TRANSIT BENEFIT PROGRAM

APPLICATION SYSTEM

APPROVER

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. OVERVIEW 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. ACCESSING 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 2-7
2.6 Exit 2-7

3. OVERVIEW OF THE HOME PAGE 3–1
3.1 Transit Benefit Application 3–2
3.1.1 Request Information 3–2
3.1.2 Withdraw from the Program 3–4
3.1.3 Address/SmarTrip® Change 3–6
3.1.4 Certify/Enroll 3–7
3.1.5 Disapproved Applications 3–14

4. APPROVAL SECTION 4–1
4.1 Approval Process 4–1
4.1.1 Delete Application 4–3
4.2 Approved/Disapproved/Completed Records 4–3

5. ADMIN 1
5.1 User Admin 1
5.1.1 Add User 2
5.1.2 Update User 3
5.1.3 Delete User 3
5.1.4 Bulk Update View 4
5.1.4.1 Single User Role Update 4
5.1.4.2 Multiple User Role Update 5
5.1.4.3 Role Update Lock 6

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 2-3
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 14: Update My Account Information (Proxy) 2-6
Figure 15: Selected Proxy 2-6
Figure 13: Utilities Menu Options 2-7
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: Approving Official (1st Approver/Supervisor) 3–4
Figure 21: Manager Fund/Certifier (2nd Approver/ Workforce Support Center) 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: 1st Approver/Supervisor 3–11
Figure 35: 2nd Approver/Workforce Support Center 3–11
Figure 36: Points of Contact 3–12
Figure 37: Completed Transit Benefit Application 3–13

Figure 38: SmartBenefits® Program page 3–13
Figure 39: Transit Benefit Program Confirmation 3–14
Figure 40: Select An Action To Continue page 3–14
Figure 41: Warning page 3–15
Figure 42: Disapproved Transit Benefit Application Worksheet 3–16
Figure 43: Approval page 4–1
Figure 44: Approval Section Menu Options 4–2
Figure 45: Delete Confirmation page 4–3
Figure 46: Approved Records 4–3
Figure 47: Disapproved Records 4–3
Figure 48: Find Completed Applications page 4–4
Figure 49: Completed Records 4–4
Figure 50: Admin Menu Options 1
Figure 51: Find Users page 1
Figure 52: Users Search Results page 2
Figure 53: Add User Account Information page 2
Figure 54: Add User Confirmation 2
Figure 55: Update User Account Information page 3
Figure 56: Update User Confirmation 3
Figure 57: Confirm Delete Message 3
Figure 58: Delete Confirmation 3
Figure 59: Bulk Update View page 4
Figure 60: Single User name Select 4
Figure 61: Role Change Select 4
Figure 62: Role Update 4
Figure 63: Confirm Bulk Update Message 4
Figure 64: Role Update Confirmation 5
Figure 65: Multiple Modes 5
Figure 66: Multiple User name Select 5
Figure 67: Bulk Role Update Select 5
Figure 68: Bulk Role Update 5
Figure 69: Confirm Bulk Update Message 5
Figure 70: Pending Application Link 6
Figure 71: Pending Transit Benefit Application Status page 6
Figure 72: Open Application Confirmation Message 6

1. OVERVIEW

1.1 Background

The Department of Transportation, Transportation Services Division (TRANServe), administers the Transit Benefit Program for DOT and as Service Provider to other federal agencies, nation-wide. The Office currently supports federal agencies and sub-agencies, providing timely and efficient transit benefit program services to customers who will use TRANServe's Transit Benefit Application System. Services include purchasing and distributing mass transit fare media.

TRANServe's Electronic Application System serves as the publicly accessible interface for managing Transit Benefit Program Applications. The current application system is available on-line through the internet and is optimized for desktop and mobile devices. Federal government employees can apply for the transit benefit, request information, withdraw from the program and recertify. Agency Program Offices and Approvers are able to view, update, approve, or disapprove applications using the System.

1.2 Purpose

The Transit Benefit Application System user guide is designed to provide written instruction on how to use the application effectively and efficiently. Screenshots serve as examples. Field labels may not be Agency specific.

1.3 Document Organization

The following typographical conventions are used in this user guide:

- **`Courier New Bold`** Indicates a button on a page
- *Underline Italic in blue* Indicates a link within the system
- Title Case plus page Indicates a name of a page in the application
- *Italic text* Indicates a note on a page in the application

1.4 Points of Contact

The table below provides a list of contact for additional information regarding the Transit Benefit Application process.

