

# TRANSIT BENEFIT PROGRAM APPLICATION SYSTEM <u>APPLICANT</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	Title	Email
MDA Mass Transit Benefit Program (MTBP) Office	MDA/DPLS	<u>MDADPLSMTBP@mda.mil</u>

# 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.

Department of Transportation		U.S. Department of Transportation TRANSERVE Business in motion	
			Ð
* 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:	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 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	Register Account Information					
"User Name:	Government Email Address					
*First Name:	First Name					
Middle Name:	Middle Name					
*Last Name:	Last Name					
*Agency/Mode:	VA 🗸					
	Agency options will show once your Government Email Address has been validated					
Phone Number:						
	Register Reset Cancel					

Figure 2: Register Account Information page

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

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

mberly j.gravestest@va.gov
inberly
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 Pass	word?
	Not registered yet? Register	
	**WARNING**WARNING***WARNING**	
	You are accessing a U.S. Government information system, which includes this computer, the computer network on which it is connected, all other computers connected to this network, and all storage media connected to this computer or other computers on this network. This information system is provided for U.S. Government use only. Unauthorized or improper use of this information may result in disciplinary action, as well as civil and criminal penalties. By using this information system you consent to the following:	^
	<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 2) • Lowercase characters (A through 2) • Base 10 digits (0 through 9) • Non-alphabelic characters (for example, I, \$,%) Password Witzprie 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 Pag

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.
  - 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.
  - 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.

Q U.S. Depart	Iment of Transportation			U.S. Department of Transportat	
Home	Transit Application	Utilities -		L Kimberly Graves	C Logout
		F	Parking and Transit Benefit Public Website Version v 3.0		
			Transit Benefit Application		
			🌣 My Account		
				Friday, Ja	inuary 15, 2016

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. Applicants do not see all sections

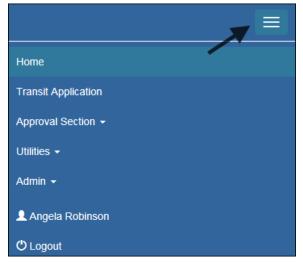


Figure 15: Additional Menu Options

## 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 Cont	inue	
	Employer: Department of Transportation	
	Request Information	
	○ Withdraw from the Program <b>Q</b>	
	○ Certify/Enroll \varTheta	
	Continue	

Figure 16: Select An Action To Continue page

## 3.1.1 Request Information

The applicant can request information from the MDA/DPLS MTBP Office by submitting questions regarding the transit benefit program or a submitted application through <u>MDADPLSMTBP@mda.mil</u>.

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 Co	ontact			
*Question:					
			Send Request Cancel		

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.



#### 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:		<b></b>	
	Click the Calendar to select a Withdrawal D	ate	
*Approving Official: 😯		Select	
	Click the Select button to select Approving	Official	
*Manager/Fund Certifier: 🕢	Click the Select button to select Manager/F	Select	
	Click the Select button to select managern	und Certiller	
Comment for Agency Approvers: 🕢			
	You have 1995 characters remaining		
			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 >	>>
		Close

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

- d. Select your 1<sup>st</sup> Approver.
- 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.harpertest@va.go	V
C	JESSICA MARTIN			jessica.martins@va.go	v
		<< <	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.

Thank you, your application to Withdraw from the Program has been submitted.

#### 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<sup>®</sup> 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 16, 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 demissal.
- 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.

Certify/Enroll						
C Transit Benefit Application Workshi	ret					
	All Transit Benefit Program Applicants are required to certify the "Total Monthly Expense" of their Home to Work Mass Transit Commute					
	it benefit and must not be included in "Total Monthly Expense".	ATTAL MARK.				
Instructions: To calculate your "Total Month	ily Expense"					
a. Select your transportation method(s)						
<ul> <li>Enter the following information in the         <ol> <li>Name of Company for your me</li></ol></li></ul>	"To Work" and "From Work" row(s) of each transportation method: thod of transportation (Metro, BART, Subway)					
iii. Number of days you routinely v	rork in a month e the price of the pass by 2, and enter the information in the Monthly Expense column.					
d. The Total Monthly Expense value aut	omatically populates					
*Reason for Certification:		~				
Civilian/Military: 🕤	CIVILIAN	~				
Work Status:	Full Time	~				
G Transit Benefit Transportation Meth	ods					
Always follow your Agency work schedule p	olicy for specific guidance on the Days per Month entry.					
Defined work schedule examples:						
<ul> <li>If you work a Flex Schedule of 9-hour</li> </ul>	rs per day, the average amount of 20 Days can be entered into the Days per Month co s per day, the average amount of 18 Days can be entered into the Days per Month co if 10-hour days, the average amount of 16 Days can be entered into the Days per Mon	lumn				
<ul> <li>If you telecommute or work part time,</li> </ul>	enter the number of days you actually commute to/from work.	en column				
	*Select your transportation methods:					
	Bus Other Bus Rail Other Method Vanpool					
Every Transit Benefit Program Participan month to reflect the actual cost of their h	t is responsible to adjust the amount of their transit benefit each Tot	al Monthly Expense: \$				
nona to resect the actual cost of them	the work commute.					
C Transit Benefit Program Application	1					
"Identifier: 😡						
Name:	SHEPARD HANK	v				
warne:	(Last) (First)	(Middle)				
Email Address:	hank.shepardtest@va.gov "Work Phone	(202) 555-7854				
*Common identifier: 😔						
Department of V.A.						
*Select Your Agency: O	VA V 'Region	:0 ~				
"Select Your Agency: 😜	VA Va Vikegion					
*Admin: 😜						
	Populates from Select Your Agency					
Accounting Code: 0	Select					
	Click the Select button to select Accounting Code	-				
Routing Symbol: ()	Select	н. —				
	Click the Select button to select Routing Symbol	_				
Location/Building: 🕤	Select. Click the Select button to select Location/Building					
	I certify that my usual monthly Transit commuting costs are: 0	\$				
	This field is automatically calculated	2				
Work Information						
"Work Address:	Work Address					
"Work City:	Work City Work State:	'Work Zip:				
Residence Information						
*Address:	Address					
	Address 2					
"City:	City *State:	*Zip:				
Approver Information						
"Approving Official: 0	Select 'Manager/Fund Certifier	:0 Select				
	Click the Select button to select	Click the Select button to select				
	Approving Official	Manager/Fund Certifier				
"Point of Contact: 😡	Select Manager Pho	ine:				
	Click the Select button to select Point of Contact					
*SmartTrip Card Number: 0						
Comment for Agency Approvers: 0						
	You have 1995 characters remaining					
	-					
		Continue Cancel				

