OM

Security, Facilities and
Logistics Services Division
Transportation Services
Branch

TRANSIT BENEFIT APPLICATION GUIDE

Contents

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:
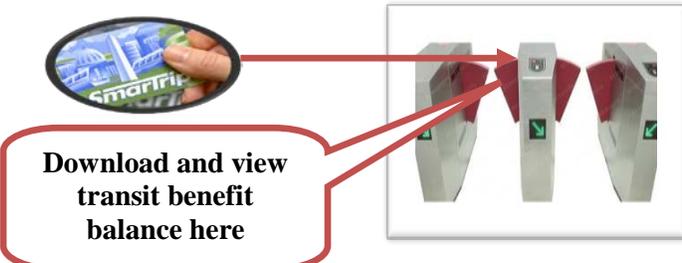
1) Completion of the Integrity Awareness Training via the Talent Management System (TMS),
2) Register via TRANServe website, and
3) Complete and submit application via online TRANServe website.

1.2 BACKGROUND

The Department of Education offers a monthly allotment of up to one hundred and twenty-five ($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	
• 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 "Register Smartrip" 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 AWARENESS 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)"

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

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

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

Hover cursor on "Transit Benefit Integrity Awareness Training"
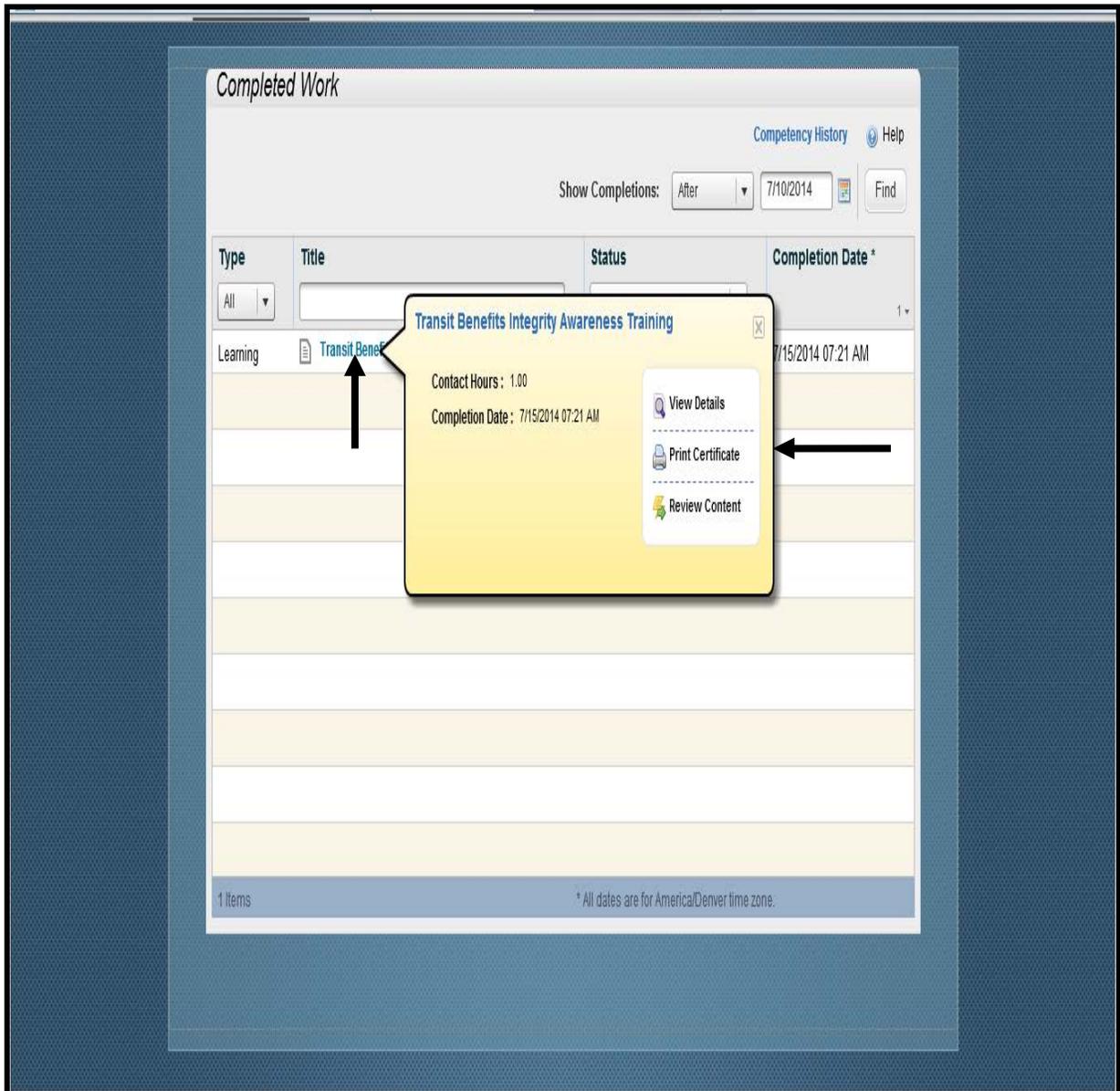
Click "Print Certificate"
Print the completed certificate and provide a copy to your Executive Officer. Please refer to Executive Officer List (aka Approving Official).

