United States Department of Transportation

TRANSERVE ELECTRONIC APPLICATION SYSTEM TRANSIT BENFIT PROGRAM APPLICANT GUIDE

Submitted by

TRANServe

A division of the

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1. OVERVIEW

1.1 Background

The Department of Transportation, Transportation Services Division (TRANServe), administers the Parking and Transit Benefits program. This system will serve as the publicly accessible interface for managing the Transit Benefit Program. TRANServe Services include purchasing and distributing transit fare media through the TRANServe 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, proving 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 Benefit Electronic Application into a "new" user friendly, mobile site designed specifically for mobile devices. The mobile version of the Electronic Benefit Application 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, Program Office 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 Electronic 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

1.4 Point of Contacts

The table below provides a list of the people you may contact for additional information regarding the Transit Application or for troubleshooting purposes.

Role	Name/Phone	Title	Email
Program Coordinator	Reginald B. Swann, II	Management Analyst	Reginald.b.swann.ii@census.gov
Section Chief	Starnard Dandridge	Program Analyst	Starnard.dandridge@census.gov
Branch Chief	Daneeta Swinton	Supervisory Management Analyst	Daneeta.c.swinton@census.gov

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. If your Agency requires you to complete the Transit Benefit Integrity Awareness Training; click the *Integrity Awareness Training* link. (Follow the instructions to complete the Transit Benefit Integrity Awareness Training).
5. Click the *Participants* link again and scroll down to select your Agency.
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 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 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.

Figure 6: Change Password page

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.

Your Password has been successfully changed.
Use your Username and New Password to login to the system.

Figure 7: Change Password Confirmation

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.*

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.

Figure 9: Forgot Password page

- 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 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.

Figure 11: Update My Account page

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 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 Parking and 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.*

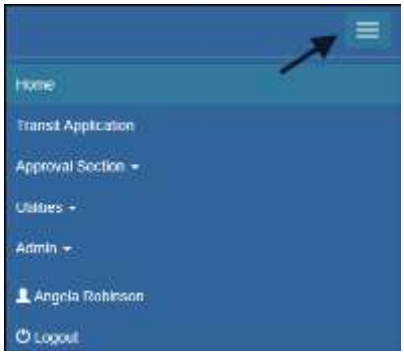


Figure 15: Additional Menu Options

3.1 Transit Benefit Application

The Transit Benefit Application option allows the applicant to request information, withdraw from the program, report SmartBenefits ® Card and address 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

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 Point of Contact (POC). 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 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.
3. Select a POC from the list.
4. Enter the question or concern in the Question textbox and click the **`Send Request`** button.

Figure 17: Request Information page

Figure 18: Point of Contact

5. An email is sent to the selected TRANServe POC. The Home page is displayed with a confirmation message at the top of the page.

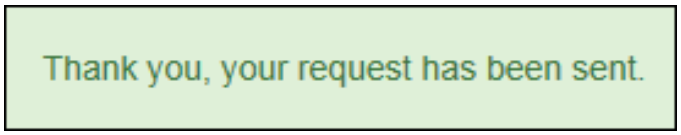


Figure 19: Request Information Confirmation

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.

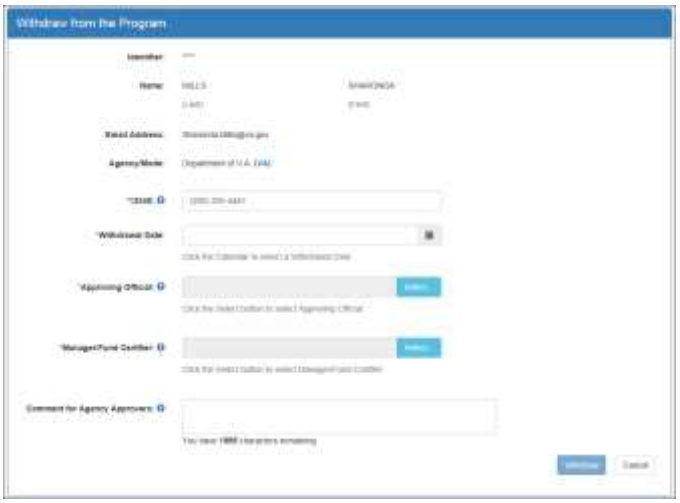


Figure 20: Withdraw from the Program page

4. Click the **Select** button to display the list for your agency's approving officials (1st Approvers).
5. Select your Approving Official (1st Approvers).

