

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

TABLE OF CONTENTS

1.	OVE	RVIEW	1-1
	1.1	Background	1-1
	1.2	Purpose	1-1
	1.3	Document Organization	1-1
	1.4	Points of Contact	1-1
2.	ACC	ESSING THE TRANSIT BENEFIT APPLICATION	2-1
	2.1	Login Screen	2-1
	2.2	Change Password	2-3
	2.3	Password Recovery	2-4
	2.4	My Account	2-5
	2.5	Session Time Out	2-6
	2.6	Exit	2-6
3.	OVE	RVIEW OF THE HOME PAGE	3–1
	3.1	Transit Benefit Application	3–2
	3.1.	1 Request Information	3–2
	3.1.2	2 Withdraw from the Program	3–4
	3.1.	3 Address/SmarTrip® Change	3–6
	3.1.4	4 Certify/Enroll	3–7
	3.1.	5 Disapproved Applications	3–13
AI	PPEND	IX A: SMARTRIP CARD INSTRUCTIONS	A–1

Table of Figures

Figure 1: Transit Benefit Application Log In page	2-1
Figure 2: Register Account Information page	2-1
Figure 3: Completed Registration page	2-2
Figure 4: Registration Confirmation	2-2
Figure 5: Log In page	2-2
Figure 6: Change Password page	
Figure 7: Change Password Confirmation	2-3
Figure 8: Utilities Menu Options	2-4
Figure 9: Forgot Password page	2-4
Figure 10: Show Hint	2-4
Figure 11: Update My Account page	2-5
Figure 12: Update My Account Confirmation	2-5
Figure 13: Utilities Menu Options	2-6
Figure 14: Website Home page	3–1
Figure 15: Additional Menu Options	3–2
Figure 16: Select An Action To Continue page	3–2
Figure 17: Request Information page	3–3
Figure 18: Request Information Confirmation	3–3
Figure 19: Withdraw From The Program page	3–4
Figure 20: Supervisor (1 st Approver)	3–4
Figure 21: TBC Certifier (2 nd Approver)	3–5
Figure 22: Withdraw Confirmation	3–5
Figure 23: Change Address/ SmarTrip® page	3–6
Figure 24: Address/ SmarTrip® Confirmation	3–6
Figure 25: Warning page	3–7
Figure 26: Transit Benefit Application Worksheet	3–8
Figure 27: Bus Method	3–9
Figure 28: Other Bus Method	3–9
Figure 29: Rail Method	3–10
Figure 30: Other Method	3–10
Figure 31: Vanpool Method	3–10
Figure 32: Sample Agency Work Schedule Policies	3–10
Figure 33: Method of Transportation Table	3–10
Figure 34: 1 st Approver (Supervisor)	3–11
Figure 35: 2 nd Approver (TBC Certifier)	
Figure 36: Points of Contact	
Figure 37: Completed Transit Benefit Application	3–12
Figure 38: SmartBenefits® Program page	3–12
Figure 39: Transit Benefit Program Confirmation	3–13

Figure 40: Select An Action To Continue page	3–13
Figure 41: Warning page	3–14
Figure 42: Disapproved Transit Benefit Application Worksheet	3-15

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
 - <u>Underline Italic in blue</u> 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.

Contact	Name	Link	
Local TBC	TBC List	http://www.dm.usda.gov/employ/worklife/transit/index.htm	
НQ ТВС	TBC List	http://www.dm.usda.gov/employ/worklife/transit/index.htm	
Transit Program Office	Email	TransitSubsidyProgram@dm.usda.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.

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		
	WARNINGWARNING***		
	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	
	 You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system. 	~	
	WARNINGWARNING***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 Pase	sword?
	Not registered yet? Register	
	WARNINGWARNING***	
	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
	 You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system. 	~
	WARNINGWARNING****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-alphabetic characters (for example, I, \$,%) Password Witzprife 0 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.