Figure 26: Transit Benefit Application Worksheet

Note: \* indicates required field.

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

Bus to Work:		S		S
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Bus from Work:		S		S
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Bus to Work:		\$		S
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Bus from Work:		\$		S
	Name of Company	Daily Expense	Days per Month	Monthly Expense
ery Transit Benefit Program Participa	at is responsible to adjust the an	sount of their transit benefit each	Total Monthly Expen	se: \$ 0.00

Figure 27: Bus Method

Other Bus

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

Figure 28: Other Bus Method

Rail

Rail to Work:		\$		S
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Rail from Work:		5		s
	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:	\$ 0.00

#### Figure 29: Rail Method

Other Method

Other Method to Work		\$		2
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Method from Work				
Other Method from Work		\$		S
	Name of Company	Daily Expense	Days per Month	Monthly Expense

Figure 30: Other Method

Vanpool

Vanpool:		\$		S
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Every Transit Benefit Program Participa month to reflect the actual cost of their i		nount of their transit benefit each	Total Monthly Expense:	\$ 0.00

Figure 31: Vanpool Method

**Note:** If all of the methods of transportation are selected, all of the methods will display in one table. **Note:** When filling out the method of transportation table, be sure to follow your Agency's work schedule policies.

Always follow your Agency work schedule policy for specific guidance on the Days per Month entry.
Defined work schedule examples:
<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 Fiex Schedule of 8-hours per day, the average amount of 16 Days can be entered into the Days per Month column</li> <li>If you work a Compresed 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 Compresed 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 Compresed 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 part lime, enter the number of days you actually commute forfrom work.</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)



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 2 letter that you belong to.

j. Depending on the Agency three optional fields may be displayed (i.e. Accounting Code, Routing Symbol, and Location/Building). For <u>MDA</u> please select your location. 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.

Approving Official	×
Name	Email
Type to filter.	
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		Email	
Type to filter			
DARREN CHANG		darren.chang@ed.go	ov.
HARRY CAREY		harry.carey@treas.g	ov
	<< <	>>	

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

C Transit Benefit Program Application	1				
*Identifier: 📀	****				
Name:	RODRIGUEZ	KAREN		LYNN LEE	
	(Last)	(First)		(Middle)	
Email Address:	Karen.rodrigueztest@treas.gov		"Work Phone: 9	(202) 555-7764	
*Common Identifier: 9	HELLOKITTY				
Department of Treasury					
*Select Your Agency: 0	TRE-HQ ¥		*Region: 🕥	DC	
*Admin: 😜	TREASURY		~		
	Populates from Select Your Agency				
Accounting Code: 0			Select		
	Click the Select button to select Accounti	ing Code	OCACULA.		
Routing Symbol: 😡			Select		
	Click the Select button to select Routing	Symbol			
Location/Building: 🕤	Click the Select button to select Location	VBuilding	Select		
	I certify that my usual monthly Transit c		: <b>0</b>	\$ 102.40	
	This field is automatically calculated			3 102.40	
	I certify that my usual monthly Parking This field is automatically calculated	commuting costs are	e:	\$ 192.00	
Vork Information					
"Work Address:	123 TEST STREET				
"Work City:	WASHINGTON	"Work State:	DC 🗸	"Work Zip:	20590
Residence Information					
*Address:	505 GAYLEY AVENUE				
	Address 2				
*City:	LOS ANGELES	*State:	ca 🗸	*Zip:	90024
Approver Information					
*Approving Official: 6	CAREY, HARRY Select		*Manager/Fund Certifier: 😜	CHANG, DARRE	N Sele
	Click the Select button to select Approving Official			Click the Select Manager/Fund C	button to select Certifier
"Point of Contact: O	TREASURY POC Select Click the Select button to select Point of	I	Manager Phone:		
	Contact				
*SmartTrip Card Number: 9	000123456				
*SmartTrip Card Number: •	000123456 HELP ME HELP YOU				
	HELP ME HELP YOU				

