



United States Department of Transportation

**SSA TRANSIT BENEFIT PROGRAM
TRANServe Electronic APPLICATION
APPLICANT USER GUIDE**

Submitted by

TRANServe

A division of the

Office of the Secretary of Transportation

U.S. Department of Transportation

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1. OVERVIEW

1.1 Background

The Department of Transportation, Transportation Services Division (TRANServe), administers the Transit Benefit program. This system will serve as the publicly accessible interface for managing Transit benefits. TRANServe Services include purchasing and distributing transit fare media through the TRANServe Debit Card via Economy Act agreements and the authority of the Administrative Working Capital Fund (49 U.S.C. 327). The office currently supports 276 Agencies and sub-divisions, providing timely and efficient transit benefit service to over 200,000 customers, 60,000 of who use the online Transit Application.

TRANServe has redesigned the current Transit WebApplication into a “new” user friendly, mobile site designed specifically for mobile devices. The mobile version of the WebApplication has been optimized for smaller screens found on mobile phones and tablets. This will allow federal government workers to apply for the transit benefit, request information, withdraw from the program and recertify using a mobile device. Further, TRANServe TBMs, Admins, first, second, and third level approvers will be able to view, update, approve, or disapprove applications from a mobile device from anywhere and at any time.

1.2 Purpose

The Transit Benefit Application user guide is designed to provide written instruction on how to use the application effectively and efficiently.

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

2. ACCESSING THE TRANSIT BENEFIT APPLICATION

Follow the below steps to navigate to the Login/Register page

1. Open an Internet Browser
2. Enter the URL: www.transportation.gov/transerve.
3. Click the [Participants](#) link and scroll down and select your Agency.
4. Click the [New Employee Orientation](#) link. (Follow the instructions to complete the Transit Benefit Integrity Awareness Training. Print (or print to .pdf) two copies of the Completion Certificate and give one to your Supervisor. **Note:** *Ensure your Supervisor emails your certificate to [Regional Transit Coordinator](#) and identifies you as a New SSA program participant.*
5. Click the [Participants](#) link and scroll down to select your Agency (SSA).
6. Select [Transit Benefit Program Application System](#) link.

2.1 Login and Registration

Use the following steps to access the application:

1. Enter the URL:
<http://transitapp.ost.dot.gov>. The Transit Application login page is displayed.

Figure 1: Transit Application Log In page First

First-time users will need to register. Use the following steps to register a username:

2. Click the **Register** button. The Register Account Information page is displayed.
3. Enter your government issued email address in the User Name textbox.
4. Complete the registration form.
Note: ** indicates required field.*

Note: *The agency used in the email (SSA) for the username will determine the agencies displayed in the Agency dropdown list.*

Figure 2: Register Account Information page

5. Click the **Register** button.

Figure 3: Completed Registration page

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

Figure 4: Registration Confirmation

After the participant has registered an email will be sent containing a temporary password. Retrieve the password and log into the application using the following steps:

7. Enter the username in the User Name textbox.
8. Enter the retrieved password in the Password textbox.
9. Click the **Log In** button.
10. The Change Password page displays.

Figure 5: Login page

2.2 Change Password

After logging into the application for the first time, it is required that you change the password to something that you will easily remember. Use the following steps to change your password:

1. Enter the retrieved password in the Current Password textbox.
2. Enter your new password in the Create New Password textbox.
3. Reenter your new password in the Confirm New Password textbox.
4. Enter a hint, something that will remind you of your password in the Create a Hint textbox.
5. Click the **Submit** button.

Note: * indicates required field.

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.

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

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.

Figure 6: Change Password page

Figure 7: Change Password Confirmation

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.

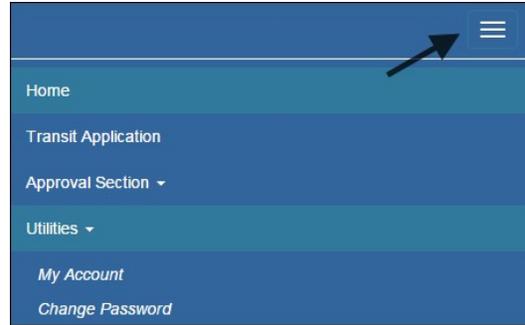


Figure 8: Utilities Menu Options

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.
2. The Show Hint section allows the user to view the Hint entered when the password was 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.
3. The Send It By Email section allows the user to retrieve a temporary password through email. The password will be sent to the email address entered when the account was created. Enter your username and click the **Submit** button.

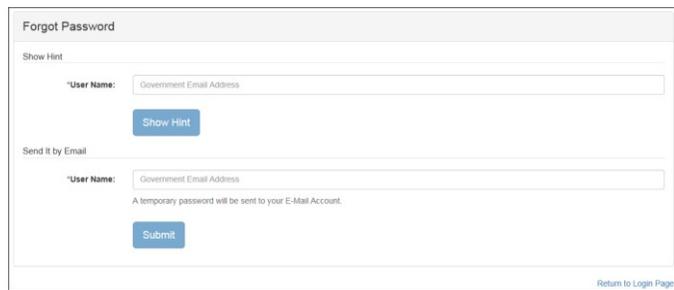


Figure 9: Forgot Password page redisplayed with the



Figure 10: Show Hint

The Login page displays. Enter the username and the retrieved password. Follow the instructions in **Section 2.2 Change Password** to change the password.

