

# TRANSIT BENEFIT PROGRAM APPLICATION SYSTEM <u>APPROVER</u> 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

1200 New Jersey Avenue, SE

Washington, DC 20590

#### Version 3.0

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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
Agency Program Office	Tomyko L. Levi	Regional Support Manager	Tomyko.L.Levi@hud.gov
Local Program Coordinator	Jennifer S. Trice- Russell	Support Services Specialist	Jennifer S. Trice- Russell@hud.gov

# 2. ACCESSING THE TRANSIT BENEFIT APPLICATION

### 2.1 Login Screen

Use the following steps to access the application:

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

5. Department of Transportation		U.S. Department of Transportation TRANSERVE Business in motion	
			• <b>D</b> Lo
* indicates required field.			
Login			
"User Name:	Government Email Address		
*Password:	Enter password		
	Log In Forgot Pass	word?	
	Not registered yet? Register		
	**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:	^	
	<ol> <li>You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system.</li> </ol>	~	
	**WARNING**WARNING***WARNING**		

Figure 1: Transit Benefit Application Log In page

First time users must register. Use the following steps:

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

Register Account Ir	formation
*User Name:	Government Email Address
*First Name:	First Name
Middle Name:	Middle Name
*Last Name:	Last Name
*Agency/Mode:	VA v
	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.* 

- c. Enter your official government email address in the User Name textbox.
- d. Complete the registration form.

mberly j.gravestest@va.gov	
inberly	
dle Name: J	
raves	
A 🔹	
ncy options will show once your Government Email Address has been validated	
5	

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.* 

- e. Click the **Register** button.
- f. 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:

- g. Enter your official government email address in the User Name textbox.
- h. Enter the temporary password in the Password textbox.

Login		
*User Name:	kimberly.j.gravestest@va.gov	
*Password:	••••••	
	Log In Forgot Pase	sword?
	Not registered yet? Register	
	**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:	î
	<ol> <li>You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system.</li> </ol>	~
	**WARNING**WARNING****WARNING**	

Figure 5: Log In page

- i. Click the Log In button.
- j. The Change Password page displays. Registered

# 2.2 Change Password

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

1. Enter the temporary password in the Current Password textbox.

Change Password Password Ex	pired	
*Current Password:	Current password	
*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

Figure 6: Change Password page

- a. Enter your new password in the Create New Password textbox.
- b. Minimum 12 characters
- c. Complexity: minimum of 1 uppercase, 1 lowercase, 1 number, 1 special character
- d. Reenter your new password in the Reenter New Password textbox.
- e. Enter a hint to remind you of your password in the Create a Hint textbox.
- f. Click the **Submit** button.

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

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



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.

Home	
Transit Application	
Approval Section -	
Utilities -	
My Account	
Change Password	

Figure 8: Utilities Menu Options

# 2.3 Password Recovery

Use the following steps to recover your password.

1. From the Login page; click the *Forgot Password?* Link. The Forgot Password page displays.

Forgot Password		
Show Hint		
*User Name:	Government Email Address	
	Show Hint	
Send It by Email		
*User Name:	Government Email Address A temporary password will be sent to your E-Mail Account.	
	Submit	
	Return to Login Pa	ag

Figure 9: Forgot Password page

- a. 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.

Forgot Password	
Login	
*User Name:	kimberly.j.gravestest@va.gov
*Password:	Enter password
	Hint: Sundayllow49
	Log In

Figure 10: Show Hint

b. 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.

### 2.4 My Account

My Account allows the user to update personal information.

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

*User Name:	kimberly.j.gravestest@va.go	v			
*First Name:	Kimberly	Middle Name:	J	*Last Name:	Graves
*Agency/Mode:	VA Agency options will show once Address has been validated	your Government Email			
Phone Number:	(202) 555-4632				

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.

a. 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.* 

Home	
Transit Application	
Approval Section -	
Utilities -	
My Account	
Change Password	

Figure 13: Utilities Menu Options

# 2.5 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.

# 2.6 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.

# 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: Local Coordinators and Office of Administration. 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: Local Coordinators and Office of Administration. 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.

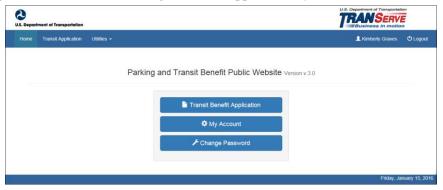


Figure 14: Website Home page

**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.

Home
Transit Application
Approval Section -
Utilities •
Admin 🗸
Angela Robinson
🖰 Logout

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<sup>®</sup> changes, and to certify/enroll in the transit benefit program.