Role	Name/Phone	Title	Email
NGA Transit Benefit Office	Diane Washabaugh	Program Mgr.	TransitBenefitOffice@nga.mil
NGA Transit Benefit Office	Alisha Warner	FM Travel Specialist	TransitBenefitOffice@nga.mil
NGA Transit Benefit Office	Fred Brown	FM Travel Specialist	TransitBenefitOffice@nga.mil
Workforce Support Center	Mark Claywell	Manager	NCWTransitSubsidyProgram@nga.mil
Workforce	Kathe Hofman	Customer	NCWTransitSubsidyProgram@nga.mil

Role	Name/Phone	Title	Email
Support Center		Service	
Workforce Support Center	Tammy Gray	Customer Service	NCWTransitSubsidyProgram@nga.mil
First Level Manager	Susan Perry	Financial Policy Dep. Dir.	TransitBenefitOffice@nga.mil

2. ACCESSING THE TRANSIT BENEFIT APPLICATION

2.1 Login Screen

Use the following steps to access the application:

a. Enter the URL: http://transitapp.ost.dot.gov. The Transit Benefit Application System home page is displayed.

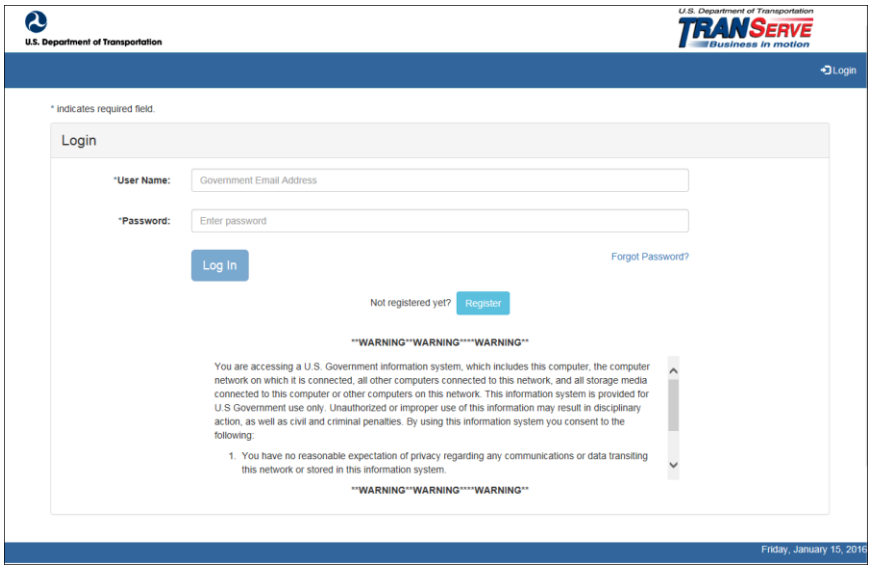


Figure 1: Transit Benefit Application Log In page

First time users must register. Use the following steps:

b. Click the **`Register`** button. The Register Account Information page is displayed.

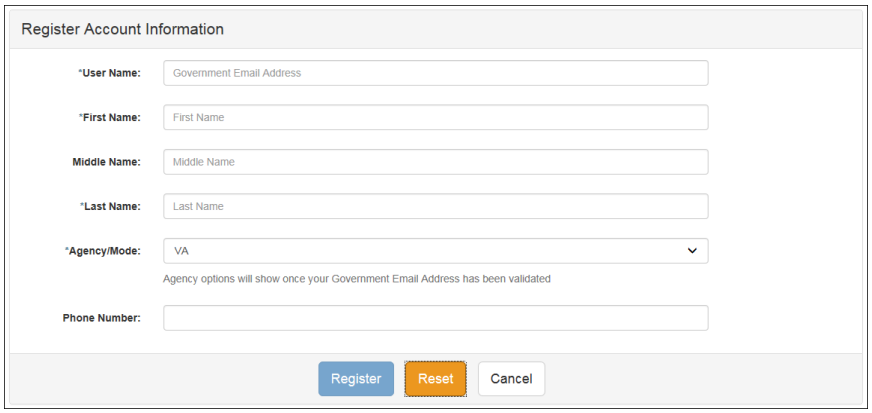


Figure 2: Register Account Information page

Note: * *indicates required field.*

c. Enter your official government email address in the User Name textbox.

d. Complete the registration form.