Note: * indicates required field.

2.4 My Account

The My Account page allows the user to update personal information.

Use the following steps to update your personal information:

1. From the Home page; click the **My Account** button. The Update My Account Information page displays. The information entered when the account was registered is pre-populated in the fields. Update the information as needed.
2. Click the **Update** button. The modified account information is saved and the Home page is displayed with a confirmation message at the top of the page.

Figure 11: Update My Account page

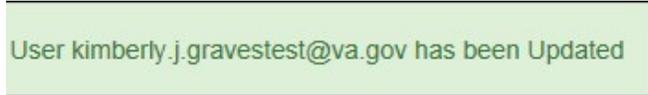


Figure 12: Update My Account Confirmation

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.

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.

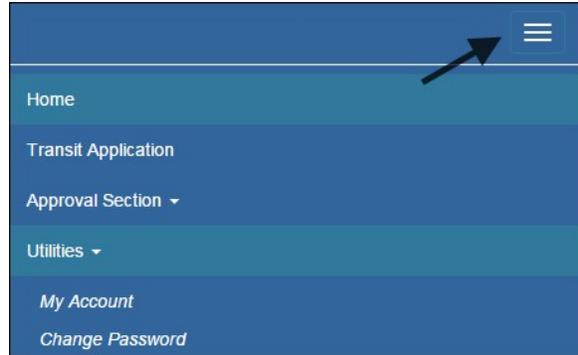


Figure 13: Utilities Menu Options

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 PTBW 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 PTB PUBLIC WEBSITE HOME PAGE

The tabs and links available to you on the PTB Public Website home page are determined by your assigned user role. User roles are assigned by the system administrator.

The Transit Benefit Public Website 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 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.
 - 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 Update My Account Information page. □ Change Password – Click this button to display the Change Password page.
 - Agency Reports – This functionality is only displayed when assigned by an administrator. Click this button to display the Agency Reports page.

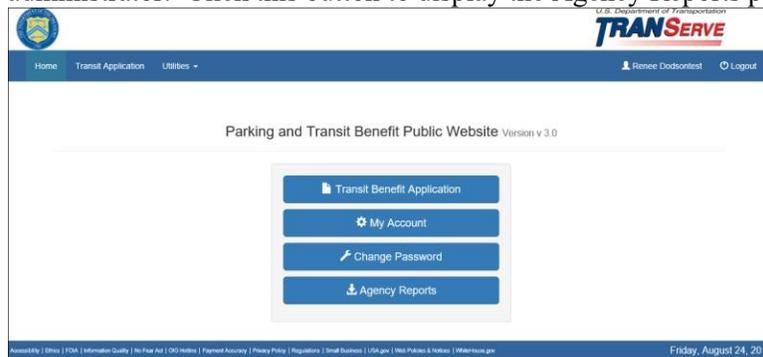


Figure 14: PTB Public Website Home page

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.

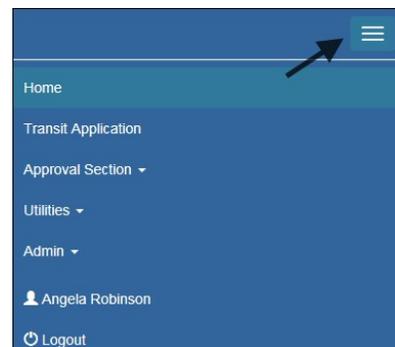


Figure 15: Additional Menu Options

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, certify/enroll in the transit benefit program, and submit monthly certifications.

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

Note: The Request Information radio button is selected by default.

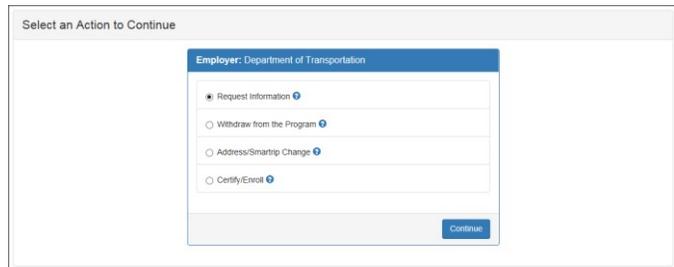


Figure 16: Select an Action to Continue page

3.1.1 Request Information

SSA employees should submit policy or guidance questions directly to their Regional Transit Coordinator via Outlook email. Application status information is available upon signing into the system. Only The Request Information option allows the applicant to request information from the Agency Program Office by submitting questions regarding the transit benefit program or a submitted application through the POC/Manager/Approver 2. Use the following steps to request information:

1. From the Select an Action to Continue page; click the **Continue** button to display the Request Information page.
2. If a POC/Manager/Approver 2 has been selected it will pre-populate in the Point of Contact textbox. To select a POC/Manager/Approver 2, click the **Select** button to display the available POC/Manager/Approver 2 in a separate window.
3. Select a POC/Manager/Approver 2 from the list.
4. Enter the question or concern in the Question textbox and click the **Send Request** button. An email is sent to the selected POC/Manager/Approver 2. The Home page is displayed with a confirmation message at the top of the page.

