



TRANSIT BENEFIT PROGRAM

Applicant Guide

Updated 9.19.2014

Apply for the Transit Benefit Program

1. Complete Transit Benefit Integrity Awareness Training
2. Purchase and Register a SmarTrip® card
3. Use your SBA federal email address to create a User Account
4. Submit the Transit Benefit Program expense worksheet and application

Note: TRANServe Debit Card holders must register debit card with JPMorgan once received from your point of contact (instructions about registering card provided upon receipt of your debit card).

1. Complete Transit Benefit Integrity Awareness Training by:

- A. Logging on to <http://transerve.dot.gov/>
- A. Click on “Participants”
- B. Click on “SBA”
- c. **Click on: “SBA Transit Benefit Integrity Awareness Training”**
 - a) Complete the training
 - a) You are required to certify completion on the Transit Benefit Application

2. Purchase and Register a SmarTrip® card

SmarTrip® card use is mandatory for all participants in the National Capital Region who ride Metro Rail, Metro Bus, and all Washington, DC Metropolitan Area bus systems including ART - Arlington Transit, DASH, DC Circulator, CUE Fairfax, Quicks Bus, Loudon Commuter Bus, PRTC OmniRide, Montgomery County Ride On and The Bus

A. Purchase a SmarTrip® Card

This is a reloadable electronic fare card. Using a reloadable fare card supports government initiatives to support and improve the environment.

1. You can make a purchase at a Metro Sales Store, Kiosk (located in Metro Stations with parking), a Commuter Store and many retail establishments.

For more information on purchase locations:

<http://www.wmata.com/fares/purchase/where.cfm>

2. You can also purchase a SmarTrip® Card on line:

<http://www.wmata.com/fares/purchase/>

An online order requires you to provide a shipping address that matches the billing address on record with your credit card provider.

B. Create a Personal Account and 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 to registering your card is to protect the funds on the card. If lost or stolen you may cancel it. After you replace your SmarTrip® card, you can transfer the funds to the new card.

1. Register your SmarTrip® card here:

<https://smartrip.wmata.com/Registration/Register.aspx>.

2. Indicate the type of SmarTrip® card by matching the serial number on the back with the circled illustrations on the next page.

Examples

TIP

Add zeros to the **front** to create a nine (9) digit card number.

i.e. 000654327

Card Type #1: Ⓞ

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

irTrip® and SmartBenefits® logos
id trade/service marks of WMATA.

012345678 C3DW803

serial number

Card Type #2: Ⓞ

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

irTrip® and SmartBenefits® logos
id trade/service marks of WMATA.

012345678 3 C3DW803

serial number check sum

Card Type #3: Ⓞ

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

irTrip® 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.
D.C. 20001

irTrip® and SmartBenefits® logos
trade/service marks of WMATA.

GD1137 0167 0693 4564 7992 9601

serial number

SmarTrip® Card Numbers

HOW TO FIND SMARTRIP CARD NUMBER?

SmarTrip cards are limited to WMATA commuters in the NCR (Washington, DC-Virginia-Maryland)

If you do not commute on WMATA in these areas enter N/A.

Enter the SmarTrip Card number without dashes or spaces.
See the samples below to identify your card number series, then insert the numbers on the application in the same format that follow =

Type #1: 012345678 C3DW803 = 012345678

Type #2: 12345678 3 C3DW803 = 123456783

Type #3: C3DW017 0020 0001 5644 364 6 = 0020000156443646

Type #4: GD1137 0167 0693 4564 7992 9601 = 01670693456479929601

Close

Still have Questions?

- To Contact WMATA directly. Call: 202-637-7000 or Email: smartrip@wmata.com
- To submit a Web Inquiry: http://www.wmata.com/about_metro/contact_us/ridercorcomment.cfm

Ride more than one NCR system?

- Allot some to your benefit to your SmarTrip® card and the rest to your TRANServe Debit Card.

Use your Transit Benefit

Remember: The Transit Benefit is to commute between your Small Business Administration Duty Station and Home.

No Office travel is permitted.

1. Anytime the amount you receive exceeds the amount you need you must adjust!

A. An electronic transit benefit is swept at the end of each funding cycle.

B. A paper transit benefit (voucher or pass) must be returned to your Agency Contact

2. No personal travel is permitted!

Let's Do it!

