



Environmental Protection Agency

TRANSIT BENEFIT PROGRAM Approving Official Guide

Last Updated May 5, 2015

Please do not print this Guide

Presented By:



Visit the TRANServe website at: <http://transerve.dot.gov>

Start at the [TRANServe.dot.gov](http://transerve.dot.gov)

- Choose **Participants** :



- Click: EPA Transit Benefit Application System
 - ◆ Your official government email address is your User Name
 - Any other Username will not permit access to the system
 - ◆ **FIRST TIME ONLY** – Click “Register” to create an account”
 - A temporary password will be emailed to you

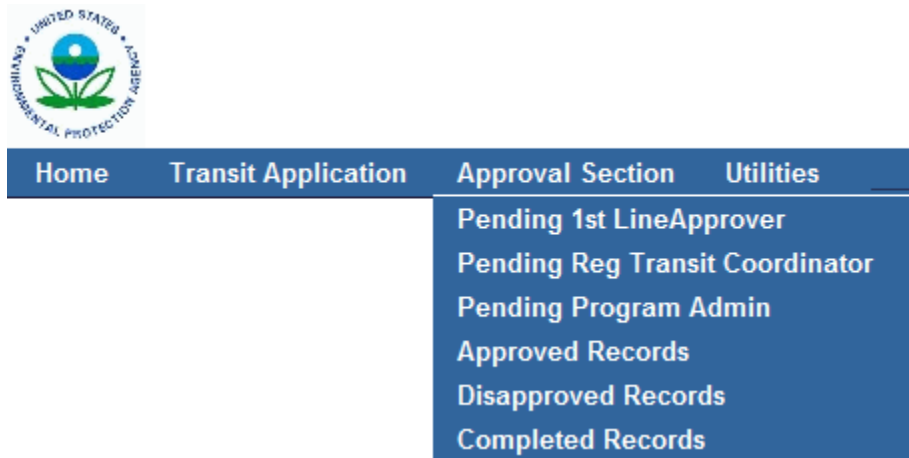
A screenshot of the EPA Transit Benefit Application System login and registration page. The page has a light blue header with the text 'LOG IN'. Below the header, there are two input fields: '*User Name:' and '*Password:'. To the right of the password field is a blue link that says 'Forgot Password?'. Below the input fields is a grey button labeled 'Log In'. At the bottom of the page, there is a blue link that says 'NOT REGISTERED YET?' and a red-bordered button labeled 'Register'.

Application Types:

- 1) CERTIFY/ENROLL
 - a. Recertification of existing participants
 - b. Enrollment of new participants
 - c. Change in transit cost
- 2) WITHDRAWAL
 - a. Withdraw from the program

Visit the TRANServe website at: <http://transerve.dot.gov>

1. Select "Approval Section"



2. Select the correct queue:

- a. [1st Approver](#) – First Line Approver
- b. [2nd Approver](#) – Regional Transit Coordinator

3. Click the name to review:

The screenshot shows the TRANServe website interface. The top navigation bar includes Home, Transit Application, Approval Section, Utilities, Admin, and Logout. The user is logged in as Cheri Johnson. The main content area displays 'PENDING TRANSIT APPLICATION' and 'STATUS: 1ST LINEAPPROVER'. Below this is a table with the following data:

Mode	Admin	Request Date	Type	Name
EPA - R3	TEST CARDS	05/05/2015	New Transit Benefit Participant	CHERI JOHNSON

Hint: Use Ctrl +F to locate a specific name in a long list

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The application and expense worksheet are displayed for Review:

Reason for Disapproval:

[\[History\]](#)

CERTIFICATION PENDING (1ST LINEAPPROVER)

TRANSIT BENEFITS WORKSHEET				
<p>Reason for Certification: New Transit Benefit Participant</p> <p>Note: The user acknowledges that they have completed the required Annual Transit Benefit Application training.</p> <p>Employment Type: VOLUNTEER Work Status: Full Time</p>				
Method of Transportation		Daily Expense	Days per Month	Total Monthly Expense
Bus to Work	Name of Company SEPTA	\$ 2.43	8	\$ 19.44
Bus from Work	Name of Company SEPTA	\$ 2.76	8	\$ 22.08
Other Bus to Work	Name of Company	\$		\$
Other Bus from Work	Name of Company	\$		\$
Rail to Work	Name of Company PATCO	\$ 2.6	8	\$ 20.8
Rail from Work	Name of Company PATCO	\$ 2.6	8	\$ 20.8
Other Method to Work:	Name of Company	\$		\$
Other Method from Work:	Name of Company	\$		\$
Van Pool	Name of Company	\$		\$
Parking	Name of Company	\$		\$
				Subtotal: \$ 83.11
<p>Employees are responsible for adjusting their monthly transit benefits each month in accordance with their actual work commute each month.</p>				<p>Total Monthly Costs \$ 83.11</p>