Update My Accoun	t Information				
*User Name:	kimberly.j.gravestest@va.gov	1			
*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: Role:	(202) 555-4632 Applicant				
		Update	Cancel		

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

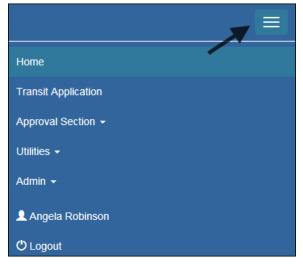


Figure 15: Additional Menu Options

3.1 Transit Benefit Application

The Transit Benefit Application option allows the applicant to request information, withdraw from the program, make address and SmarTrip[®] 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 Continue	
	Employer: Department of Transportation
	Request Information
	○ Withdraw from the Program 9
	○ Address/Smartrip Change 😔
	○ Certify/Enroll
	Continue
l	

Figure 16: Select An Action To Continue page

3.1.1 Request Information

The applicant can request information from the Agency POC by submitting questions regarding the transit benefit program.

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:					
	Click the Calendar to select a Withdrawal D	late			
*Approving Official: 🚱		Selec	ct		
	Click the Select button to select Approving	Official	_		
		Selec			
*Manager/Fund Certifier: 😗	Click the Select button to select Manager/F		pt		
	Olek the Oclect ballon to belet managem				
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 Supervisors.

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

Figure 20: Supervisor (1st Approver)

- d. Select your Supervisor.
- e. Click the **Select** button to display the list for your agency's TBC Certifiers.

Mana	ager/Fund Certifier					×
	Name				Email	
	Type to filter					
C	GLEN HARPERTEST				glen.harpertest@va.g	ov
C	JESSICA MARTIN				jessica.martins@va.g	ov
		<<	< 1	>	>>	
						Close

Figure 21: TBC Certifier (2nd Approver)

- f. Select your TBC Certifier.
- 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 this form to update an Address or SmarTrip® number ONLY.

- 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 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						
Thereas determining requirements are required to certify 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".	ATTAL MARK.					
Instructions: To calculate your "Total Month	ily Expense"						
a. Select your transportation method(s)							
 Enter the following information in the Name of Company for your me	"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	~					
C 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:							
 If you work a Flex Schedule of 9-hour 	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					
 If you telecommute or work part time, 	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						
	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
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Other Bus to Work:		\$		\$
	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
ry Transit Benefit Program Participa			Total Monthly Expens	

Figure 27: Bus Method

• Other Bus

	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

Figure 28: Other Bus Method

Rail

Rail to Work:		\$		s
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Rail from Work:		\$		\$
	Name of Company	Daily Expense	Days per Month	Monthly Expense
y Transit Benefit Program Participa			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		S
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Every Transit Benefit Program Participa month to reflect the actual cost of their		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: • 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 • If you work a Fiex Schedule of 9-hours per day, the average amount of 18 Days can be entered into the Days per Month column • 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 • 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 • 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 • 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	
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 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 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	Always follow your Agency work schedule policy for specific guidance on the Days per Month entry.
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 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	Defined work schedule examples:
	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 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

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 is last four digits of your social security number.
- g. Enter the Common Identifier. This is information used to activate the TRANServe Card. The card activation key is your last name + last four digits of your social security number.
- h. Select the Region closest to your physical work location (DC metro area is always "DC"); otherwise check with your TBC/POC.
- i. Select the Agency/Office.

- j. Enter your Work Information.
- k. Enter your Residence Information. (The address from which you routinely commute)
- 1. Click the **Select** button to display the list for your agency's Supervisors.

harry.carey@treas.gov
< 1 > >>

Figure 34: Supervisor (1st Approver)

- m. Select your Supervisor. (Check the help menu to clarify)
- n. Click the **Select** button to display the list for your agency's TBC Certifier. (Check the help menu to clarify)

	Name					Emai	I	
	Type to filter							
3	DARREN CHANG					darre	n.chang@ed.gov	(
3	HARRY CAREY					harry.	.carey@treas.go	v
		<<	<	1	>	>>		

Figure 35: TBC Certifier (2nd Approver)

- o. Select your TBC Certifier.
- p. Click the **Select** button to display the list for your agency's Points of Contact.