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 participan from the Smart Benefits Team will contact you shortly. The Smart Benefits Program eliminates the monthly transit benefit will be downloaded directly to your Smart Benefits Card on the first day of e	need to wait in line to pick up fa	
	ES 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<sup>®</sup> program. By clicking yes, you agree to have your transit benefit downloaded to your SmarTrip<sup>®</sup> card the first of every month. (Mandatory for methods that accept SmarTrip<sup>®</sup>)
- 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.

Thank you, your New Transit Benefit Participant Application has been submitted.
Thank You for enrolling in the Transit Benefit Program. Someone from the Smart Benefits Team will be contacting you shortly.

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

Disapproved Applications are sent back to the applicant. The applicant must make corrections and resubmit the application to continue the application approval process.

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.

	Your Current Application Status: Certification Disapproved Reason: TEST Disapproval	
Select an Action to Continue		
	Employer: Federal Deposit Insurance Corporation	
	Request Information	
	O Update Disapproved Certification	
	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 contractions concerns an until within the jurisdiction of an agency of the United States. Making a faile, fittilious, or fraudulent certification may constitute criminal visualizes punctualize under Title 10, United States Code, Section 1001, by imprisonment up to the years and fines up to \$10,000 for each offense, and/or agency disciplinary actions up to and including deministal.
- 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.
<ul> <li>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.</li> </ul>
<ul> <li>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.</li> </ul>
- 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.

	Detete Application and Start Over
	Disapproved Reason: trace
ndicates required field.	
Certify/Enroll Status: Certificat	tion Disapproved
C Transit Benefit Application Workshe	eet
	equired to certify the "Total Monthly Expense" of their Home to Work Mass Transit Commute.
	equired to cently the "Total Monthly Expense" of their <u>Home to Work Mass Transit Commute</u> . it benefit and must not be included in "Total Monthly Expense".
Instructions: To calculate your "Total Month	
	"To Work" and "From Work" row(s) of each transportation method: third of transportation (Methic, IAART, Subway)
<ul> <li>Number of days you routinely w c. If you purchase a Monthly pass, divide d. The Total Monthly Expense value auto</li> </ul>	work in a month In the price of the pass by 2, and enter the information in the Monthly Expense column.
"Reason for Certification:	Rate Change
Civilian Military: 0	CMUJAN
Work Status:	Rul Time 🗸
G Transit Benefit Transportation Meth	
<ul> <li>I ransit Benefit Transportation Meth</li> </ul>	005
Always follow your Agency work schedule po Defined work schedule examples:	olicy for specific guidance on the Days per Month entry.
<ul> <li>If you work a Basic schedule of 8-hour</li> </ul>	ars per day, the average amount of 20 Days can be entered into the Days per Month column in par day, the average encount of 18 Days can be entered into the Days per Month column.
<ul> <li>If you work a Compressed schedule or</li> <li>If you telecommute or work part time,</li> </ul>	rs per day, the average amount of 18 Days can be entered into the Days per Month column of 10-hour days, the average amount of 16 Days can be entered into the Days per Month column enter the number of days you actually commute to/brow work.
	"Belect your transportation methods:
	Bus Other Bus Rat Other Method Vanpool
Bus to Work:	BTW \$ 4.50 16 \$ 72.00
	Name of Company Daily Expense Days per Month Monthly Expense
Bus from Work:	BPW \$ 450 16 \$ 72.00
	Name of Company Daily Expense Days per Month Monthly Expense
Every Transit Benefit Program Participan month to reflect the actual cost of their h	nt is responsible to adjust the amount of their transit benefit each Total Monthly Expanse: S 144.00
C Transit Benefit Program Application	
	"
	Disapproved Reason: trace
'identifier: 😡	
Name:	TESTON TRACEY
	(Last) (First)
Email Address:	Tracey:Teston@fdic.gov "Work Phone: • (410) 555-4554
'Common Identifier: Q	34350/10
Federal Deposit Insurance Corporation	3030°10
	ассоло к Гос V Терик Ф Сс
Federal Deposit Insurance Corporation	n
Federal Deposit Insurance Corporation	n [Toc ♥] %week.♥ [cc
Federal Deposit Insurance Corporation	TOC V Nugher 0 CC CC V Populates from folier Your Agency Sect
Federal Deposit Insurance Corporation "Select Your Agency: O 'Admin: O	TOC  TOC  TOC  TOC  TOC  TOC  TOC  TOC
Federal Deposit Insurance Corporation "Select Your Agency: O 'Admin: O	TOC V Nugher 0 CC CC V Populates from folier Your Agency Sect
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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.

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.

# 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 sde/service 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.