TRANSIT BENEFITS APPLICATION			
STATUS: [RECERTIFY]			
Smart Benefits Program: NO			
Last 4: ****			
Name:	JOHNSON <small>(Last)</small>	CHERI <small>(First)</small>	 <small>(Middle Name)</small>
Email Address:	Cheri.Johnson@dot.gov	Work Phone:	202-366-0064
Common Identifier:	GREEN EPA	Work Zip Code:	19103
Mode:	EPA - R3	Region:	PHILADELPHIA ▼
Admin:	▼		
Division/Office:	APD	Select...	
Mail Code:		Select...	
Duty Station:	1650	Select...	
I certify that my usual monthly transit commuting costs are: \$83.11			
<hr/>			
WORK INFORMATION			
Work Address: Enter Duty Station Address			
Work City:	Philadelphia	Work State:	PA
		Work Zip:	19019
RESIDENCE INFORMATION			
Address: 1234 Haven Avenue			
Address 2: Apt. 7			
City:	Philadelphia	State:	PA
		Zip:	19093
<hr/>			
1st Line Approver: SHARON LAPERSONERIE			
Point of Contact: SHARON LAPERSONERIE			
Reg Transit Coordinator: SUSAN JANOWIAK		Phone: 215-215-2151	
SmartTrip Card Number: NA			
Comment for Agency Approvers:			
Use This Space to Note Additional Comments or Concerns that will assist in the Approval Process			

The Application must:

- i. Specify name of Transportation Provider
- ii. Indicate Daily, Subtotal and Total Monthly Expense

b. The Approver must:

1. Verify the employee works for you
2. Follow all Application Review Procedures.
3. Check SmarTrip® user entered as "NA"

- c. Click "[\[History\]](#)" to review past actions on *this* application.
 - i. Approve or Disapprove the Application
 - 1. Scroll to the top
 - a. Click "Approve" or "Disapprove"



The screenshot shows a rectangular interface with a white background and a thin black border. At the top, there are three buttons: 'Approve', 'Disapprove', and 'Cancel', each in a light gray box with black text. Below these buttons is a text label 'Reason for Disapproval:' followed by a long, empty white text input field. In the bottom right corner of the interface, there is a blue underlined link labeled '[History]'.

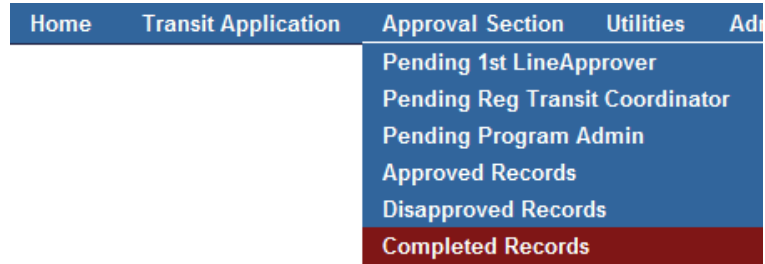
- ii. If disapproved, enter clear Instructions to Participant in "Reason for Disapproval"

This completes the Approval Process.

Appendix A

Review Past Applications

4. To View Past Applications:
 - a. Select “Completed Records”



- b. Enter Participant’s Name
 - c. Click “Search”
 - i. Click Participant’s Name to choose a record
 1. Review past application (if applicable)
 2. Click “Back” to look at another past application
 3. Use this Navigation Bar to take another action