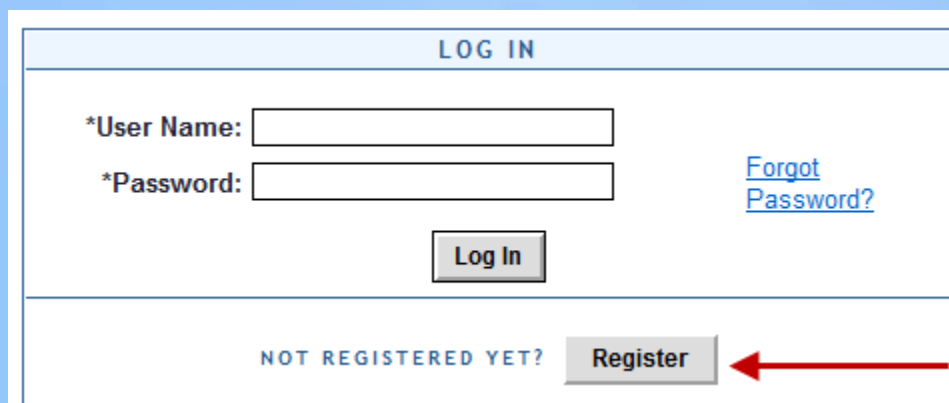
First Stop:

TRANServe.dot.gov

Second Stop:

Participants

3. Use your SBA federal email address to create a User Account Profile in the Transit Benefit Application System



LOG IN

*User Name:

*Password:

[Forgot Password?](#)

Log In

NOT REGISTERED YET? [Register](#)

REMEMBER: YOU ONLY NEED TO REGISTER THE FIRST TIME IN

ACCOUNT INFORMATION

* indicates required field.

*User Name:

*First Name:

Middle Name:

*Last Name:

*Agency/Mode:

Phone Number:

- Complete the registration form
- Use your SBA email address as your User Name
 - @sba.gov
- Click “Register”

NOTE: A temporary password will be emailed to you at your official SBA email address. When you receive the temporary password, please follow the Instructions beginning on the next page

5. Submit the Transit Benefit Program expense worksheet and application

- a. Type in your User Name and Password
- b. Click "Login"

LOG IN

* indicates required field.

*User Name: ←

*Password: ←

[Forgot Password?](#)

←

Welcome To Parking and Transit Benefit Public Website Version v 2.1.2



[Transit Benefit Application](#)



[Approval Section](#)



[My Account](#)



[Change Password](#)



[Log out](#)

CHANGE PASSWORD

*Current Password:

*Create New Password:

*Reenter New Password: ←

*Create a Hint:

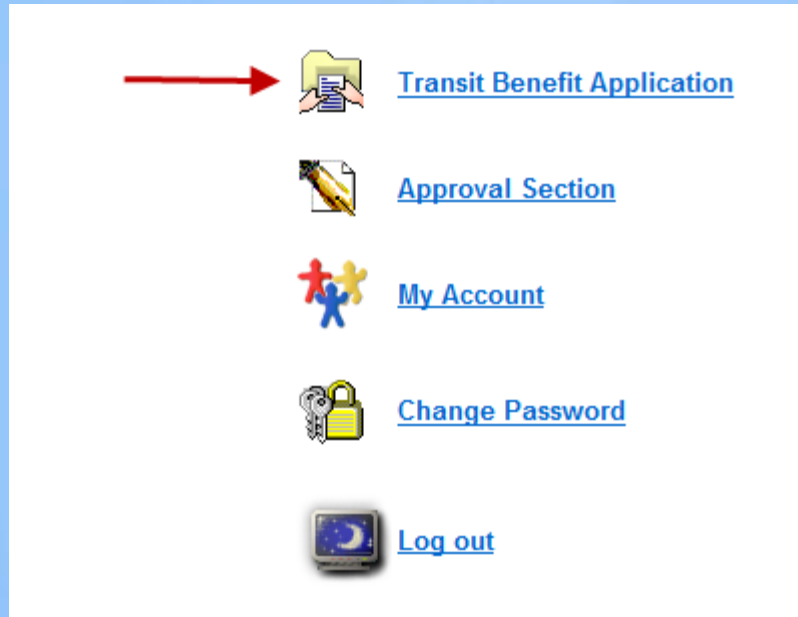
A hint is a meaningful personal association to help you remember your password. This is optional, but highly recommended.

- a. Complete the Change Password form
- b. Click “Submit”
 - i. “Password Changed!” will be displayed
- c. Click “Home” on the blue task bar to continue

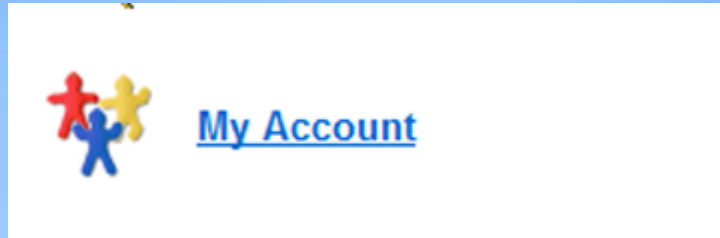


a. To:

- i. Apply, withdraw, request information or change existing information select:



- i. To update account information (Name, Username, Phone number, Email Address, etc.) select:



- ii. To Complete the Transit Benefit Application select:

SELECT AN ACTION TO CONTINUE

Employer: Consumer Product Safety Commission

Please make a selection

Request Information [?](#)

Certify/Enroll [?](#)

Continue

- i. Click **“Continue”**
- ii. Read the terms and conditions of the Transit Benefit Program :

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.