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"

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

Complete the registration form

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

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

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

2.3 CHANGE PASSWORD

Once logged in, select "Change
Password"
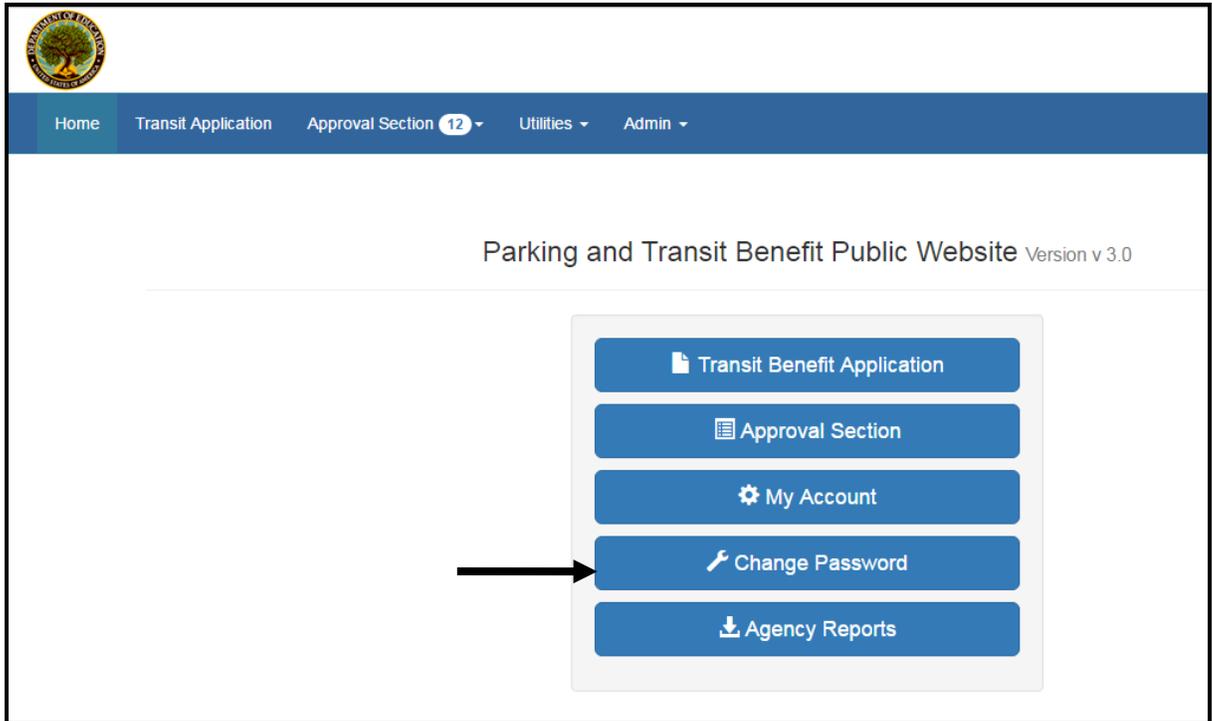
Complete the Change Password form
Click "Submit"

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

2.4 COMPLETE AND SUBMIT ONLINE APPLICATION

Select "Transit Benefit Application"

Click on "Certify/Enroll" to enroll as new user
Click "Continue"

Select an Action to Continue

Employer: Department of Education

○ Request Information ❓

○ Withdraw from the Program ❓

○ Address/Smartrip Change ❓

◉ Certify/Enroll ❓

Continue

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

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 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.