	Region	Email
	•	
	DC	POC@Agency.gov
<< <	1 > >>	
		Clo
	<< <	

Figure 36: Points of Contact

q. Select your Point of Contact.

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

*Identifier: 😜					
	RODRIGUEZ	KAREN		LYNN LEE	
Name:	(Last)	(First)		(Middle)	
Email Address:	Karen.rodrigueztest@treas.gov		"Work Phone: 😏	(202) 555-7764	
"Common Identifier: 😒	HELLOKITTY				
Department of Treasury					
*Select Your Agency: 0	TRE-HQ		*Region: 🕥	DC	
*Admin: 😔	TREASURY		~		
	Populates from Select Your Agency				
Accounting Code: 9			Select		
	Click the Select button to select Accounting	ng Code			
Routing Symbol: ()			Select		
	Click the Select button to select Routing 5	Symbol			
Location/Building: 0			Select		
	Click the Select button to select Location	Building			
	I certify that my usual monthly Transit or 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	
Work Information					
"Work Address:	123 TEST STREET				
"Work City:	WASHINGTON	"Work State:		"Work Zip: 20590	
"Work City:	WASHINGTON	"Work State:	bc 🗸	-Work Zip: 20090	
Residence Information					
	505 GAYLEY AVENUE				
*Address:					
*Address:					
*Address:	Address 2				
"Address: "City:		*State:	CA V	*Zip: 90024	
*City:	Address 2	*State:	CA V	*Zip: 90024	
"City: Approver Information	Address 2	*State:	CA V		Sele
*City:	Address 2	*State:		*Zip: 90024 CHANG, DARREN Cilck the Select button to	
"City: Approver Information	Address 2 LOS ANGELES CAREY, HARRY Science 1	*State:		CHANG, DARREN	
"City: Approver Information	Address 2 LOS ANGELES CAREY, HARRY Science Cick the Select button to select	*State:		CHANG, DARREN Click the Select button to	
-City: Approver Information *Approving Official: @	Address 2 LOB ANGELES CAREY, HARRY Sorect Cick the Select builton to select Approving Official TREASURY POO Select Cick the Select builton to select Point of	*State:	*Manager/Fund Certifier: 🛛	CHANG, DARREN Click the Select button to	
"City: Approver Information "Approving Official: @	Address 2 LOS ANDELES CAREY, HARRY Select CAREY HARRY Select Approving Official TREADURY POC Select	"State:	*Manager/Fund Certifier: 🛛	CHANG, DARREN Click the Select button to	
"City: Approver Information "Approving Official: @	Address 2 LOB ANGELES CAREY, HARRY Sorect Cick the Select builton to select Approving Official TREASURY POO Select Cick the Select builton to select Point of	*State:	*Manager/Fund Certifier: 🛛	CHANG, DARREN Click the Select button to	
Cty: Approver Information "Approving Official: @ "Point of Contact: @	Address 2 LOS ANGELES CAREY, HARRY Select Lation to select Approving Official TREASUP PROC Select. CREAS the Select builton to select Point of Contact	*State:	*Manager/Fund Certifier: 🛛	CHANG, DARREN Click the Select button to	
"City: Approver Information "Approving Official: @ "Point of Contact: @ "SmartTrip Card Number: @	Address 2 LOS ANGELS CAREY, HARRY Select CAREY, HARRY Select Cick the Select button to select Approving Official TREAMURY PRO Select Cick the Select button to select Point of Contact E00123456 HELP ME HELP YOU	*State:	*Manager/Fund Certifier: 🛛	CHANG, DARREN Click the Select button to	
"City: Approver Information "Approving Official: @ "Point of Contact: @ "SmartTrip Card Number: @	Address 2 LOS ANGELES CAREY, HARRY Beect Citack the Select button to select Approving Official TREABURY PRO Select button to select Point of Contact S00122456	*Sale:	*Manager/Fund Certifier: 🛛	CHANG, DARREN Click the Select button to	Select
"City: Approver Information "Approving Official: @ "Point of Contact: @ "SmartTrip Card Number: @	Address 2 LOS ANGELS CAREY, HARRY Select CAREY, HARRY Select Cick the Select button to select Approving Official TREAMURY PRO Select Cick the Select button to select Point of Contact E00123456 HELP ME HELP YOU	*Sale:	*Manager/Fund Certifier: 🛛	CHANG, DARREN Click the Select button to	

Figure 37: Completed Transit Benefit Application

t. Click the **Continue** button. The SmartBenefits_® Program page is displayed.