Figure 21: Approving Official (1st Approver)

6. Click the **Select** button to display the list for your agency's manager/fund certifiers (2nd Approvers).
7. Select your Manager/Fund Certifier (2nd Approver).

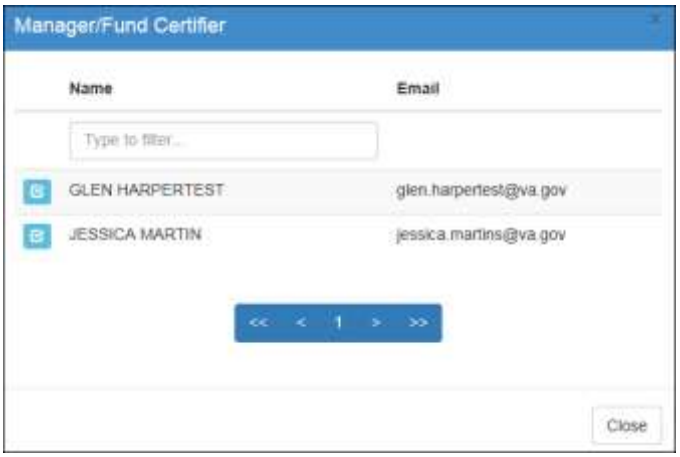


Figure 22: Manager Fund/Certifier (2nd Approver)

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 label can be renamed by TRANServe.*

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

Figure 23: Withdraw Confirmation

3.1.3 Address/SmarTrip® Change

The feature is *only* for those enrolled in SmartBenefits. 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.*

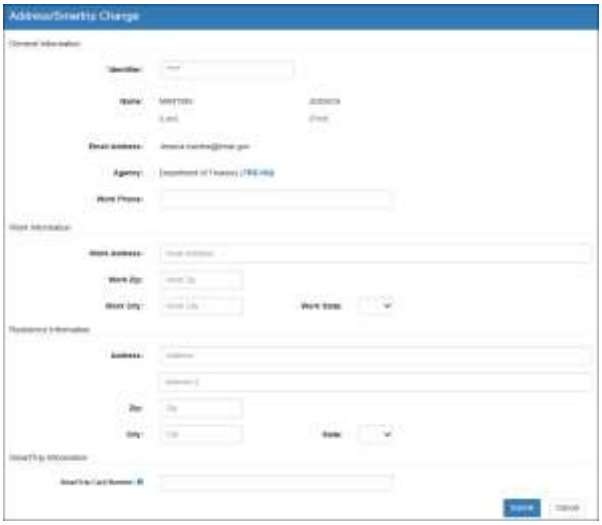


Figure 24: Address/SmarTrip® Change page

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

3.1.4 Certify/Enroll

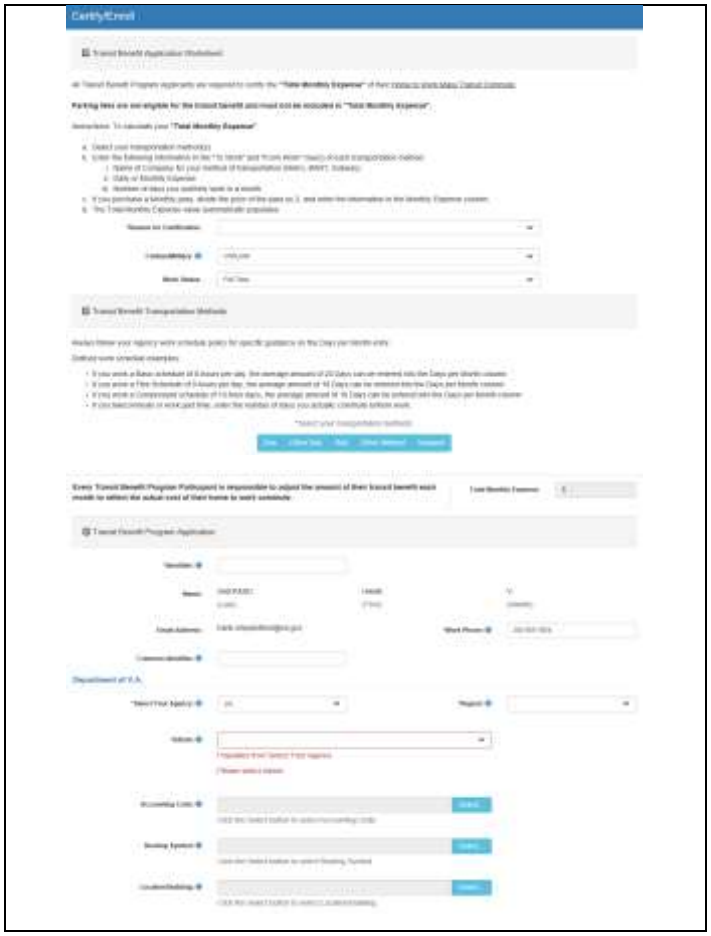
The Certify/Enroll option allows the applicant to enroll in the transit benefit program by submitting an application. Use the following steps to certify/enroll in the Transit Benefit Program:

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.*

Figure 26: Warning page

4. Select the reason for certification.
   - 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 – Same employer
   - Annual Certification/Recertification
   - New Transit Benefit Participant
   - Rate Change
   - Vendor and Rate Change
5. Select your Employment Type.
6. Select your work status.
   - Full Time
   - Part time
   - Intern



Note: * *indicates required field.*

Note: *Your employing Agency may have relabeled this field or removed it from view*

Note: *Some agencies require the applicants to certify to integrity awareness training completion. If this is required; a checkbox will be displayed when the Annual Certification/Recertification or New Transit Benefit Participant reasons are selected.*

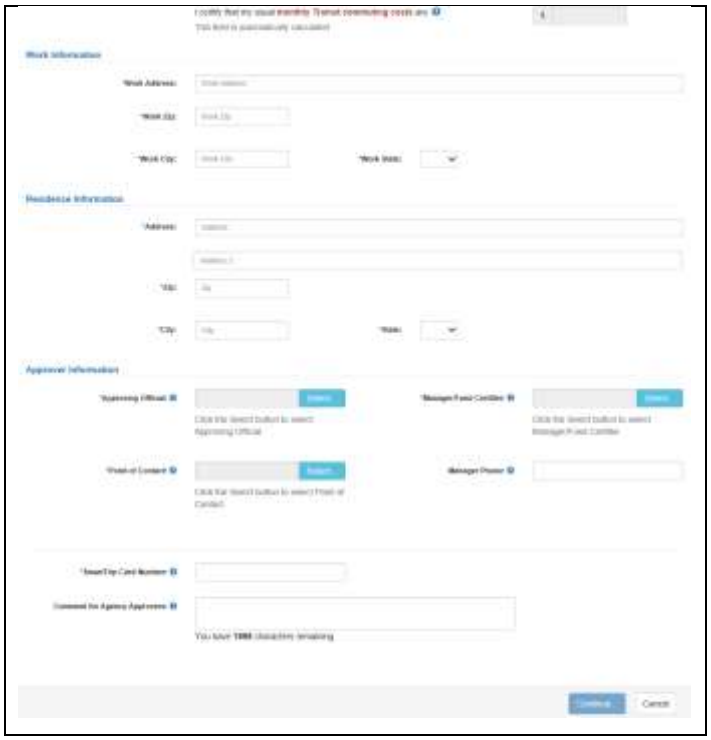


Figure 27: Transit Benefit Application Worksheet

7. Select your transportation method(s).
   - Bus

Figure 28: Bus Method

   - Other Bus

Figure 29: Other Bus Method

   - Rail

- Other Method

- Vanpool

- Parking

U.S. Census does not use this feature.

Note: *The Agency must be set up to track parking costs. The Parking cost is separate from the Transit cost and is not calculated together.*

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.*

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

Note: *Some agencies require additional transportation information. If this is required; a textbox will be displayed below the Name of Company field.*

The additional info label can be renamed by the Agency TBM.

Note: *The Monthly Expense and the Total Monthly Expense is automatically calculated when you enter the Daily Expense and the Days per Month.*

.