THE TRANSIT BENEFIT APPLICATION WORKSHEET

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 Tr

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"**

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

1 *Reason for Certification:

2 Civilian/Military: ❷   CIVILIAN

3 Work Status: Full Time

4 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 M
- If you work a Flex Schedule of 9-hours per day, the average amount of 18 Days can be entered into the Days per Mc
- If you work a Compressed schedule of 10-hour days, the average amount of 16 Days can be entered into the Days p
- If you telecommute or work part time, enter the number of days you actually commute to/from work.

*Select your transportation methods:

Bus	Other Bus	Rail	Other Method	Vanpool

Rail to Work:	VRE	$ 7.96	12	$ 95.50
4(a)	Name of Company	4(b) Daily Expense	4(c) Days per Month	Monthly Expense

Rail from Work:	VRE	$ 7.96	12	$ 95.50
	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.   4(d)   **Total Monthly Expense:** $ 191.00

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1) Specify Reason for Certification (i.e., Annual Certification, New Transit Benefit Participant).

2) Select "Civil/Military" from drop-down menu.

3) Select your work status from drop-down menu.

4) Select your transportation method(s) and enter: (a) Name of Company for method of transportation (b) daily or monthly expense, (c) number of days you routinely work in a month. Complete these steps for every transportation method (i.e., bus and rail) (d) the Total Monthly Expense value automatically calculates.

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Transit Benefit Program Application

5 *Identifier: ❓ `****`

Name: ▮▮▮▮ (Last)   ▮▮▮▮ (First)   ▮▮▮▮ (Middle)

Email Address: ▮▮▮▮   *Work Phone: ❓ `202-260-8354`

6 *Common Identifier: ❓ `EDUCATION`

Department of Education

7 *Select Your Agency: ❓ `ED`   **9** *Region: ❓ `DC`

8 *Admin: ❓ `OM`
Populates from Select Your Agency

I certify that my usual **monthly Transit commuting costs** are: ❓   `$ 191.00`
This field is automatically calculated

10 *Work Address: `400 MARYLAND AVENUE`

*Work City: `DISTRICT OF COLUMBI`   *Work State: `DC`   *Work Zip: `20202`

Residence Information

11 *Address: ▮▮▮▮

Address 2

*City: ▮▮▮▮   *State: ▮▮▮▮   *Zip: ▮▮▮▮

Approver Information

12 *Approving Official: ❓ `WANDA DAVIS` [Select...]
Click the Select button to select Approving Official

13 *Manager/Fund Certifier: ❓ `COORDINATOR ED TRANS` [Select...]
Click the Select button to select Manager/Fund Certifier

*Point of Contact: ❓ `DENEEN RAPLEY-ROSE` [Select...]
Click the Select button to select Point of Contact

Manager Phone:

14 *SmartTrip Card Number: ❓ `NA`

Comment for Agency Approvers: ❓
15
You have **1995** characters remaining

[Continue...] [Cancel]

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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.

15) For split benefits - indicate amount. For example; enter "I would like my benefits split in the following:
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

arTrip' and SmartBenefits' logos
d trade/service marks of WMATA. (012345678) C3DW803

serial number

Card Type #2:

ase return to: WMATA, 600 Fifth Street, N.W.
, D.C. 20001

arTrip' and SmartBenefits' logos
d trade/service marks of WMATA. (012345678 (3) C3DW803

serial number   check sum

Card Type #3:

e return to: WMATA, 600 Fifth Street, N.W.
.C. 20001

Trip' 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

ip' and SmartBenefits' logos
de/service marks of WMATA. GD1137 (0167 0693 4564 7992 9601)

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 website 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 https://ucard.chase.com/locale.action?request_locale=en 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 JPMorgan UCard Center Registration Steps