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

Select an Action to Contir	ue	
	Employer: Department of Transportation	
	Request Information	
	○ Withdraw from the Program	
	○ Address/Smartrip Change 😔	
	○ Certify/Enroll	
	Continue	

Figure 16: Select An Action To Continue page

### 3.1.1 Request Information

The applicant can request information from the Agency Program Office by submitting questions regarding the transit benefit program or a submitted application through the Point of Contact (POC).

1. 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	Kimberly	Jessica
	(Last)	(First)	(Middle)
Email Address:	kimberly.j.gravestest@dot.gov		
Agency:	Department of Transportation		
*Point of Contact: 😌		Select	
	Click the Select button to select Point of C	ontact	
*Question:			
Quesuon.			
			Send Request Cancel
			Seno Request

Figure 17: Request Information page

- a. If a POC has been selected it will pre-populate in the Point of Contact textbox. To select a POC, click the **Select** button to display the available POCs in a separate window.
- b. Select a POC from the list.
- c. Enter the question or concern in the Question textbox and click the **Send Request** button.
- d. An email is sent to the selected POC. The Home page is displayed with a confirmation message at the top of the page.



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.

- 1. Select the Withdraw from the Program radio button.
  - a. Click the **Continue** button. The Withdraw From The Program page is displayed.

Withdraw from the Program					
ldentifier:	****				
Name:	MILLS	SHARONDA			
	(Last)	(First)			
Email Address:	Sharonda.Mills@va.gov				
Agency/Mode:	Department of V.A. (VA)				
*12345: 😯	(202) 555-4441				
"Withdrawal Date:					
	Click the Calendar to select a Withdrawal E	Date			
*Approving Official: 😌		Sel	ect		
	Click the Select button to select Approving	Official			
"Manager/Fund Certifier: 📀		Sel	ect		
	Click the Select button to select Manager/F	und Certifier			
Comment for Agency Approvers: 🕢					
	You have 1995 characters remaining				
	i ou naro rece onaración romannig			Withdraw	Cancel

Figure 19: Withdraw From The Program page

- b. Click the pop up calendar to select a withdrawal date.
- c. Click the **Select** button to display the list for your agency's 1<sup>st</sup> Approvers.

Approving Official			×
Name		Email	
Type to filter			
KIM LYONS		kim.lyonstest@va.gov	
	<< < 1 >	>>	
		C	lose

#### Figure 20: Approving Official (1<sup>st</sup> Approver)

- d. Select your Approving Official (1<sup>st</sup> Approvers).
- e. Click the **Select** button to display the list for your agency's 2<sup>nd</sup> Approvers.

Mana	ager/Fund Certifier								×
	Name					Email			
	Type to filter								
C	GLEN HARPERTEST					glen.h	arpertest@va.gov		
C	JESSICA MARTIN					jessica	a.martins@va.gov		
		<<	<	1	>	>>			
								Close	

Figure 21: Manager Fund/Certifier (2<sup>nd</sup> Approver)

- f. Select your 2<sup>nd</sup> Approver.
- g. Enter any information that will assist your Agency Approver with processing your application in the Comment for Agency Approvers textbox.
- h. 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/SmarTrip® Change

The applicant can submit a request to update an address or SmarTrip® number.

- 1. Select the Address/ SmarTrip® radio button.
  - a. Click the **Continue** button. The Change Address/ SmarTrip® page is displayed.

Address/Smartrip Change				
General Information				
*ldentifier:	*****			
Name:	MARTINS	JESSICA		
	(Last)	(First)		
Email Address:	Jessica.martins@treas.gov			
Agency:	Department of Treasury (TRE-HQ)			
Work Phone:				
Work Information				
Work Address:	Work Address			
Work City:	Work City	Work State:	Work Zip:	
Residence Information				
Address:	Address			
	Address 2			
City:	City	State:	Zip:	
SmartTrip Information				
SmartTrip Card Number:				
				Submit Cancel

Figure 23: Change Address/ SmarTrip® page

- b. Update the applicable information. Only update the section that needs to be changed. You are not required to complete an entirely new application.
- c. Click the **Submit** button. The request is sent to TRANServe and a confirmation message is displayed at the top of the page.