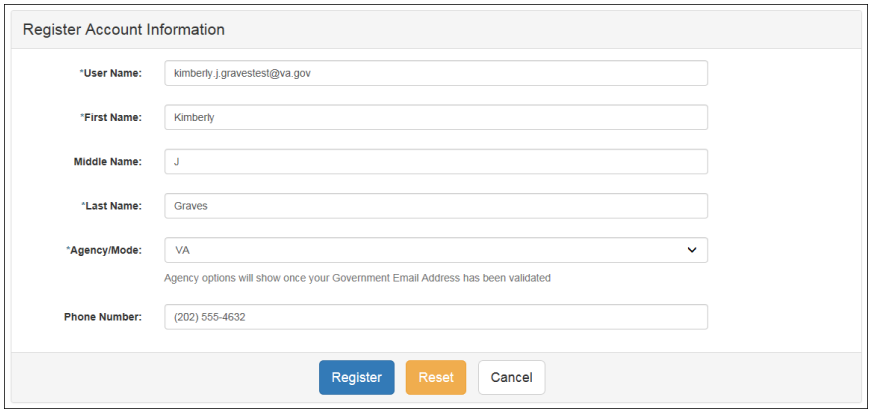


Figure 3: Completed Registration page

Note: *The agency domain name used in the email for the user name 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.

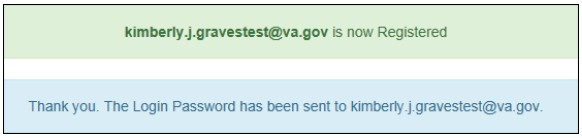


Figure 4: Registration Confirmation

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.

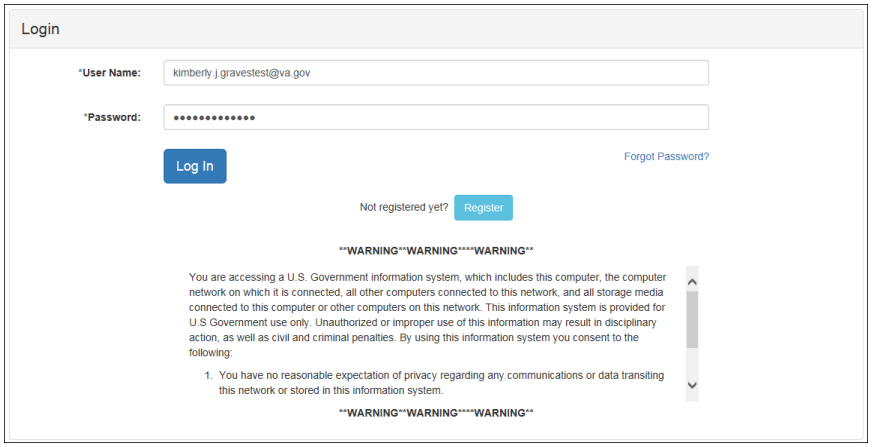


Figure 5: Log In page

i. Click the **`Log In`** button.

j. The Change Password page displays.

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.

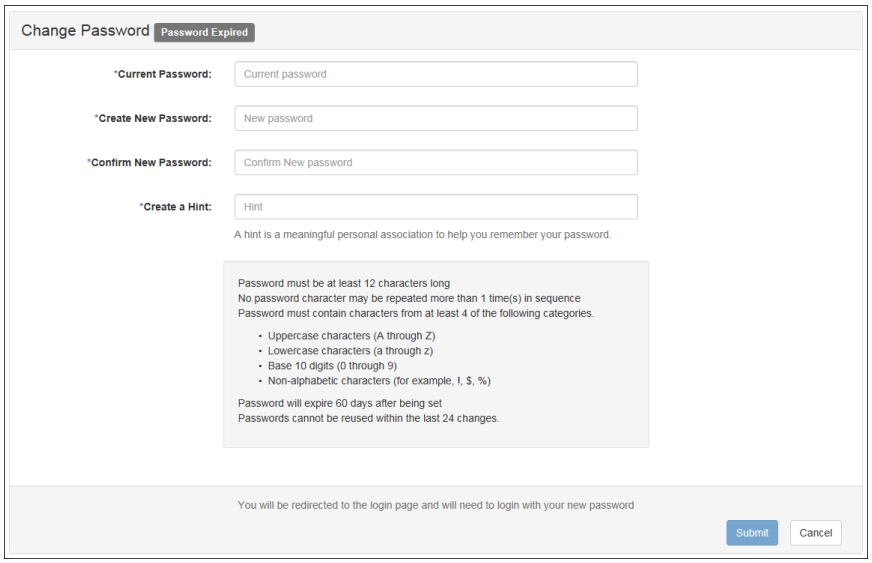


Figure 6: Change Password page

   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.

