Card works

- 1. All cards are delivered to the Transportation Services Branch, upon receipt of the card you will be notified via email.
- 2. Receive TRANServe Debit Card.
- 3. Activate your card by calling Chase Customer Service at 1-866-891-6951. You will need the following information:
 - Work phone number OR use (202-401-2905)
 - Work ZIP code use (20202)
 - Your agency-assigned Common Identifier use (EDUCATION)

Your transit benefit funds will be electronically deposited to your TRANServe Debit Card on the 10th day of each month.

4. Select the "Credit" option when purchasing transit fare media.

Any transit benefit funds you do not use by the end of the 9th day of the following month will be credited back to Education.



Debit Card User Account Website

JPMorgan has updated its <u>website</u> to better serve Transit Benefit Program Participants.

"My Account" is now "UCard Center".

UCard Center gives you much more control over your TRANServe Debit Card account.

Now you can:

- ACTIVATE your TRANServe card
- REQUEST a replacement card
- DOWNLOAD program training materials
- VIEW your pending transactions

Check it out to learn more!

- VISIT <u>https://ucard.chase.com/locale.action?request_locale=en</u> to go to the new UCard Center
- REGISTER for UCard Center by creating a new User ID and password
- SAVE to your Favorites.
 - DELETE the old "My Account"
 - SAVE the new "UCard Center" to your favorites

This step-by-step guide will assist you in the transition <u>JPMorgan</u> <u>UCard Center Registration Steps</u>

It's easy, safe, and convenient!



3 APPLICATION APPROVAL PROCESS (FLOWCHART)

- SMARTRIP Card: Processing Timeframes 10 business days, funds will auto-load onto card electronically (if applications are received and approved by DOT).
- TRANServe Debit Card: Processing Timeframes Debit Cards up to 15-30 business days to receive the card in hand.





4 EXCUTIVE OFFICERS LIST (APPROVING OFFICIAL LIST)

EXECUTIVE OFFICER LISTING							
Name	Assistant	PO	Building	Room	Phone		
Linda Stracke, Dir, Exec Mgmt Staff	Mitchell Dedert Administrative Officer	OS	LBJ	7E103	(202) 401- 3085		
LaVerne Chester, Administrative Officer		ODS/OUS	LBJ	7E203	(202) 401- 5937		
Brenda Long, Administrative Officer		OPEPD	LBJ	7E201	(202) 205- 3697		
Laurie Meier, Administrative Officer		OCO	LBJ	7C157	(202) 401- 0422		
Paula Shipp, Administrative Officer		OGC/OLCA	LBJ	6W336	(202) 205- 5203		
Diedre L. Windsor	Monique Lewis	OCR	LBJ	4E305	(202) 453- 5512		
Teresa Clark		OIG	РСР	8159	(202) 245- 6340		
Gale Hoes		OIG	РСР	8109	(202) 245- 7002		
Andrew Pepin (A)	Susan Wilbur/Darlene Thornton/(Melanie Winston for Monthly Reports)	OSERS	РСР	5106	(202) 245- 7632		
Michael Holloway	Holly Williams (Monthly Reports only)	OCFO/OCIO	РСР	6090	(202) 245- 8150		
Wanda Davis	Jeanie Banks	ОМ	LBJ	2W227	(202) 401- 5931		
Tameka Richardson	Yvonne Watkins	FSA	UCP	21C4	(202) 377- 3901		
Daniel Miller	Kristina Letourneau/Yvonne Navalaney/Kristin Harris/Lauren Williams	OPE/OCTAE	РСР	11129	(202) 245- 7777		
Tina Hunter	Alda Giusti	OESE/OELA	LBJ	3E310	(202) 260- 2526		
Leontyne (Tina) Minor	Angela Miles	IES/NCES	СР	602H	(202)219- 1466		
Liza Araujo	Tawanna Coles	OII	LBJ	4W333	(202) 260- 4008		
Tracy Jones		ACSFA	СР	413	(202) 219- 2099		

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Munira Mwalimu	Mary Crovo	NAGB	NC	825	(202) 357-
	-				6906