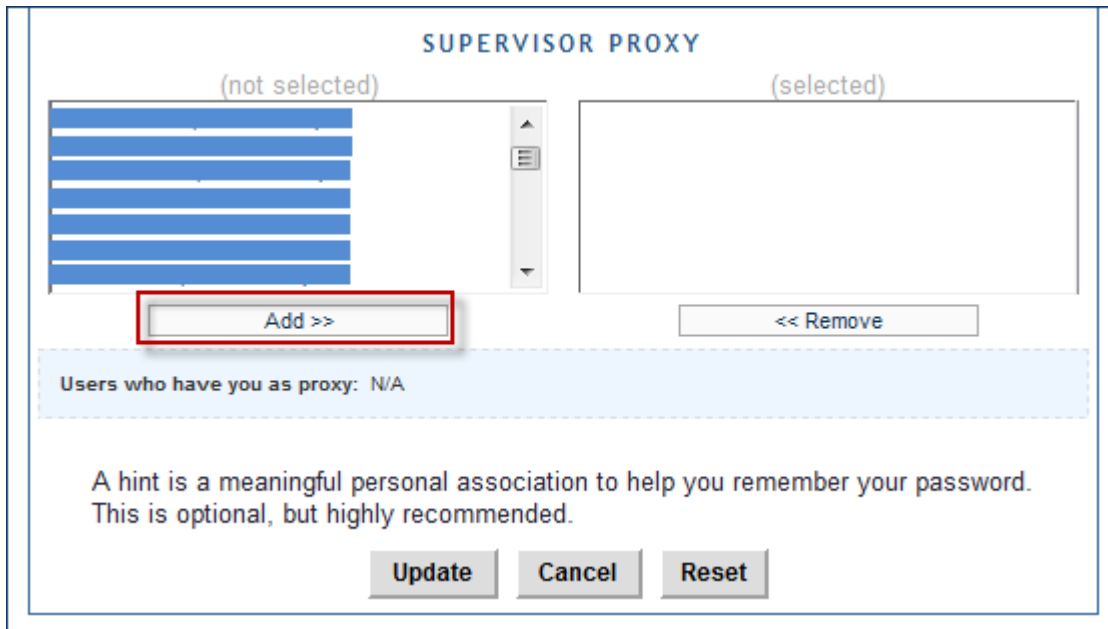


Appendix B

Using the Proxy Feature

Add a Proxy

1. From the Home screen, click “My Account”
2. Click on your role
 - a. “1st Line Approver” or “Regional Transit Coordinator”

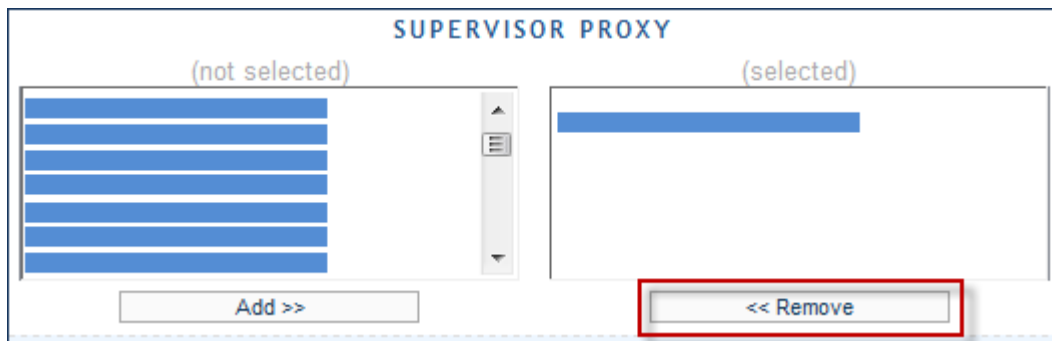


The screenshot shows the 'SUPERVISOR PROXY' interface. It features two columns: '(not selected)' on the left and '(selected)' on the right. The '(not selected)' column contains a list of five blue horizontal bars. Below this list is an 'Add >>' button, which is highlighted with a red rectangular box.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

3. Select your designated Proxy from (not selected) list on the left
4. Click “Add” to move name to (selected) box.
5. Click “Update”

Reverse a Proxy:

1. Click “Remove” to return name to the (not selected) box.



The screenshot shows the 'SUPERVISOR PROXY' interface. The '(not selected)' column on the left now contains six blue horizontal bars. The '(selected)' column on the right now contains one blue horizontal bar. Below the '(selected)' column is a '<< Remove' button, which is highlighted with a red rectangular box. The 'Add >>' button is still present below the '(not selected)' column. The rest of the interface, including the 'Update', 'Cancel', and 'Reset' buttons and the hint message, remains the same as in the previous screenshot.