Figure 38: SmartBenefits® Program page

- u. 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®)
- v. 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.

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

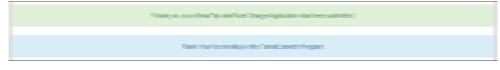


Figure 39: Transit Benefit Program Confirmation

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	

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.

Note: *The SmartBenefits*_® *program confirmation message is only displayed when the applicant enrolls in the SmartBenefits*_® *program.*



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.

	Dekte Applic	ation and Start Over			
	Disapprov	ed Reason: trace			
ndicates required field.					
Certify/Enroll Status: Certificat	lion Disapproved				
C Transit Benefit Application Worksh	eet				
All Transit Benefit Program Applicants are n		ment of their idease in black black	a Transil Comm	10	
Parking fees are not eligible for the trans			o Transe Gorinia	<u>au</u> .	
Instructions: To calculate your "Total Month	hly Expense*				
a. Select your transportation method(s)	"To Work" and "From Work" row(s) of each	transportation methods			
 Enter the knowing intermation in the i. Name of Company for your me ii. Daily or Monthly Expense 	thod of transportation (Metro, BART, Subv	ay)			
 Number of days you routinely v If you purchase a Monthly pass, divid 	vork in a month e the price of the pass by 2, and enter the somatically populates	information in the Monthly Exper	se column.		
d. The Total Monthly Expense value aut Reason for Certification:	Rate Change			~	
	CIVILIAN			~	
Civilian Military: O Work Status:	FullTime			ž	
work status:	FullTime			v	
G Transit Benefit Transportation Meth	nods				
Always follow your Agency work schedule p	olicy for specific guidance on the Days per	Month entry.			
Defined work schedule examples:	er en de like evenen erevel of 20 Day	s are by entered into the Dave of	a blogik colores		
 If you work a sask schedule of s-hou If you work a Flex Schedule of 9-hour If you work a Compressed schedule of 	is per day, the average amount of 20 Day is per day, the average amount of 18 Days of 10-hour days, the average amount of 16	can be entered into the Days p can be entered into the Days pe Days can be entered into the Da	r Month column ys per Month col	ume	
 If you telecommute or work part time, 	enter the number of days you actually con	nmute to/from work.			
	"Select your tra Bus Other Bus Ra	insportation methods: II Other Method Vanpool			
		a care series raspes			
Bus to Work:	BTW	\$ 4.50	15		\$ 72.00
	Name of Company	Daily Expense	Days per Mo	nth	Monthly Expense
Bus from Work:	BFW	\$ 4.50	16		\$ 72.00
Bus note work.	Name of Company	Daily Expense	Days per Mo	nth	Monthly Expense
Every Transit Benefit Program Participar month to reflect the actual cost of their h	It is responsible to adjust the amount of one to work commute	their transit benefit each	Total Mon	thly Expense:	\$ 144.00
G Transit Benefit Program Application	1				
		d Reason: trace			
'identifier: O	Disapprove	d Reason: trace			
"identifier: O Name:	TESTON	TRACEY			
Name:	TESTON (Last)	TRACEY (First)			1
Name: Email Address:	TESTON (Last) Tracey.Teston@itkc.gov	TRACEY (First)	Work Phone: 0	(410) 555-40	54
Name: Email Address: "Correnon Identifier: @	 TESTON (L.35) Tracey.Teston@Sisc.gov 34550/ED	TRACEY (First)	Work Phone: 0	(410) 555-40	54