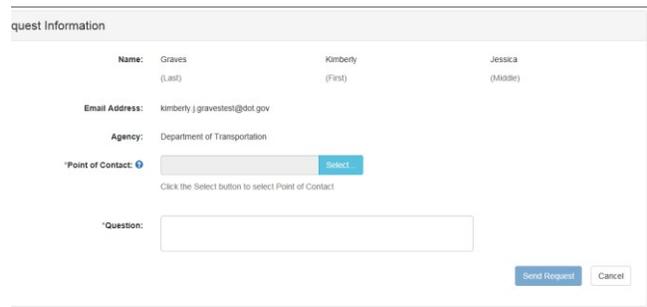


Figure 17: Request Information page

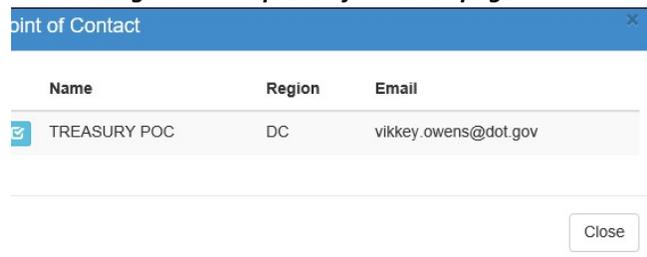


Figure 18: Point of Contact



Figure 19: Request Information Confirmation

3.1.2 Withdraw from the Program

The Withdraw from the Program option allows the applicant to submit a request to withdraw from the program at any time. Use the following steps to withdraw from the program:

1. From the Select an Action to Continue page; click the Withdraw from the Program radio button.
2. Click the **Continue** button. The Withdraw from the Program page is displayed.
3. Click the pop up calendar to select a withdrawal date.

Figure 20: Withdraw from the Program page

4. Click the **Select** button to display the list for your agency's Supervisors (1st Approvers/Supervisors). SSA employees will only see the Supervisor field label.
5. Select your Supervisor (1st Approvers).

Name	Email
KIM LYONS	kim.lyonstest@va.gov

Figure 21: Approving Official (1st Approver)

6. Click the **Select** button to display the list for your agency’s Managers/ (2nd Approvers). SSA employees will only see the Manager field label.
7. Select your Manager (2nd Approver).

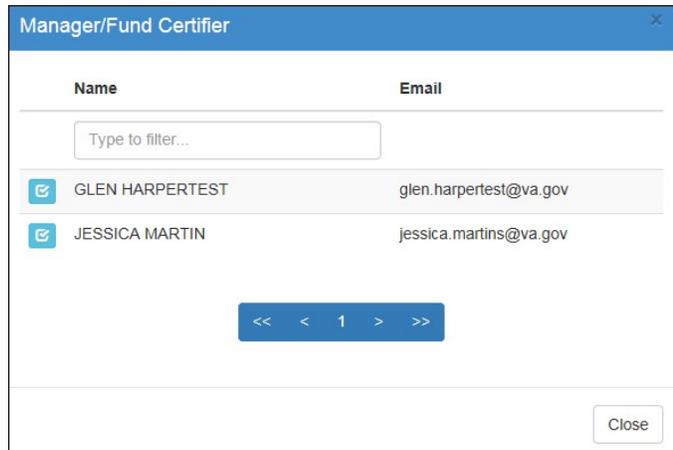


Figure 22: Manager (2nd Approver)

8. Enter any information that will assist your Agency Approver with processing your application in the Comment for Agency Approvers textbox.

Note: *The Comment for Agency Approvers must be used to show temporary assignment/employment start and end dates.*

9. Click the **Withdraw** button. The request is sent to TRANServe for processing and a confirmation message is displayed at the top of the



Figure 23: Withdraw Confirmation page.

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.*

Note: *If the approval functionality has been disabled by the agency the approval fields will not be displayed and the application is sent directly to TRANServe for processing.*

3.1.3 Address/SmarTrip® Change

The Address/SmarTrip® Change option allows the applicant to submit a request to update an address, work phone number, or SmarTrip® card number. Use the following steps to submit a request for an address/SmarTrip® number change:

1. From the Select an Action to Continue page; click the Address/SmarTrip® Change radio button.
2. Click the **Continue** button. The Address/SmarTrip® Change page is displayed.
3. Update the applicable information. **Only update the section that needs to be changed.**

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. Only participants who work in the NCR have SmarTrip cards (See the *Help Menu for more information).*

Figure 24: Address/SmarTrip® Change page

4. Click the **Submit** button. The request is sent to TRANServe for processing and a confirmation message is displayed at the top of the page.