2. Click “Update”

Appendix C

Sample: Six Month Report (January through June FY10) – names removed (xxx,xxx)

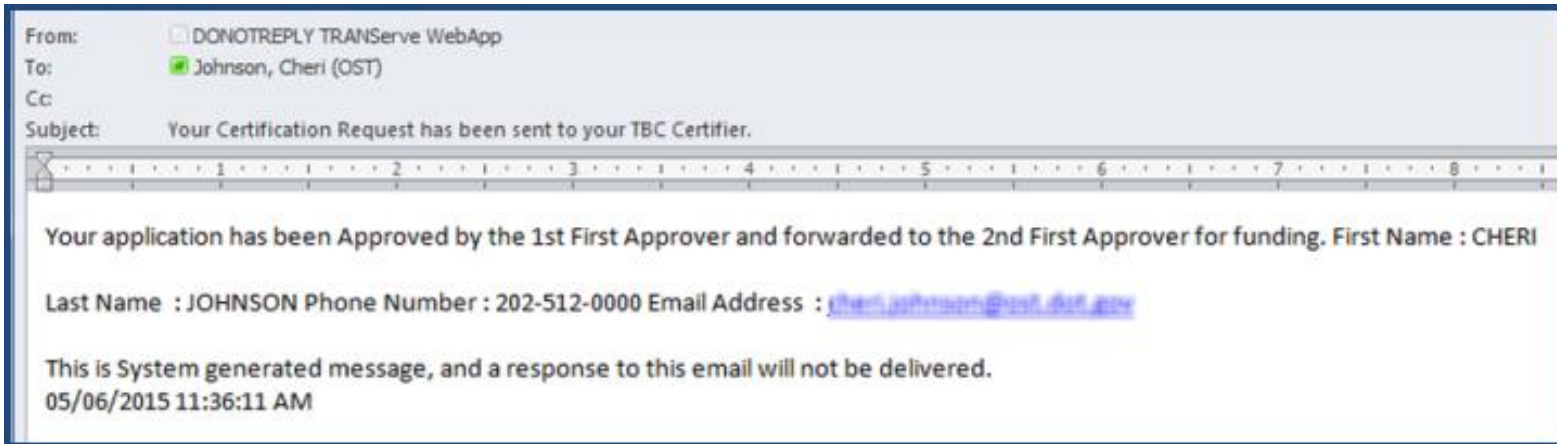
AGENCY	NAME	MONTHLY COST	JAN10	FEB10	MAR10	APR10	MAY10	JUN10	TOTAL
DOT-OST-WCF M-70 - 0402001000	XXXXX, XXXX	\$230.00	\$230.00	\$230.00	\$230.00	\$230.00	\$230.00	\$230.00	\$1,380.00
DOT-OST-WCF M-70 - 0402001000	XXXXX, XXXX	\$128.00	\$100.25	\$85.80	\$66.45	\$94.50	\$101.45	\$104.25	\$552.70
DOT-OST-WCF M-70 - 0402001000	XXXXX, XXXX	\$46.00		\$184.00				\$70.00	\$254.00
DOT-OST-WCF M-70 - 0402001000	XXXXX, XXXX	\$138.00					\$143.00		\$143.00
DOT-OST-WCF M-70 - 0402001000	XXXXX, XXXX	\$230.00			\$460.00				\$460.00
DOT-OST-WCF M-70 - 0402001000	XXXXX, XXXX	\$94.00	\$75.00	\$67.10	\$71.85	\$94.00	\$84.95	\$94.00	\$486.90
DOT-OST-WCF M-73 - 1103002000	XXXXX, XXXX	\$104.00	\$60.75	\$47.45	\$80.00	\$70.70	\$41.50	\$84.20	\$384.60
DOT-OST-WCF M-73 - 1103005000	XXXXX, XXXX	\$151.00	\$97.00		\$100.00	\$75.00	\$89.00	\$130.00	\$491.00
DOT-OST-WCF M-73 - 1103006000	XXXXX, XXXX	\$120.00	\$75.00		\$100.00				\$175.00
DOT-OST-WCF M-73 - 1103006000	XXXXX, XXXX	\$104.00	\$104.00			\$104.00		\$104.00	\$312.00
DOT-OST-WCF M-73 - 1103006000	XXXXX, XXXX	\$136.00			\$136.00				\$136.00
DOT-OST-WCF M-73 - 1103006000	XXXXX, XXXX	\$126.00	\$126.00	\$126.00	\$126.00	\$126.00	\$126.00	\$126.00	\$756.00
DOT-OST-WCF M-73 - 1103006000	XXXXX, XXXX	\$161.00	\$129.00	\$70.00	\$134.00	\$139.00	\$65.00	\$81.00	\$618.00
DOT-OST-WCF M-73 - 1103006000	XXXXX, XXXX	\$108.00	\$104.00	\$104.00	\$104.00	\$108.00	\$108.00	\$108.00	\$636.00
DOT-OST-WCF M-73 - 1103006000	XXXXX, XXXX	\$158.00	\$136.00	\$91.00	\$131.00	\$125.00	\$126.00	\$131.00	\$740.00
DOT-OST-WCF M-73 - 1103006000	XXXXX, XXXX	\$142.00	\$68.00	\$68.00	\$118.00	\$140.00	\$140.00	\$140.00	\$674.00
DOT-OST-WCF M-73 - 1103006000	XXXXX, XXXX	\$136.00	\$136.00	\$136.00	\$136.00	\$136.00	\$136.00	\$136.00	\$816.00
DOT-OST-WCF M-73 - 1103006000	XXXXX, XXXX	\$176.00	\$176.00	\$176.00	\$176.00	\$176.00	\$176.00	\$176.00	\$1,056.00
DOT-OST-WCF M-73 - 1103006000	XXXXX, XXXX	\$83.00	\$83.00	\$83.00	\$62.00	\$83.00	\$52.80	\$83.00	\$446.80
DOT-OST-WCF M-73 - 1103006000	XXXXX, XXXX	\$142.00	\$122.00	\$122.00	\$95.00	\$122.00	\$122.00	\$122.00	\$705.00