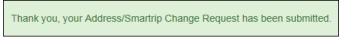


Figure 24: Address/ SmarTrip® Confirmation

**Note:** The applicant must be enrolled in the Transit Benefit Program to change address/SmarTrip® 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.

- 1. Select the Certify/Enroll radio button.
  - a. 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.
I Agree I Do Not Agree

Figure 25: Warning page

b. 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.* 

G Transit Benefit Application Worksh	set				
All Transit Benefit Program Applicants are r	equired to certify the "Total Monthly Excen	se" of their <u>Home to Work Mass</u>	Transit Commute	e.	
	it benefit and must not be included in "To				
Instructions: To calculate your "Total Mont	niy Expense"				
a. Select your transportation method(s)	"To Work" and "From Work" row(s) of each t				
	thod of transportation (Metro, BART, Subwa				
iii. Number of days you routinely a	work in a month le the price of the pass by 2, and enter the in	formation in the Monthly Evnens	e column		
d. The Total Monthly Expense value au	omatically populates	,			
*Reason for Certification:				~	
Civilian/Military: 🕤	CIVILIAN			~	
Work Status:	Full Time			~	
G Transit Benefit Transportation Met	nods				
Always follow your Agency work schedule p Defined work schedule examples:	olicy for specific guidance on the Days per h	ionth entry.			
<ul> <li>If you work a Basic schedule of 8-hou</li> <li>If you work a Flex Schedule of 9-hou</li> </ul>	irs per day, the average amount of 20 Days is per day, the average amount of 18 Days c	can be entered into the Days per	Month column		
<ul> <li>If you work a Compressed schedule (</li> </ul>	of 10-hour days, the average amount of 16 D enter the number of days you actually comr	Days can be entered into the Days	s per Month colu	mn	
		sportation methods:			
	Bus Other Bus Rail	Other Method Vanpool			
Every Transit Benefit Program Participar	nt is responsible to adjust the amount of t	their transit benefit each	Total Month	hly Expense: \$	
month to reflect the actual cost of their h	ome to work commute.				
G Transit Benefit Program Application	1				
"identifier: O					
Name:	SHEPARD (Last)	HANK (First)		V (Middle)	
Email Address:	hank.shepardtest@va.gov	-w	lork Phone: 9	(202) 555-7854	
*Common Identifier: 🕤					
Department of V.A.					
*Select Your Agency: 🕤	VA 🗸		*Region: 9		۷
'Admin: 9			~		
	Populates from Select Your Agency				
			_		
Accounting Code: 0	Click the Select button to select Accounting	ng Code	Select		
Routing Symbol: 0			Select		
	Click the Select button to select Routing S	Symbol	our contraction of the second		
Location/Building: 🕤			Select		
	Click the Select button to select Location/	Building			
	I certify that my usual monthly Transit or	ommuting costs are: 0		\$	
	This field is automatically calculated				
Work Information					
"Work Address:	Work Address				
"Work City:	Wark City	"Work State:		'Work Zip:	
Decidence information					
Residence Information					
Residence Information *Address:	Address				
	Address Address 2				
		*State:		.5ib:	
"Address: "City:	Address 2	*State:		'Zip:	
*Address: *City: Approver Information	Address 2		of Caroline D	-Zip:	
"Address: "City:	Address 2	*State:	nd Certifier: 0	*Zip:	ect
*Address: *City: Approver Information	Address 2 City Select		vd Certifier:	Set	ect
*Address: *City: Approver Information	Address 2 City Select City City City City City City City Cit	"Manager/Fun	nd Certifier: 0 mager Phone:	Sett Click the Select button to select	ect
*Adexes: *City: Approver Information *Approving Official: Ø	Address 2 City City Citek the Select button to select Approving Official Citek the Select button to select Point of Citek the Select button to select Point of	"Manager/Fun		Sett Click the Select button to select	ect
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Figure 26: Transit Benefit Application Worksheet

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

c. Select the reason for certification.