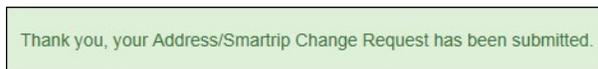


Figure 25: Address/SmarTrip® Confirmation top of

3.1.4 Certify/Enroll

The Certify/Enroll option allows the applicant to enroll in the transit benefit program by submitting an application. Use the following steps to certify/enroll in the Transit Benefit Program:

1. From the Select an Action to Continue page; click the Certify/Enroll radio button.
2. Click the **Continue** button. The Warning page is displayed.
3. 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.*

4. Select the reason for certification (See *Help menu and SSA policy for more information).

- Address or SmarTrip® Card Number Change – This selection is only used to make updates to your address or SmarTrip® card number. Do not select this reason if changing transportation amounts.
- Agency Change
- Annual Certification/Recertification
- New Transit Benefit Participant**
- Rate Change
- Vendor and Rate Change

5. Select your **Employment Type (Choose only Permanent, Temporary, or detail).**

6. Select your work status.

- Full Time
- Part time
- Intern (SSA employees do not select this option)

Note: * indicates required field.

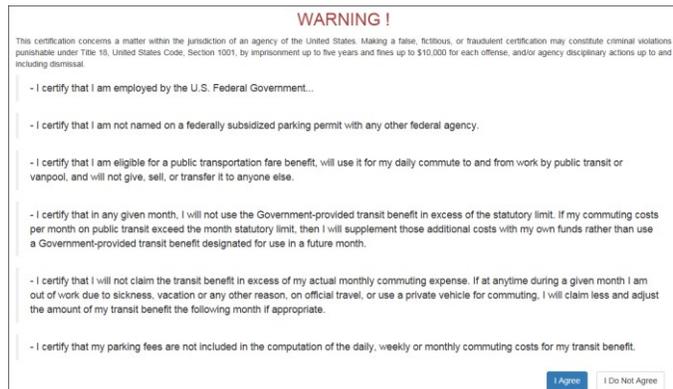
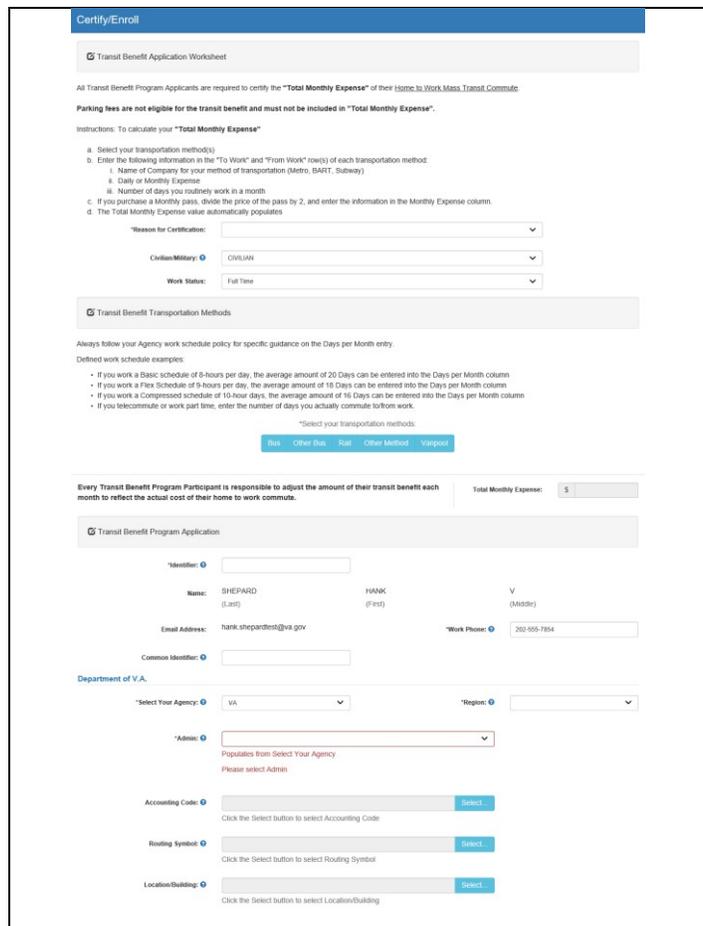


Figure 26: Warning page



Transit Benefit Program Applicant Guide

Note: SSA requires applicants and approvers to complete integrity training. Applicants click on the checkbox to confirm completion when submitting the Annual Certification/Recertification or New Transit Benefit Participant reasons application.

Office of the Secretary of Transportation

I certify that my usual monthly Transit commuting costs are: \$

This field is automatically calculated

Work Information

*Work Address:

*Work Zip:

*Work City: *Work State:

Residence Information

*Address:

Address 2:

*Zip:

*City: *State:

Approver Information

*Approving Official: Select

Click the Select button to select Approving Official

*Manager/Fund Certifier: Select

Click the Select button to select Manager/Fund Certifier

*Point of Contact: Select

Click the Select button to select Point of Contact

Manager Phone:

*SmartFrip Card Number:

Comment for Agency Approvers:

You have 1995 characters remaining

Continue Cancel

Figure 27: Transit Benefit Application Worksheet

7. Select your transportation method(s).

Bus

Bus to Work: \$ Days per Month Monthly Expense

Name of Company Daily Expense Days per Month Monthly Expense

Bus from Work: \$ Days per Month Monthly Expense

Name of Company Daily Expense Days per Month Monthly Expense

Other Bus to Work: \$ Days per Month Monthly Expense

Name of Company Daily Expense Days per Month Monthly Expense

Other Bus from Work: \$ Days per Month Monthly Expense

Name of Company Daily Expense Days per Month Monthly Expense

Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute. Total Monthly Expense: \$ 0.00

Figure 28: Bus Method

Other Bus

Other Bus to Work: \$ Days per Month Monthly Expense

Name of Company Daily Expense Days per Month Monthly Expense

Other Bus from Work: \$ Days per Month Monthly Expense

Name of Company Daily Expense Days per Month Monthly Expense

Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute. Total Monthly Expense: \$ 0.00

Figure 29: Other Bus Method

Rail

Rail to Work: \$ Days per Month Monthly Expense

Name of Company Daily Expense Days per Month Monthly Expense

Rail from Work: \$ Days per Month Monthly Expense

Name of Company Daily Expense Days per Month Monthly Expense

Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute. Total Monthly Expense: \$ 0.00

Figure 30: Rail Method

Other Method

together. SSA does not issue subsidies for parking.

Note: If all of the methods of transportation are selected, all of the methods will display in one table.

Figure 31: Other Method

Vanpool:		\$	\$
Name of Company	Daily Expense	Days per Month	Monthly Expense
Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.			Total Monthly Expense: \$ 0.00
Parking:		\$	\$
Name of Company	Daily Expense	Days per Month	Monthly Expense
Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.			Total Monthly Expense: \$ 0.00

Figure 32: Vanpool Method

Vanpool

Note: When filling out the method of transportation table, be sure to follow SSA work schedule policies, and covered modes of transportation. SSA does not a subsidy for parking or any other indirect costs. Employees cannot participate in the program while being named on a SSA parking permit.

10. Enter the Employee Common Identifier (ECI). This field is used to uniquely identify the applicant.

Note: See the *Help Menu for more information on how to locate your ECI.

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 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
- If you telecommute or work part time, enter the number of days you actually commute to/from work.

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

Figure 34: Sample Agency Work Schedule Policies

Rail to Work:	BTW	\$ 3.20	16	\$ 51.20
Name of Company	Daily Expense	Days per Month	Monthly Expense	
Rail from Work:	BFW	\$ 3.20	16	\$ 51.20
Name of Company	Daily Expense	Days per Month	Monthly Expense	
Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.			Total Monthly Expense: \$ 102.40	

Figure 35: 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.

9. If the Monthly Expense exceeds the current MTSP or NCR limit, radio buttons will be displayed. SSA policy requires pay out-of-pocket for costs exceeding applicable MTSP or NCR maximum benefit amounts.

acknowledge my commuting costs are above the current \$130.00 tax free limit and fully understand I will be responsible for aying taxes on the amount I use that exceeds the current tax free limit.
 do not want my monthly funded commuting benefit to exceed the current Transit statutory tax free limit.

Transit Statutory Limit Radio Buttons

11. Select your Region.

- 12. Select your RTC.
- 13. These fields will not display on SSA applications: Accounting Code, Routing Symbol, and Location/Building.

The screenshot shows three dropdown menus stacked vertically. Each menu has a label on the left, a search icon, a text input field, and a 'Select...' button on the right. Below each menu is a small instruction: 'Click the Select button to select [field name]'. The fields are Accounting Code, Routing Symbol, and Location/Building.

- 14. Enter your Work Information (See the *Help Menu for more information).
- 15. Enter your Residence Information (See the *Help Menu for more information).
- 16. Click the **Select** button to display the list for your agency's Supervisors (1st Approver).
- 17. Select your Supervisor (1st Approver).

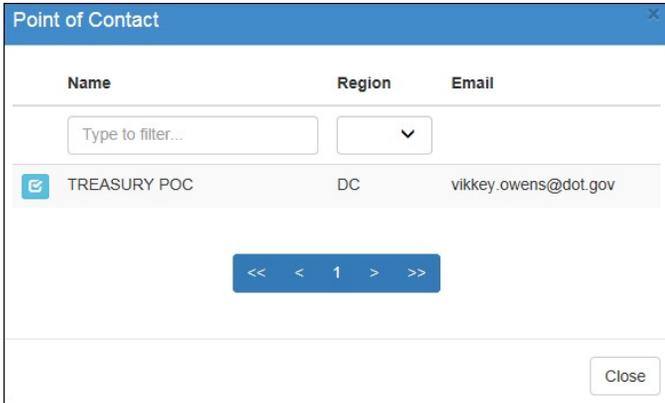
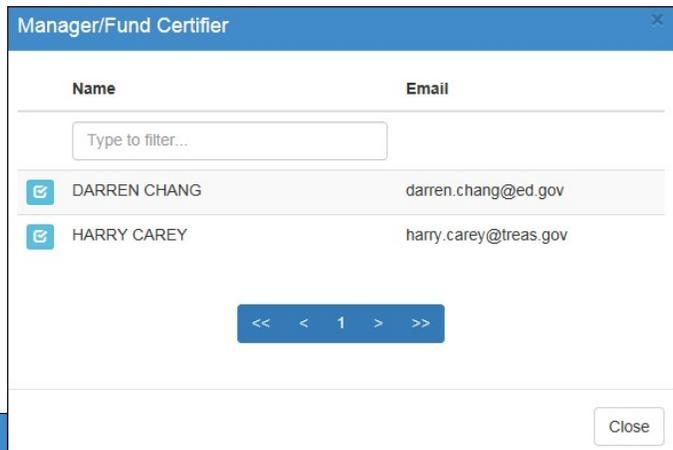
The screenshot shows a dialog box titled 'Approving Official'. It has a search bar with the placeholder text 'Type to filter...'. Below the search bar is a table with two columns: 'Name' and 'Email'. One row is visible, showing 'HARRY CAREY' and 'harry.carey@treas.gov'. At the bottom of the table is a pagination control with buttons for '<<', '<', '1', '>', and '>>'. A 'Close' button is located in the bottom right corner of the dialog box.