1. Common ID is **Enter Your Last Name**
2. **Work Zip**
3. **Work Number – Your direct telephone number**
4. **Point of Contact/Administrative officer –
Region/email address**

1. Common ID is: Your Last Name
2. Work Number – Your direct telephone number
3. Point of Contact – Receives TRANServe Card
 1. Open “Select”
 2. Choose for your Region

Follow these Steps to Submit the Transit Benefit worksheet and application:

- 1) Read the Plain Language Reminder and Calculation Instructions at the top of the Transit Benefit Application Worksheet.

TRANSIT BENEFIT APPLICATION WORKSHEET

All Transit Benefit Program Applicants are required to certify the "**Total Monthly Expense**" of their Home to Work Mass Transit 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**"

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

1) Complete the Expense Worksheet

- a. Specify the Reason for Certification using the drop down box
- b. Select your methods of mass transportation
- c. Select “Civilian/Military” from drop-down menu
- d. Select your work status from drop-down menu
- e. Enter ONE Transit Company Name per line
 - i. Do NOT enter Metro/VRE or any other combination
 - ii. Use the “other” field if you have an additional entry
- f. Enter either your daily or monthly commuting expenses
 - i. Use monthly only if you purchase a monthly pass
 - ii. Enter the number of days you routinely work in a month
 1. Do you RDO or telework?

Note: Repeat these steps for each method of Mass Transit you routinely use.

The Total Monthly Expense value automatically calculates and transfers to the Application.

* indicates required field.

→ *Reason for Certification: Annual Certification/Recertification ▼

→ I have completed the required Transit Benefit Integrity training for my Agency ?


*Select your transportation methods:

→ Bus Rail Other Method Vanpool

→ Civilian/Military: UNPAID INTERN ▼ Work Status: Full Time ▼

Method of Transportation		Daily Expense	Days per Month	Monthly Expense
Bus to Work	Name of Company BusName/ Flat Rate	\$ 5.02	14	\$ 70.23
Bus from Work	Name of Company Bus Name/ Flat Rate	\$ 5.02	14	\$ 70.23
Other Bus to Work	Name of Company Bus Name/ Intersection	\$ 2.75	14	\$ 38.50
Other Bus from Work	Name of Company Metro/ A46	\$ 2.35	14	\$ 32.90
Rail to Work	Name of Company VRE/ Burke	\$ 5.35	14	\$ 74.90
Rail from Work	Name of Company VRE/ Union Station	\$ 5.35	14	\$ 74.90
Other Method to Work: Subway	Name of Company WMATA/ New Carrollton	\$ 4.30	14	\$ 60.20
Other Method from Work: Subway	Name of Company WMATA/ Union Station	\$ 4.30	14	\$ 60.20
Van Pool	Name of Company Owner's Name	\$ 17.86	14	\$ 250.00
<p>All SBA Employees are required to include specifics, such as bus stop #, intersection and station name. See Examples above.</p>		<p>Total Monthly Expense: 732.06</p>		


Complete the Transit Benefit Program Application

(at any point, click  for additional information)

1. **Identifier: Last 4 of your Social**
2. **Work Phone:** Enter your Work Phone
3. **Common Identifier: Enter your Last Name**
4. **Agency/Mode:** SBA should autofill
5. **Region your region** (e.g. “DC”)
6. Enter work information
7. The full address to which you commute via mass transit
8. Enter residence information
 - a. The full address from which you commute via mass transit

Continued....

Complete the Transit Benefit Program Application

(at any point, click  for additional information)

9. First Approving Official: Geoffrey Suber

10. Point of Contact: Geoffrey Suber

11. Manager/Fund Certifier:


12. Manager Phone: The best number to reach your
Supervisor

13. SmarTrip® card number.

- a. Refer to the online help icon to identify the correct nine digit sequence required by Metro.
- b. All NCR SBA employees must have a SmarTrip® card

Continued....

Complete the Transit Benefit Program Application

(at any point, click  for additional information)

14. Comment for Agency Approvers:

- a. Enter any additional information that will assist in the approval process

15. Click “Submit Application”

- a. Look for this Notification at the top:

“Thank you for enrolling in the Transit Benefit Program”



**The Transit Benefit Office
is available to assist you**

Please email questions to:

Geoffrey.Suber@sba.gov

- 1) **Complete the Transit Benefit Application** – at any point, click
 - a. Identifier: Last 4 of your Social
 - b. Work Phone: Your direct telephone number
 - c. Common Identifier: “Last Name”
 - d. Agency/Mode: SBA
 - e. Region: That closest to where you work (e.g. DC)
 - f. Work: The full address to which you commute via mass transit
 - g. Residence: The full address from which you commute
 - h. Approving Official
 - i. Point of Contact: Geoffrey K. Suber
 - j. Agency Approver
 - k. Manager Phone: The best number to reach your Supervisor
 - l. SmarTrip number
 - m. Comment for Agency Approvers: Enter information to assist approval
 - n. Click: Submit Application

You will receive email notifications as your application progresses