- Address or SmarTrip<sup>®</sup> Card Number Change This selection is only used to make updates to the address or SmarTrip<sup>®</sup> 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.
- New Transit Benefit Participant This selection requires the applicant to certify to completion of the Transit Benefit Integrity training.
- 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
  - d. Select your transportation method(s).
- Bus



Figure 27: Bus Method

Other Bus

Other Bus to Work:		\$		s
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Bus from Work:		\$		\$
	Name of Company	Daily Expense	Days per Month	Monthly Expense
very Transit Benefit Program Participa	nt is responsible to adjust the an	nount of their transit benefit each	Total Monthly Expense	e: \$ 0.00

Figure 28: Other Bus Method

Rail

	Name of Company	Daily Expense	Days per Month	Monthly Expense
Rail from Work:		\$		\$
	Name of Company	Daily Expense	Days per Month	Monthly Expense

Figure 29: Rail Method

Other Method

	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Method from Work		\$		S
	Name of Company	Daily Expense	Days per Month	Monthly Expense

Figure 30: Other Method

Vanpool

	Name of Company	Daily Expense	Days per Month	Monthly Expense
Vanpool:		S		S

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.

A١	vays follow your Agency work schedule policy for specific guidance on the Days per Month entry.
De	fined work schedule examples:
	<ul> <li>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</li> <li>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</li> <li>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</li> <li>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</li> <li>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</li> <li>If you work and the schedule of 10-hour days, the average amount of 16 Days can be entered into the Days per Month column</li> </ul>

Figure 32: Sample Agency Work Schedule Policies

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

	Name of Company	Daily Expense	Days per Month	Monthly Expense
Rail from Work:	BFW	\$ 3.20	16	\$ 51.20
	Name of Company	Daily Expense	Days per Month	Monthly Expense
	BTW	\$ 3.20	16	\$ 51.20

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.

f. 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.

- g. 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.
- h. Select the Region closest to your physical work location
- i. Select the Admin.
- j. Depending on the Agency three optional fields may be displayed (i.e. Accounting Code, Routing Symbol, and Location/Building). ). For <u>HUD-Region 4</u> these fields are labled: Local Coordinators and Office of Administration. Click the **Select** link to display the list for your agency.

Accounting Code: 🤤		Select
	Click the Select button to select Accounting Code	
Routing Symbol: 🥑		Select
	Click the Select button to select Routing Symbol	
Location/Building: 🥑		Select
	Click the Select button to select Location/Building	

- k. Enter your Work Information.
- 1. Enter your Residence Information. (The address from which you routinely commute)
- m. Click the **Select** button to display the list for your agency's 1<sup>st</sup> Approvers.

Appr	oving Official		×
	Name	Email	
	Type to filter		
C	HARRY CAREY	harry.carey@treas.gov	
		« < 1 > »»	
			Close

Figure 34: 1<sup>st</sup> Approver

- n. Select your 1<sup>st</sup> Approver. (Check the help menu to clarify)
- o. Click the **Select** button to display the list for your agency's 2<sup>nd</sup> Approvers. (Check the help menu to clarify)

	Name			Emai	1		
	Type to filter						
	DARREN CHANG			darre	n.chang@ed	l.gov	
;	HARRY CAREY			harry	.carey@trea	s.gov	
		<<					

Figure 35: 2<sup>nd</sup> Approver

p. Select your 2<sup>nd</sup> Approver.

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

Name	Re	gion	Email
Type to filter		~	
TREASURY POC	DC	:	POC@Agency.gov
	<< < 1	> >>	

Figure 36: Points of Contact

- r. Select your Point of Contact.
- s. Enter your SmarTrip® card information. If you have not purchased a SmarTrip®, enter NA. See <u>Appendix A SmarTrip® Card Instructions</u>.
- t. Enter any information that will assist your Agency Approvers with processing your application in the Comment for Agency Approvers textbox.