Agency Optional Display Fields

Figure 36: Approving Official

- 18. Click the **Select** button to display the list for your agency’s Managers (2nd Approver).
- 19. Select your Manager (2nd Approver).

Figure 37: Manager/Fund Certifier



- 20. Click the **Select** button to display the list for your agency’s LTCs.
- 21. Select your LTC.

Note: *The approver and POC field labels can be renamed by the Agency. SSA employees will see LTC in lieu of POC.*

Figure 38: Point of Contact/ Enter your SmarTrip® card information. **If you have not purchased or do not use a SmarTrip® card, enter NA.** See

[Appendix A – SmarTrip® Card Instructions.](#)

Note: *This field is only valid for DC, MD and VA Corridor participants (Participants who work in the NCR).*

- Enter any information that will assist your Agency Approver with processing your application in the Comment for Agency Approvers textbox. This field must be used to show temporary assignments or temporary employment start and end dates.

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.*

Note: *Work and Residence addresses are verified via the USPS database. Enter the street address and then the zip code. The City and State are auto populated.*

- Click the **Continue** button. **Note:** *If a smartrip card number was entered in the Smartrip Card Number field, the SmartBenefits® Program page is displayed.*

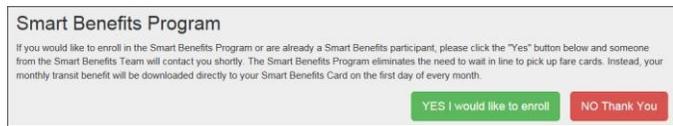
The screenshot shows a web form titled "Transit Benefit Program Application". The form is divided into several sections:

- Personal Information:** Includes fields for Identifier (masked), Name (RODRIGUEZ, KAREN, LYNN LEE), Email Address (Karen.rodrigueztest@treas.gov), and Work Phone (202-555-7164). A Common Identifier field contains "HELLOKITTY".
- Department of Treasury:** Includes dropdowns for "Select Your Agency" (TRE-HQ) and "Region" (DC). An "Admin" dropdown is set to "TRE-HQ-DC". There are "Select" buttons for Accounting Code, Routing Symbol, and Location/Building, each with a "Click the Select button to select..." instruction.
- Work Information:** Includes "Work Address" (401 M ST SE), "Work Zip" (20003), "Work City" (WASHINGTON), and "Work State" (DC). A field for "monthly Transit commuting costs" is set to "\$ 200.00".
- Residence Information:** Includes "Address" (1200 NEW JERSEY AVE SE), "Address 2", "Zip" (20090), "City" (WASHINGTON), and "State" (DC).
- Approver Information:** Includes "Approving Official" (CAREY, HARRY) and "Manager/Fund Certifier" (CAREY, HARRY), both with "Select" buttons. "Point of Contact" is set to "TREASURY POC" and "Manager Phone" is empty.
- SmartTrip Card Number:** Set to "NA".
- Comment for Agency Approvers:** A text box containing "HELP ME HELP YOU" with a character count of "You have 1979 characters remaining".

At the bottom right, there are "Continue" and "Cancel" buttons.

Figure 39: Completed Transit Benefit Application

24. Click the **YES I would like to enroll** button to join the SmartBenefits® program. By clicking yes, you agree to have your



transit benefits downloaded to your SmarTrip® card the first of every month. **This only applies to employees who work in the NCR.**

27. Click the **NO Thank You** button if you do not want to join the SmartBenefits® program.

28. After clicking the **YES** or **NO** button, the application is submitted and redisplayed with a confirmation message at the top of the page. **Figure 41: Transit Benefit Program Confirmation**



Figure 40: Smart Benefits Program page

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

3.1.5 Monthly Certification

The Monthly Certification option allows the applicant to recertify without having to update any participant information. This does not apply to SSA applicants.

1. Select the Monthly Certification radio button.
2. Click the **Continue** button. The Warning page is displayed.
3. 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 **Figure 42: Warning page**

Select an Action to Continue page.