Name: Email Address: "Common Identifier: @ Federal Deposit Insurance Corporatio	TESTON (L.33) Tracey Testongtisc pov (3-030/10)	TRACEY (First)			54
Name: Email Address: "Correnon Identifier: @	 TESTON (L.35) Tracey.Teston@Sisc.gov 34550/ED	TRACEY (First)	Work Phone: 🛛	(410) 555-40 DC	54
Name: Email Address: "Common Identifier: @ Federal Deposit Insurance Corporatio	TESTON (L.33) Tracey Testongtisc pov (3-030/10)	TRACEY (First)			54
Name: Enail Address: "Ceremon Identifier: @ Federal Deposit Insurance Corporatio "Select Your Agency: @	TESTON (LIST) Textep:Testonĝišk.gov (SOSOTED a Troc V	TRACEY (First)	"Region: 😡		54
Name Enter Adverse: "Cannon institute" () Federal Deposit Insurance Corporato "statet Thar Agines: () "Advers: ()		TRACEY (First)	"Region: 😡		54
Name: Enail Address: "Ceremon Identifier: @ Federal Deposit Insurance Corporatio "Select Your Agency: @		TRACEY (PIS)	"Region: 😡		54
Name Enter Adverse: "Cannon institute" () Federal Deposit Insurance Corporato "statet Thar Agines: () "Advers: ()	TESTON (LED) (LED) (LED) (LED) (LED) (DC) (DC) (DC) (DC) (DC) (DC) (DC) (D	THACEY (THR)	"Region: 😡		
Name Enter Adverse: "Cannon institute" () Federal Deposit Insurance Corporato "statet Thar Agines: () "Advers: ()	TESTON (Las) Take; Felongfilt: gov CoCo CoCo CoCo CoCo CoCo CoCo CoCo C	THACEY (Tas)	*Ragion: ₽ ▼	DC \$ 144.00	
Name Enter Adverse: "Cannon institute" () Federal Deposit Insurance Corporato "statet Thar Agines; () "Advers: ()	TESTON (Last) Takes: Foldering State (Last) Takes: Foldering Takes: Fo	THACEY ("trag)	*flagion: •	DC § 144.00 By understand I	will be responsible for
nerre Enter Andress: "cannens institute: @ "Anters Tour Agence? @ "Anters Tour Agence? @ "Anters Tour Agence?	TESTON (Las) Take; Felongfilt: gov CoCo CoCo CoCo CoCo CoCo CoCo CoCo C	THACEY ("trag)	*flagion: •	DC § 144.00 By understand I	will be responsible for
werr Crant and answer "cranter of the answer of the answer "start Ther Agence" "data: "O Accounting Costs: "O Work Information	TSISTON LIUT TSISTON LIUT TSISTON LIUT TSISTON SIGUET SUB- SIGUET	THACEY ("trag)	*flagion: •	DC § 144.00 By understand I	will be responsible for
nerre Enter Andress: "cannens institute: @ "Anters Tour Agence? @ "Anters Tour Agence? @ "Anters Tour Agence?	TESTON (Last) Takes: Foldering State (Last) Takes: Foldering Takes: Fo	TRACEY (*TS)	*flagion: •	DC § 144.00 By understand I	will be responsible for a
werr Crant and answer "cranter of the answer of the answer "start Ther Agence" "data: "O Accounting Costs: "O Work Information	TSISTON LIUT TSISTON LIUT TSISTON LIUT TSISTON SIGUET SUB- SIGUET	THACEY ("trag)	*flagion: •	DC § 144.00 By understand I	will be responsible for
were Canar Adamses Canaron Internets Anternet Adamse of Adamse of Mark Information	Tion Takes Feedongtike gav Takes Take	TRACEY (*TS)	*flagion: •	DC \$ 144.00 Wy understand 1 nory tax free tim	will be responsible for a
Ren: Crant Advents: Cranter of Cranter of Cranter Advent Terr Agence of Advent Terr Agence of Adventing Cranter Work Information	Tion Takes Feedongtike gav Takes Take	TRACEY (*TS)	*flagion: •	DC \$ 144.00 Wy understand 1 nory tax free tim	will be responsible for a
were Cannon beauting Cannon beauting Petersol Deposit harmannes Corporation Adams of Adams of Adams of Cannon State Work Information Work Information	TIGO TO	TRACEY (*TS)	*flagion: •	DC \$ 144.00 Wy understand 1 nory tax free tim	will be responsible for a