*Identifier: 🕤	****				
Name:	RODRIGUEZ	KAREN		LYNN LEE	
	(Last)	(First)		(Middle)	
Email Address:	Karen.rodrigueztest@treas.gov		"Work Phone: 😔	(202) 555-776	4
*Common Identifier: 😔	HELLOKITTY				
epartment of Treasury					
*Select Your Agency: 😡	TRE-HQ ¥		*Region: 😡	DC	
*Admin: 😡	TREASURY		~		
	Populates from Select Your Agency				
Accounting Code: 0			Select		
	Click the Select button to select Accounti	ng Code			
Routing Symbol: 😜			Select		
	Click the Select button to select Routing	Symbol			
Location/Building: 9			Select		
	Click the Select button to select Location	/Building			
	I certify that my usual monthly Transit c This field is automatically calculated	ommuting costs	are: 😧	\$ 102.40	
	I certify that my usual monthly Parking of This field is automatically calculated	commuting costs	are:	\$ 192.00	
Vork Information					
"Work Address:	123 TEST STREET				
"Work City:	WASHINGTON	"Work State:	DC 🗸	"Work Zip:	20590
esidence Information					
"Address:	505 GAYLEY AVENUE				
	Address 2				
*City:	LOS ANGELES	*State:	CA 🗸	*Zip:	90024
pprover Information					
*Approving Official: 9	CAREY, HARRY Select.		"Manager/Fund Certifier: 😔	CHANG, DAR	REN Selec
	Click the Select button to select				ct button to select
	Approving Official			Manager/Fund	d Certifier
"Point of Contact: 😔	TREASURY POC Select		Manager Phone:		
	Click the Select button to select Point of				
	Contact				
"SmartTrip Card Number: 😜	000123456				
-smarting card wumber: 划	000123400				
Comment for Agency Approvers: 🕤	HELP ME HELP YOU				
	Vau have 4070 sharesher samelalar				
	You have 1979 characters remaining				

Figure 37: Completed Transit Benefit Application

u. Click the **Continue** button. The SmartBenefits<sub>®</sub> Program page is displayed.

Smart Benefits Program		
If you would like to enroll in the Smart Benefits Program or are already a Smart Benefits participant, p from the Smart Benefits Team will contact you shortly. The Smart Benefits Program eliminates the ne monthly transit benefit will be downloaded directly to your Smart Benefits Card on the first day of ever	ed to wait in line to pick up fa	
YES	I would like to enroll	NO Thank You

Figure 38: SmartBenefits • Program page

- v. 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®)
- w. 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.

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



Figure 39: Transit Benefit Program Confirmation

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

1. 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.

3
Employer: Federal Deposit Insurance Corporation
Request Information
O Update Disapproved Certification 9
Continue

Figure 40: Select An Action To Continue page

- a. Select the Update Disapproved Application radio button.
- b. 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 failse, fictilious, or fraudulent certification may constitute criminal violations panishable under Title 10, Initied 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 dismissial.
- 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.
<ul> <li>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.</li> </ul>
- 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

Figure 41: Warning page

c. 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.

	Disapprov	ed Reason: trace		
ndicates required field.				
Certify/Enroll Status: Certifica	tion Disapproved			
Transit Benefit Application Worksh	eet			
All Transit Benefit Program Applicants are r	equired to certify the "Total Monthly Expe	nse" of their Home to Work Mass	s Transit Commute	
Parking fees are not eligible for the trans	it benefit and must not be included in "	Total Monthly Expense".		
instructions: To calculate your "Total Mont				
<ol> <li>Name of Company for your me B. Daily or Monthly Expense</li> </ol>	"To Work" and "From Work" row(s) of each thod of transportation (Metro, BART, Subu work in a month is the price of the pass by 2, and enter the	iay)		
d. The Total Monthly Expense value au	iomatically populates	information in the Monthly Expension		
'Reason for Certification:	Rate Change		~	
Civilian Military: O	CIVILIAN		~	
Work Status:	Pull Time		~	
C Transit Benefit Transportation Met	nods			
Always follow your Agency work schedule p Defined work schedule examples • If you work a Basic schedule of 6-hou • If you work a First Schedule of 8-book • If you work a Compressed schedule • If you work a trip schedule • If you work at the schedule of the schedule • If you work at the schedule of the schedule • If you work at the schedule of the schedule of the schedule • If you work at the schedule of	its per day, the average amount of 20 Day is per day, the average amount of 16 Day 10 Hour day, the average amount of 16 enter the number of days you actually cor "Select your to	s can be entered into the Days per can be entered into the Days per Days can be entered into the Day moute forftom work. ansportation methods.	ir Month column Month column js per Month column	
	Bus Other Bus Ra	el Other Method Vanpool		
Bus to Work:	BTW Name of Company	S 4.50 Daily Expense	16 Days per Month	\$ 72.00 Monthly Expense
Bus from Work:	BFW	\$ 4.50	16	\$ 72.00
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Every Transit Benefit Program Participar			1	
Every Transit Benefit Program Participan month to reflect the actual cost of their h	it is responsible to adjust the amount of ome to work commute.	wew wansn benefit each	Total Monthly Expense:	\$ 144.00
G Transit Benefit Program Application				
	Disapprove			
		d Reason: trace		
*identifier: O	. Mass.	d Reason: trace		
*idontifier: •	TESTON	TRACEY		
Name	TESTON (Last)	TRACEY (First)		
	TESTON	TRACEY (First)	Mork Phone: O (418) 555-	254
Name	TESTON (Last)	TRACEY (First)	Noth Phone: Q (410) 555-	8554
Narra: Ernail Address:	TESTON (List) Tracey Teston@tk: gov 34360F50	TRACEY (First)		854
Name: Email Address: "Common Memiliker: Q	TESTON (List) Tracey Teston@tk: gov 34360F50	TRACEY (First)	Nork Phone: 0 (410) 555- 7Region: 0 DC	2554
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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.
  - d. 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 user must be a 1<sup>st</sup> Approver, for instance a Supervisor, Approval Officer, or Approval/Supervisor (a combination of the 1<sup>st</sup> and 2<sup>nd</sup> Approvers), 2<sup>nd</sup> Approver, for instance a Manager/Fund Certifier or a 3<sup>rd</sup> Approver (Program Admin) 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.  $1^{st}$  and  $2^{nd}$  Approvers will only see an application on which an employee has chosen their name.