Note: The applicant must be enrolled in the Transit Benefit Program to apply for monthly certification. Registering a username does not mean that the applicant has enrolled in the program.

Note: Participants must be set up to allow for monthly certifications. This does not apply to SSA employees.

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.

- The application displayed is the current application on file. Verify that all pre-populated information is correct and valid.

Note: *The applicant can ONLY update the method of transportation and rates when submitting monthly certifications.*

Note: *If the address entered when the application was initially submitted is invalid; the monthly certification will not be able to be submitted. The applicant will need to submit an application via Certify/Enroll to correct the address.*

Note: *If the Manager, Supervisor, or RTC selected when the application was initially submitted is no longer available for selection; the monthly certification will not be able to be submitted. The applicant will need to submit an application via Certify/Enroll to update the Manager, Supervisor, or POC selections.*

Figure 43: Transit Benefit Program Application for Monthly

Thank you, your Monthly Certification application has been submitted.

Certification

5. Click the **Continue** button. The application is submitted and redisplayed with a confirmation **Figure 44: Monthly Certification Confirmation** message.

3.1.6 Disapproved Applications

Applications that have been Disapproved are sent back to the applicant. If corrections are needed the applicant can make those corrections and resubmit the application.

1. From the Home page; click the **Transit Benefit Application** button. The Select an Action to Continue page displays. The reason the application was disapproved is displayed at the top of the page.
2. Select the Update Disapproved Application Certification radio **Figure 45: Select An Action To Continue** page button.
3. Click the **Continue** button. The Warning page is displayed.
4. After reading the message; click the **I Agree** button. The disapproved Transit Benefit Application Worksheet is displayed.

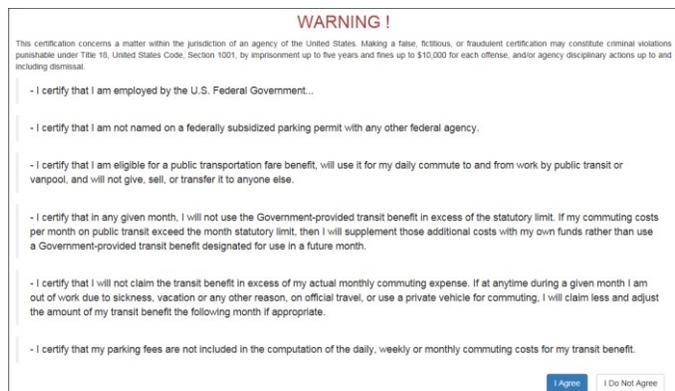
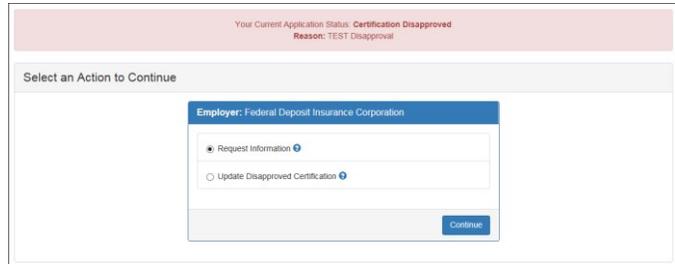


Figure 46: Warning page

Note: *If the applicant does not agree, click the I Do Not Agree button to display the Select an Action to Continue page.*

The screenshot shows a web-based application form for a transit benefit program. At the top, a yellow banner displays the disapproval reason: "Disapproved Reason: Last 4 000s not entered. Please enter and resubmit." Below this, the form is divided into several sections:

- Certify/Enroll / Status: Certification Disapproved:** This section contains instructions for the applicant to calculate their "Total Monthly Expense" based on their transportation methods (e.g., transit, vanpool, bicycle, car, motorcycle, walk, or other). It includes a "Reason for Certification" dropdown and fields for "Custom/Military" and "Work Status".
- Transit Benefit Transportation Methods:** This section provides instructions on how to enter work schedule information, including fields for "Days per Month" and "Monthly Expense" for different modes of transport.
- Federal Deposit Insurance Corporation:** This section includes fields for "Select Your Agency" (e.g., FISC), "Region" (e.g., BALTIMORE), "Agency Code", "Accounting Code", "Routing Number", and "Location/Building".
- Work Information:** This section includes fields for "Work Address", "Work Zip", "Work City", and "Work State".
- Residence Information:** This section includes fields for "Address", "City", and "State".
- Approver Information:** This section includes fields for "Approving Official" (e.g., DEBATE, KOCKARBE) and "Manager Fund Center" (e.g., ANNEP, KENNEDY).

At the bottom of the form, there is a "Comment for Agency Approver" field and a "You Have 1000 Characters Remaining" indicator. The form concludes with "Continue" and "Cancel" buttons.

- The reason the application was disapproved is displayed at the top of the Transit Benefit Application Worksheet and the Transit Benefit Program Application.
- The applicant’s information entered when the application was submitted is displayed in the fields. Make the noted 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 require the applicant to complete and resubmit a new application.