wer: Endersteine Conservence Corporation (Conservence Corporation (Conservence Corporation (Conservence Conservence) (Conservence Conservence) (Conse	TESTON (Las) Taker, Folding fat, gov Lotional and the second sec	THACEY ("trop) Inty Code answerding costs are Q reserved to exceed the car exceeded the carried \$10 bit to be muting benefit to exceed the car Yourk Base	*flagion: •	DC 3 144 00 By understand I dory tax free lim "Week Zip:	will be responsible for a.
were Cannon beauting Cannon beauting Petersol Deposit harmannes Corporation Adams of Adams of Adams of Cannon State Work Information Work Information	TIGO TO	TRACEY (*TS)	*flagion: •	DC \$ 144.00 Wy understand 1 nory tax free tim	will be responsible for a
wer: Endersteine Commensioner Commensione	TESTON (Las) Taker, Folding fat, gov Lotional and the second sec	THACEY ("trop) Inty Code answerding costs are Q reserved to exceed the car exceeded the carried \$10 bit to be muting benefit to exceed the car Yourk Base	*flagion: •	DC 3 144 00 By understand I dory tax free lim "Week Zip:	will be responsible for a.
wer Canner steamer Canner steamer Canner Canner steamer Canner C	TSTON LIUT TSTON LIUT TGC TGC TGC TGC TGC TGC TGC TGC TGC TG	TRACEY (Trac) (Trac) Ing Code are above for control in the lar endowed by control in the lar endowed by control in the lar endowed by control in the lar waves there: 0 void the code waves there is a second to be code waves the second to be code waves to be code waves the second to be code waves to be code wa	*flagion: •	0 C 3 144.00 40 yudesstand 40 yudesstand "Wenk Ziju: 20 yudesstand "Zigu: 20 yudesstand	uil be responsite for a. 1367
Werk information Work information Work information Work information Work information	TESTON (LIST) Takery Folding Size (LIST) Takery Folding Size (LIST) Takery Folding Size (COC) Takery Folding Size (COC) Takery Folding Size (COC) Cake the Side(C) Your Agency Cake the Side(TRACEY (Trac) (Trac) Ing Code are above for control in the lar endowed by control in the lar endowed by control in the lar endowed by control in the lar waves there: 0 void the code waves there is a second to be code waves the second to be code waves to be code waves the second to be code waves to be code wa	Tagins 0	0 C 5 144.00 40 yudestand 40 yudestand "Went Zy:	with be responsible for a table of the second
Exercise Sector		TRACEY (Trop)	Theyion: ()	00 5 144.00 49 understand 1 9 work.29: 	with be responsible for a SIGAR SI
Werk information Work information Work information Work information Work information		TRACEY (Trop)	Tagins 0	00 5 144.00 49 understand 1 9 work.29: 	with be responsible for a SIGAR SI
Exercise Sector		TRACEY (Trop)	Theyion: ()	00 5 144.00 49 understand 1 9 work.29: 	with be responsible for a SIGAR SI
Exer Control of Contro		TRACEY (Trop)	Theyion: ()	00 5 144.00 49 understand 1 9 work.29: 	with be responsible for a SIGAR SI
Exercise Sector		TRACEY (Trop)	Theyion: ()	00 5 144.00 49 understand 1 9 work.29: 	with be responsible for a SIGAR SI
Exer Control of Contro		TRACEY (Trop)	Theyion: ()	00 5 144.00 49 understand 1 9 work.29: 	with be responsible for a SIGAR SI
Eard Enderson Enderso		TRACEY (Trop)	Theyion: ()	00 5 144.00 49 understand 1 9 work.29: 	with be responsible for a SIGAR SI

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 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.