Figure 30: Rail Method

Figure 31: Other Method

Figure 32: Vanpool Method

Figure 33: Parking Method

Figure 34: Sample Agency Work Schedule Policies

Figure 35: Method of Transportation Table

9. Enter the Identifier. This field is used to uniquely identify the applicant.
10. Enter the Common Identifier. Depending on the agency, the Common Identifier can be a debit card activation keyword or number.

Note: *Your employing Agency may have relabeled this field or removed it from view*

11. Select your Region.
12. Select your Admin.
13. Depending on the Agency, three optional fields may be displayed (i.e. Accounting Code, Routing Symbol, and Location/Building). Click the **`Select`** link to display the available list for your agency.

Note: *Your employing Agency may have relabeled these fields or removed it from view*

14. Enter your Work Information.
15. Enter your Residence Information.
16. Click the **`Select`** button to display the list for your agency's approving officials (1st Approver).
17. Select your Approving Official (1st Approver).

Agency Optional Display Fields

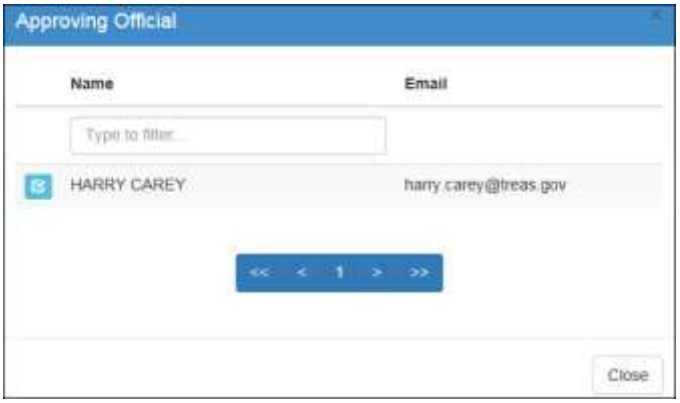


Figure 36: Approving Official

18. Click the **`Select`** button to display the list for your agency's manager/fund certifiers (2nd Approver).
19. Select your Manager/Fund Certifier (2nd Approver).

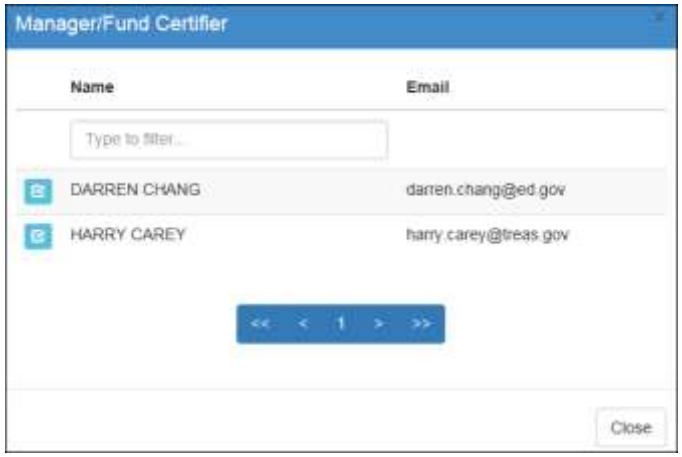


Figure 37: Manager/Fund Certifier

20. Click the **`Select`** button to display the list for your agency's point of contacts.
21. Select your Point of Contact.

Note: *The approver and POC field labels can be renamed by your Agency.*

Figure 38: Point of Contact

22. 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 participants within the National Capital Region.*

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

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.*

24. Click the **`Continue`** button.

Note: *If a SmarTrip® card number was entered in the Smartrip® Card Number field, the SmartBenefits® Program page is displayed.*