Note: *If a Monthly Certification was disapproved, the applicant will need to click the Delete Application and Start Over button to resubmit the application via Certify/Enroll to make the necessary corrections.*

Figure 47: Disapproved Transit Benefit Application Worksheet

4. AGENCY REPORTS

Use the following steps to download an agency report:

1. From the Home page, click the Agency Reports button; the Agency Reports page displays.



Figure 48: Agency Reports page

2. Click the link to display the Open/Save dialog message.

Note: Click the Open button to display the zip file or click the Save button to choose a location to save the zip file.

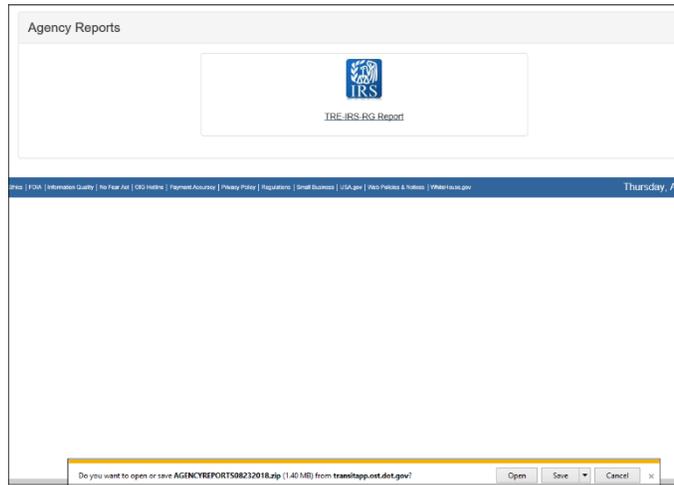


Figure 49: Open/Save Dialog Message 3. Extract

the files to view the reports.

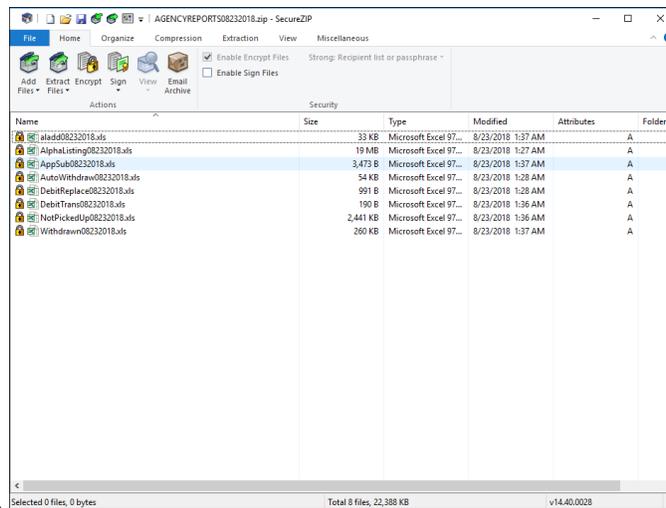


Figure 50: Zip File

APPENDIX A: SMARTRIP CARD INSTRUCTIONS

For Smart Benefit Participants: Purchase and Register a SmarTrip® card

SmarTrip® card usage is mandatory for all participants in the National Capital Region.

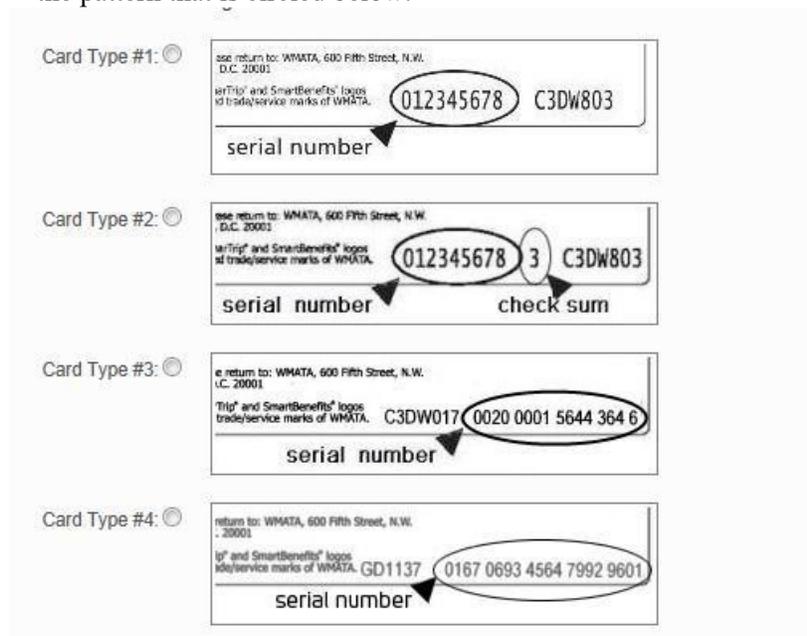
1. Purchase a SmarTrip® Card – This is a reloadable electronic fare card. Using a reloadable card supports the government’s initiatives to support and improve the environment.
 - a. You can do this at a Metro Sales Store, Station Kiosk (these are located in Stations where parking is available, a Commuter 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:
<http://www.wmata.com/fares/purchase/>

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

2. 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:



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.