# 4.1 Approval Process

- 1. Log on as an approver.
  - a. From the Home page, click the **Approval Section** button; approval page is displayed.

S. Departme	ent of Tran	sportation									Busines	SERVE	
Home	Transit A	pplication	Appro	oval Section -	Utilities 🕶	Admin 👻					👤 Angela	a Robinson	🖱 Logo
Per	nding	Transit A	Applic	ation 🚳	Approving	Official							
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	View	DOT-FAA		AST	01/0	7/2016	Rate Chang	ge	PARKER DUNPHY	Approve	Disapprove	X Delete	
2	Wew	DOT-OST-I	И	OST-M	12/0	6/2015	SmarTrip a Change	nd Rate	ANGELICA BERKENBILE	Approve	Disapprove	X Delete	
C	• View	DOT-OST-I	М	OST-M	01/2	0/2016	Monthly Certification	1	ROBERT REED	Approve	Disapprove	X Delete	
2	View	DOT-TBM		BTS	01/1	3/2016	12345		JAMES PERRY	Approve	Disapprove	X Delete	
E	View	DOT-TBM		BTS	01/1	3/2016	12345		JOSEPH WILSON	Approve	Disapprove	X Delete	
	View	TRE-HQ		TREASURY	01/1	9/2016	Rate Chang	ge	KAREN RODRIGUEZ	Approve	Disapprove	X Delete	
E	• View	VA			01/0	7/2016	Agency Cha	ange	ANDREW FENSTERMACHER	Approve	Disapprove	× Delete	
	∎ View	VA			01/1	9/2016	Withdraw fr Program	om the	SHARONDA MILLS	Approve	Disapprove	× Delete	
							K K 1	> >>	I				
						Note:	Paging will reset	your selection	ons		_	_	
											Proces	ss Reset	

Figure 43: Approval page

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



b. Review according to your Agency Policy, and then select Approve to approve the application. After the selection is made the label will change into a checkmark.



c. Review according to your Agency Policy then select Disapprove to disapprove the application. After the selection is made the label will change into a checkmark.

Approve	<b>~</b>
Reason	

• A reason is required when an application is disapproved. Enter a reason in the Reason textbox. Where possible give instructions for correction. (i.e. Correct Supervisor's name)

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



d. 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:** 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.

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



**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 submenus. Click the sub-menu to enter the appropriate Approval Queue to review an application.

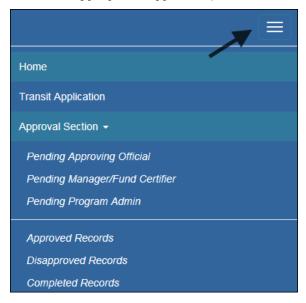


Figure 44: Approval Section Menu Options

### 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.)

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

Are you sure you want to delete the following Transit Applica page.	tion? Click the Continue button below to delete the Transit Application. Click the Cancel button to return to the previous
	Continue Cancel
Certify/Enroll (KAREN RODRIGUEZ)	Status: Certification Pending (Approving Official)
C Transit Benefit Application Worksheet	
All Transit Benefit Program Applicants are required to cert	ify the "Total Monthly Expense" of their Home to Work Mass Transil 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"	

Figure 45: Delete Confirmation page

a. 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)