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.
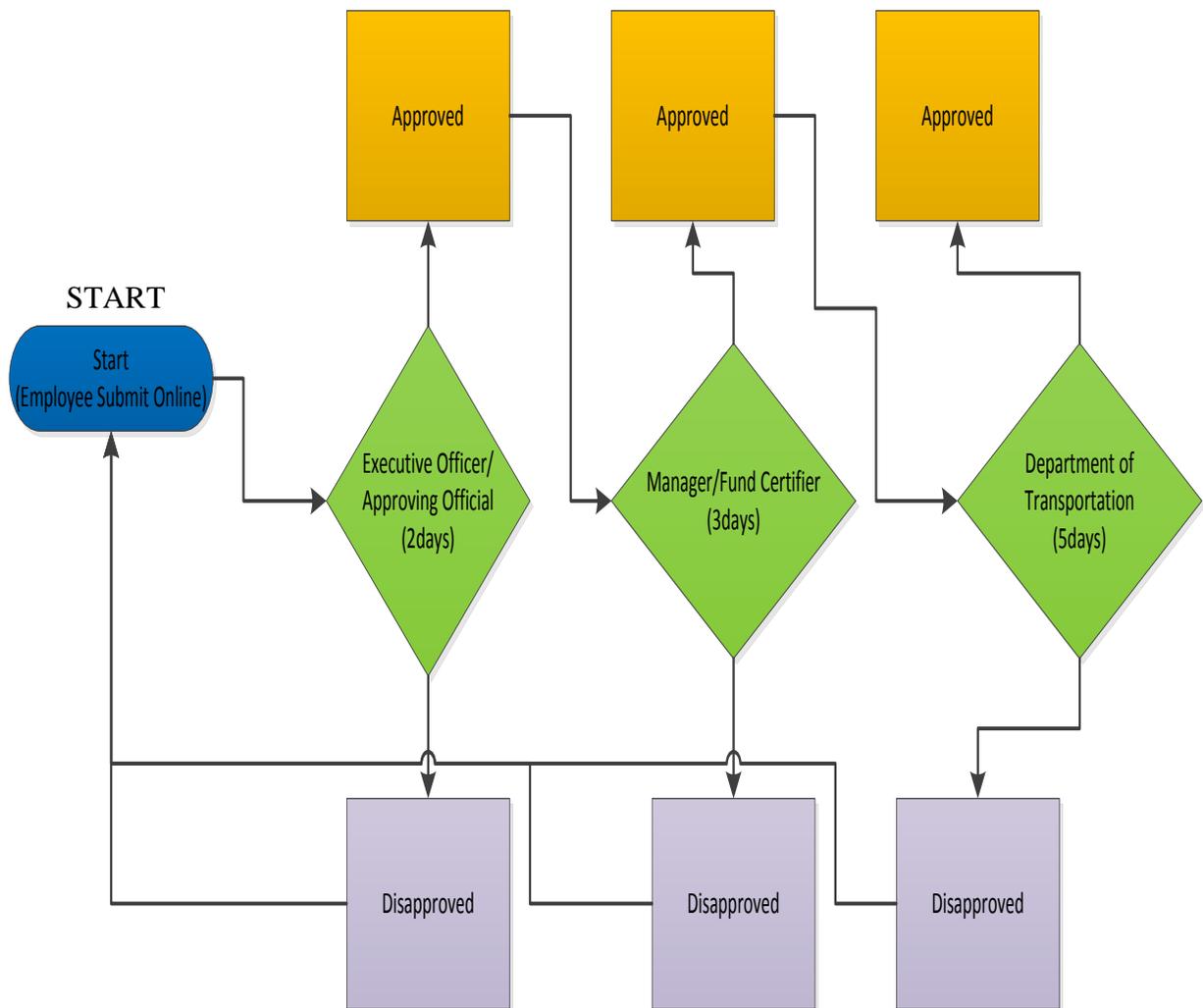
4   EXCUTIVE OFFICERS LIST (APPROVING OFFICIAL LIST)

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	PCP	8159	(202) 245-6340
Gale Hoes		OIG	PCP	8109	(202) 245-7002
Andrew Pepin (A)	Susan Wilbur/Darlene Thornton/(Melanie Winston for Monthly Reports)	OSERS	PCP	5106	(202) 245-7632
Michael Holloway	Holly Williams (Monthly Reports only)	OCFO/OCIO	PCP	6090	(202) 245-8150
Wanda Davis	Jeanie Banks	OM	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	PCP	11129	(202) 245-7777
Tina Hunter	Alda Giusti	OESE/OELA	LBJ	3E310	(202) 260-2526
Leontyne (Tina) Minor	Angela Miles	IES/NCES	CP	602H	(202)219-1466
Liza Araujo	Tawanna Coles	OII	LBJ	4W333	(202) 260-4008
Tracy Jones		ACSFA	CP	413	(202) 219-2099

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