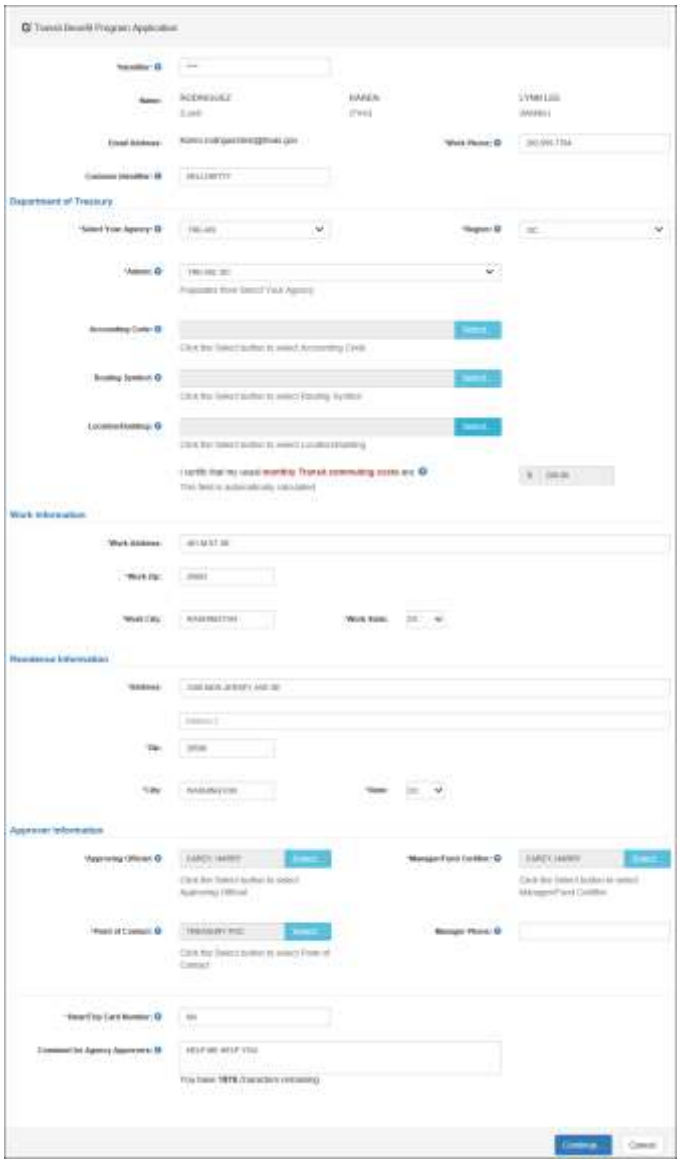


Figure 39: Completed Transit Benefit Application

Figure 40: Smart Benefits Program page

25. 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.
26. Click the **`NO Thank You`** button if you do not want to join the SmartBenefits® program.
27. After clicking the **`YES`** or **`NO`** button, the application is submitted and

redisplayed with a confirmation message at the top of the page.

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

Figure 41: Transit Benefit Program Confirmation

3.1.5 Monthly Certification

U.S. Census does not use this feature. The Monthly Certification option allows the applicant to recertify without having to update any participant information.

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.

Figure 42: 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.*

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.*

4. 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 POC 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.*