Visit the TRANServe website at: <http://transerve.dot.gov>

Appendix D

Applicants are kept informed using email notifications

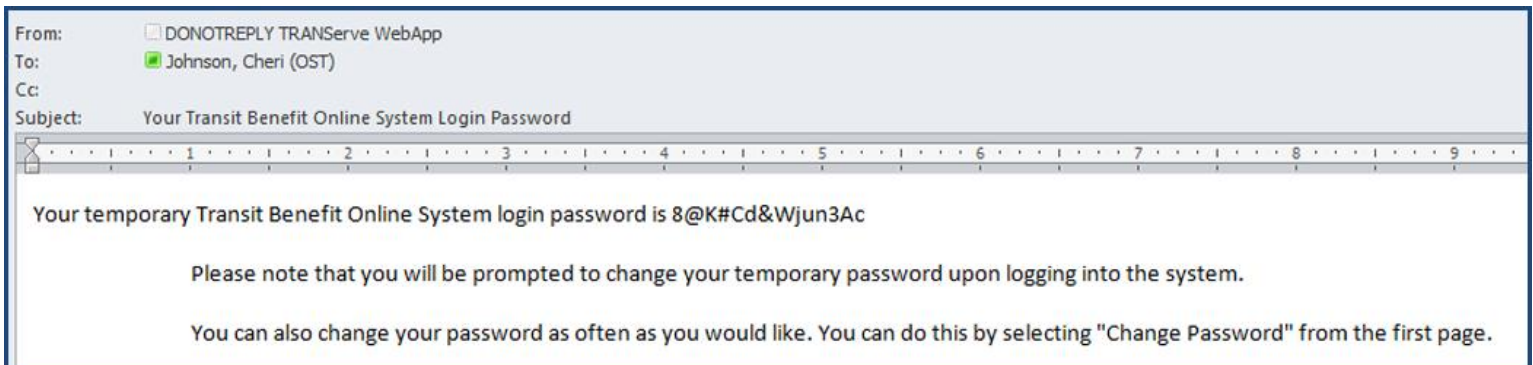
Sample:



Appendix E

Password Resets are Self-Serve using email

Sample:



Visit the TRANServe website at: <http://transerve.dot.gov>

Appendix F

Application Approvers are prompted using email notifications

Sample:

From: PTB Public Website Administrator [<mailto:DONOTREPLY.TRANServeWebApp@dot.gov>]
Sent: Tuesday, May 05, 2015 12:52 PM
To: LaHersonerie, Sharon
Subject: One Transit Benefit Program Certification Awaiting Approval

One Transit Benefit Program Certification Application is awaiting your approval. First Name : CHERI
Last Name : JOHNSON
Phone Number : 202-366-0064
Email Address : Cheri.Johnson@dot.gov
Mode : EPA - R3 Smart Benefits Program: N

Please enter the Online Application System (<https://transitapp.ost.dot.gov/index.cfm>) to view the request.

This is a System generated message and a response to this email will not be delivered.
05/05/2015 12:51:23 PM

Your Transit Benefit Office is here to assist Approvers

Please e-mail questions to:

R3_Transit_Subsidy@epa.gov

Or

And visit: <http://transerve.dot.gov/>

TRANServe.dot.gov is an excellent resource providing access to TRANServe's Electronic Transit Benefit Application, Program Materials, Best Practices, Policy, Regulations, Training, Guidance and Transit Links to assist in monitoring and administering your transit benefit program.