Pending Transit Application 🚳 Approved								
	Mode $\Leftrightarrow$	Admin	Request Date	Туре	Name	Approval Da	te 🔶	
	Type to filte	Type to filter	Type to filter	Type to filter	Type to filter			
🗁 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

ending Transit Application (1) DisApproved								
	Mode \$	Admin	🔶 Request Date 👙	Туре	Name 🎄	Reason		
	Type to filte	Type to filter	Type to filter	Type to filter	Type to filter			
🗁 View	DOT-OST-M	OST-M-01	07/07/2015	SmarTrip and Rate Change	MOBILE APPTEST	TEST	X Delete	
🗁 View	ED	OUS	10/30/2015	Rate Change	DARREN CHANG	ghfcfgnhfg	X 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 an Agency/Mode from the dropdown to limit the search results. Click the **Search** button to return all completed records.

Find Completed App	plications		
First Name:	First Name		
Last Name:	Last Name		
Agency/Mode:	· ·		
	*NOTE: Leave all fields blank to Find all Completed Applications.		
	Enter any portion of your desired search criteria. The system will search for all entries that begin with the entered values.		
		Search	Cancel

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.

Pending	Transit Applicatio	On 538 Completed			
	Mode	4 Admin	Request Date	Туре	♦ Name ♦
	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter
🗁 View	DOD-NCR	A-NGB	12/30/2015	Agency Change	ANNIE AARON
🗁 View	DOT-FTA	FTA	09/03/2015	TEST CERTIFICATION	HUNG CHUN
🖆 View	DOT-FTA	FTA	09/04/2015	Agency Change	HUNG CHUN

Figure 49: Completed Records

# 5. ADMIN

The Admin function allows the Program Office to update users to 1<sup>st</sup> or 2<sup>nd</sup> Approver.

**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.

Home	
Transit Application	
Approval Section -	
Utilities -	
Admin 🗸	
User Admin	

Figure 50: Admin Menu Options

### 5.1 User Admin

1. 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:	~ ~	
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

- a. To search for an existing user; enter the Username, First Name, Last Name, or select an Agency/Mode or Role from the dropdown menu.
- b. 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.

Us	ser Admin 🗿				
	User Name	First Name 🗸	Last name 🛧	Mode	Role V
		Type to filter	Type to filter	Type to filter	Type to filter
1	tammydehl@usda.gov	Tammy	Dehl	USDA	Manager/Fund Certifier X Delet
2	frederickgaines@usda.gov	Frederick	Gaines	USDA	Manager/Fund Certifier X Delet
3	aden.jefferstest@usda.gov	Aden	Jeffers	USDA	Applicant X Delet
			«« « <b>1</b> »	39 39	

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

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

Add User Account	Information
*User Name:	Government Email Address
*First Name:	First Name Middle Name: Middle Name "Last Name: Last Name
*Agency/Mode:	Agency options will show once your Government Email Address has been validated
Phone Number:	
*Role:	Test Role V
	Add User Reset Cancel

Figure 53: Add User Account Information page

- a. Enter the applicant's official government email address in the User Name textbox.
- b. Complete the account information form.
- c. Select the user role from the Role dropdown.
- d. Click the Add User button. The Add User Confirmation displays.

User eddie.makaltest@ed.gov has been Created
Thank you. The Login Password has been sent to eddie.makaltest@ed.gov.

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 <u>all users should create their own profile</u> 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

1. From the User Admin page; click the <u>Username</u> link. The Update User Account Information page displays with the applicant's information.

Update User Accou	int Information			
"User Name:	eddie.makaltest@ed.gov			
*First Name:	Eddie Middle Na	me: Middle Name	*Last Name:	Makal
*Agency/Mode:	ED Agency options will show once your Government En Address has been validated	all		
Phone Number:	(202) 555-2352 Applicant			
	Allow Access to Agency Reports			
	Update User	Reset Cancel		

Figure 55: Update User Account Information page

- a. Update the applicant's user information.
- b. Click the Update User button. The Update User Confirmation displays.

User eddie.makaltest@ed.gov has been Updated
--

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

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



Figure 57: Confirm Delete Message

a. 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.