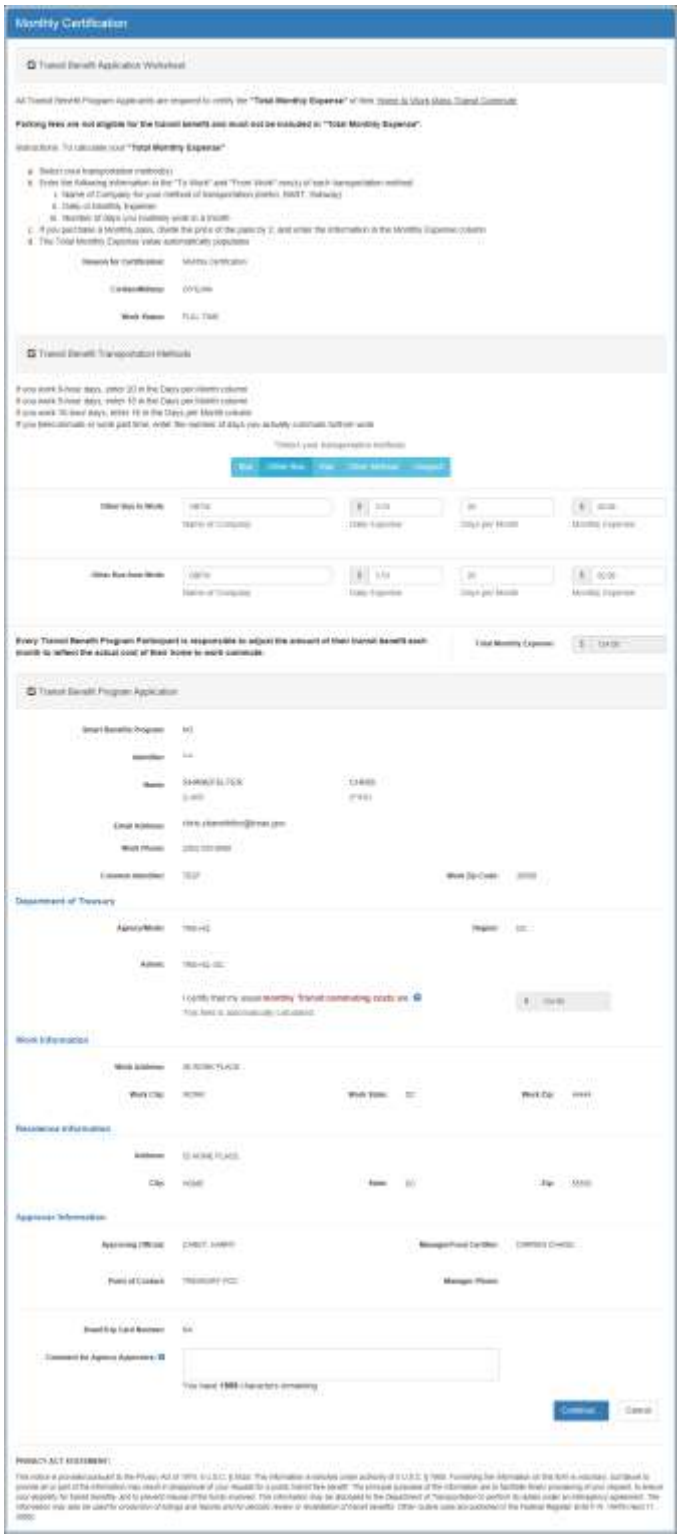


Figure 43: Transit Benefit Program Application for Monthly Certification

5. Click the **`Continue`** button. The application is submitted and

Thank you, your Monthly Certification application has been submitted.

redisplayed with a confirmation message.

Figure 44: Monthly Certification Confirmation

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 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 45: Select An Action To Continue page

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 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.*