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

Check All					
User A	dmin 🗿				
	User Name	First Name $\vee$	Last name 🛧	Mode	Role
		Type to filter	Type to filter		
select	tammydehl@usda.gov	Tammy	Dehl	USDA	Manager/Fund Certifier
select	frederickgaines@usda.gov	Frederick	Gaines	USDA	Manager/Fund Certifier 🗸 🗸
select	aden.jefferstest@usda.gov	Aden	Jeffers	USDA	Applicant 🗸
			«« « <mark>1</mark> » »»		
					Process Reset

Figure 59: Bulk Update View page

#### 5.1.4.1 Single User Role Update

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

	ferderickering Our de env	Frederich	0-1	11004	Manager/Fund Certifier	~	
	frederickgaines@usda.gov	Frederick	Gaines	USDA			

Figure 60: Single Username Select

a. Click the down arrow for the User Role dropdown menu.

select	tammydehl@usda.gov	Tammy	Dehl	USDA	Mananer/Eund Certifier Test Role Read Only Applicant
	frederickgaines@usda.gov	Frederick	Gaines	USDA	Approving Official Manager/Fund Certifier Approval/Supervisor Program Admin TRANServe TBM
select	aden.jefferstest@usda.gov	Aden	Jeffers	USDA	TRANServe Admin System Admin

#### Figure 61: Role Change Select

b. Select the desired user role from the dropdown menu.

rederickgaines@usda.gov Frederick Gaines USDA	USDA Approving Official	Frederick Gaines	frederickgaines@usda.gov Frederick	<ul> <li>Image: A second s</li></ul>
---	-------------------------	------------------	------------------------------------	--

Figure 62: Role Update

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



Figure 63: Confirm Bulk Update Message

d. 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

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

emma.clarkson@treas.gov	Emma	Clarkson	TRE-HQ	~	Applicant	~
timothy.cole@treas.gov	Timothy	Cole	TRE-HQ	~	Applicant	~
kevin.drummond@treas.gov	Kevin	Drummond	TRE-HQ	~	Applicant	~

Figure 66: Multiple Username Select

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

Add New	User Individual View			Bulk Role Update
				Test Role Read Only Applicant Approving Official Manager/Fund Certifier
lame 🗸	Last name 🛧	Mode	Role	Approval/Supervisor Program Admin TRANServe TBM TRANServe Admin System Admin
to filter	Type to filter			System Admin

*Figure 67: Bulk Role Update Select* 

b. Select the desired user role from the dropdown menu.

emma.clarkson@treas.gov	Emma	Clarkson	TRE-HQ V Read Or	nly 🗸
timothy.cole@treas.gov	Timothy	Cole	TRE-HQ V Read Or	nly 🗸
kevin.drummond@treas.gov	Kevin	Drummond	TRE-HQ V Read Or	nly 🗸

Figure 68: Bulk Role Update

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

Confirm Bulk Update	×
Run Bulk Update for selected 3 User(s)?	
	Cancel Process

Figure 69: Confirm Bulk Update Message

d. 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	

Figure 70: Pending Application Link

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

	Mode	Admin 🔶	Request Date	Туре	Name 🔶	
	Ту	Type to 1	Type to filt	Тур	Тур	
🖆 View	TRE- HQ	TREASURY	07/29/2015	Rate Change	HUNG3 CHUN3	
		<<	< 1 > >	>		

Figure 71: Pending Transit Benefit Application Status page

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

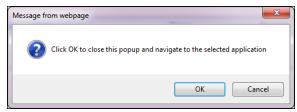


Figure 72: Open Application Confirmation Message

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.

	Approve	Disapprove	Cancel	[History]
Reason:				
Certify/Enroll (ANDREW FEN	ISTERMACHER)	Status: Certificat	tion Pending (Appre	oving Official)

# 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.

- 1. 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: <u>http://www.wmata.com/fares/purchase/</u>

**Note:** An online order requires you to provide a shipping address which must match the billing address on line with your credit card provider.

- a. 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:

Card Type #1: 🔘	see mbum bo: WMWTA, 600 Filth: Strest, N.W. D.C. 20001 wrTho: and SmartBerefice: loops of the stateward markes of VMMTA. 012345678 C3DW803
	serial number
Card Type #2: 🔘	Bise return to: WNATA, SOD Fifth Street, N.W.
	writing and Strandsmitter ingest 012345678 3 C3DW803
	serial number check sum
Card Type #3: 🔘	e return to: WMATA, 600 Fifth Street, N.W. LC. 20001
	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
	of and SmartBenefits' logos stelleevice marks of WMATA. GD1137 0167 0693 4564 7992 9601
	serial number

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.