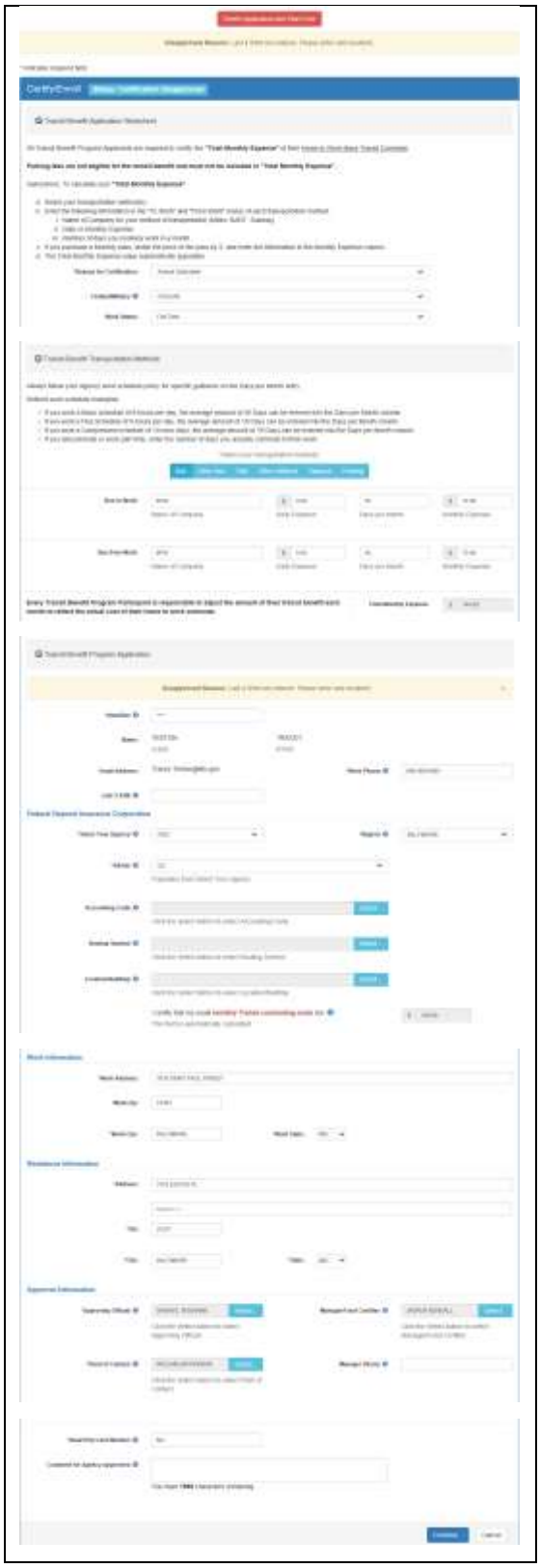


Figure 47: Disapproved Transit Benefit Application Worksheet

4. AGENCY REPORTS

Use the following steps to download an agency report, if you were permitted access:

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.

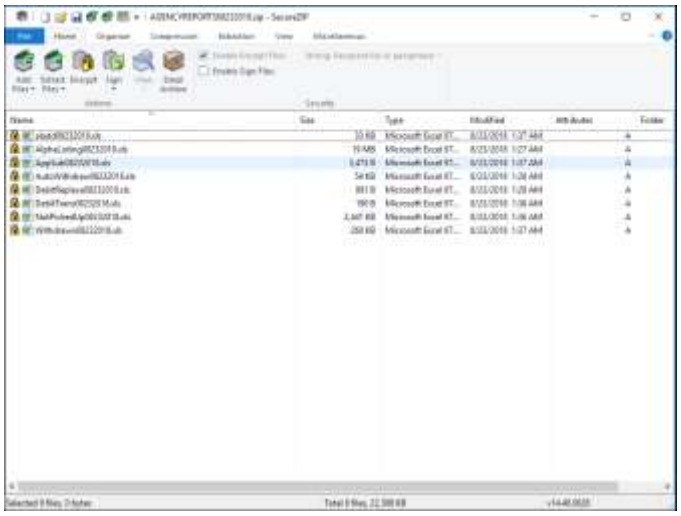


Figure 50: Zip File

APPENDIX A: SMARTRIP CARD INSTRUCTIONS

For SmartBenefits® Participants: Purchase and Register a SmarTrip® card

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

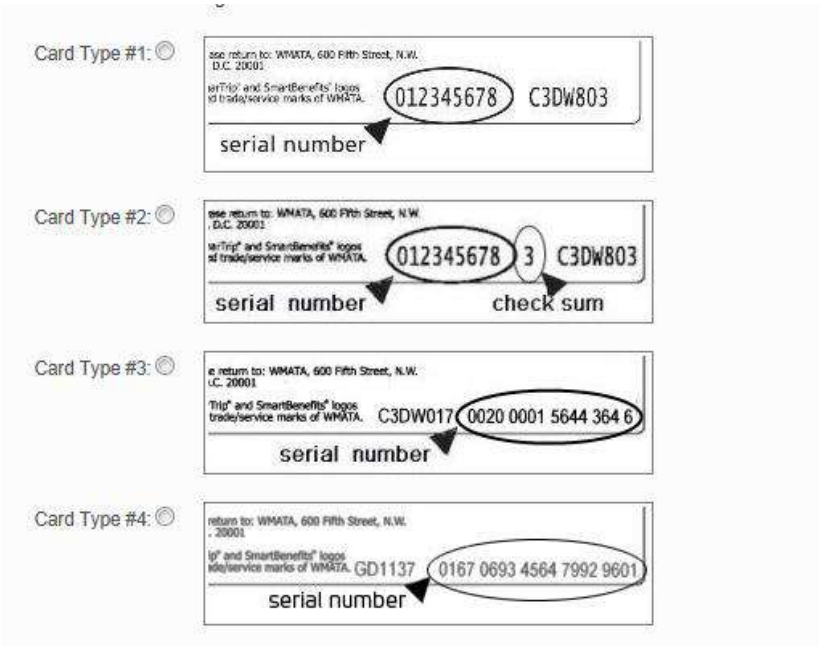
1. Purchase a SmarTrip® Card – This is a reloadable electronic fare card. Using a reloadable card supports the government's initiatives to support and improve the environment.
    - a. You can do this at a Metro Sales Store, Station Kiosk (these are located in Stations where parking is available, a Commuter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