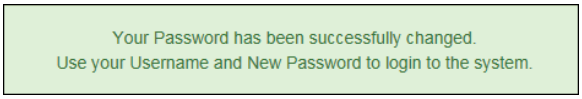


Figure 7: Change Password Confirmation

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.*

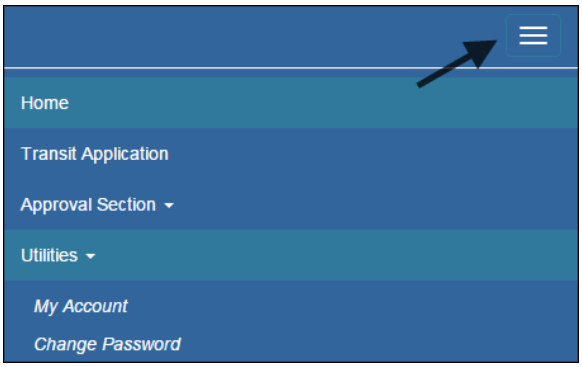


Figure 8: Utilities Menu Options

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.

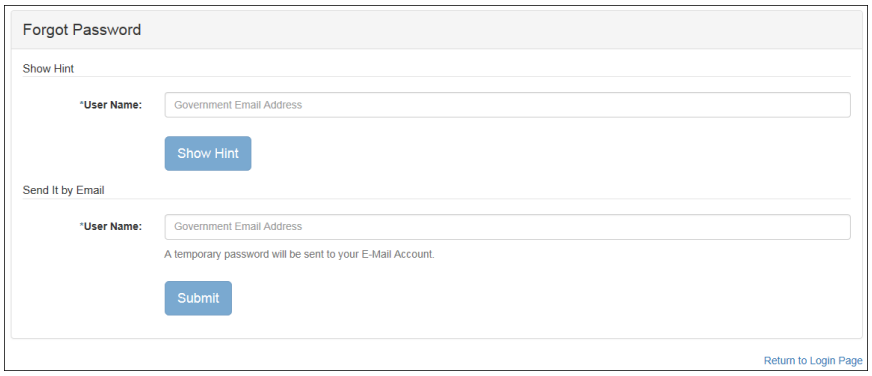


Figure 9: Forgot Password page

a. The Show Hint section allows the user to view the Hint entered when the password was last changed. Enter the user name 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.

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 user name and click the **`Submit`** button.

Note: * *indicates required field.*

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

2.4 My Account

The My Account page allows the user to update personal information and to select a proxy. The functionality to assign a proxy is available for Approving Officials: Supervisors, Managers, and Program Admins.

1. From the Home page; click the **`My Account`** button. The Update My Account Information page displays.

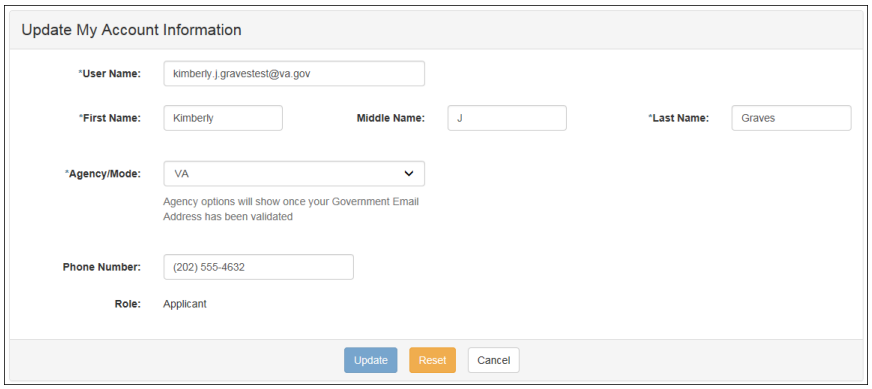


Figure 11: Update My Account page

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.

Figure 12: Update My Account Confirmation

Use the following steps to select a proxy:

1. From the Home page; click the **My Account** button. The Update My Account Information page displays.

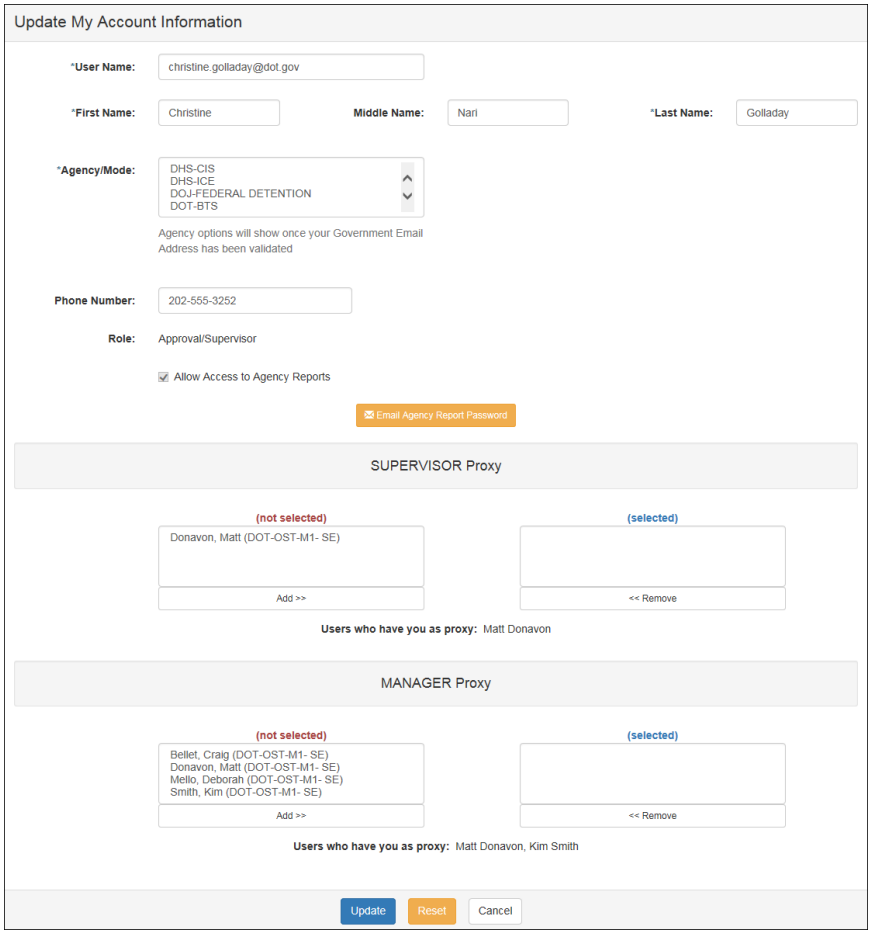


Figure 13: Update My Account Information (Proxy)

Available supervisor and/or managers will be displayed in the Add select box.

2. Select the proxy. Click the **Add** button to add the proxy to the column on the right.

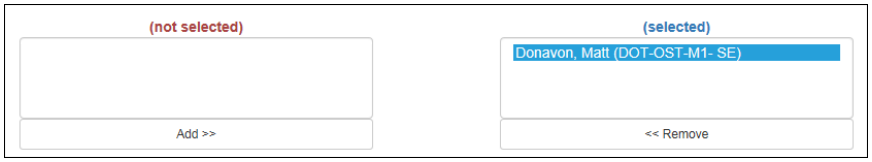
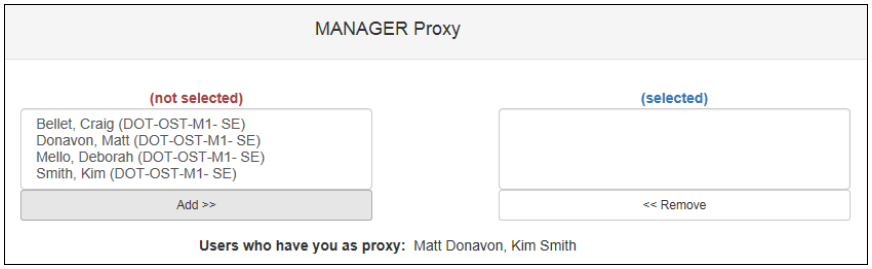


Figure 14: Selected Proxy

To remove a proxy from the column, select the proxy and click the **Remove** button.

Approvers that have the logged on user set as their proxy will be displayed below the table.



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.*

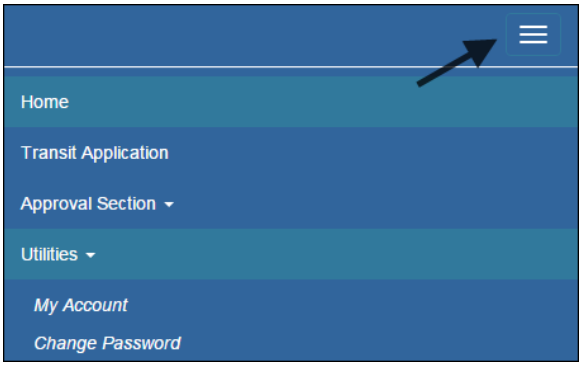


Figure 15: Utilities Menu Options

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.
  - Approval Section – This functionality is only available for Approving Officials: Supervisors, Managers, and Program Admins. Click this tab to display the available approval levels. Approved Records, Disapproved Records and Competed Records can also be accessed from this tab.
  - 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.
  - Approval Section – This functionality is only available for Approving Officials: Supervisors, Managers, and Program Admins. Click this button to display the first level approval 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.

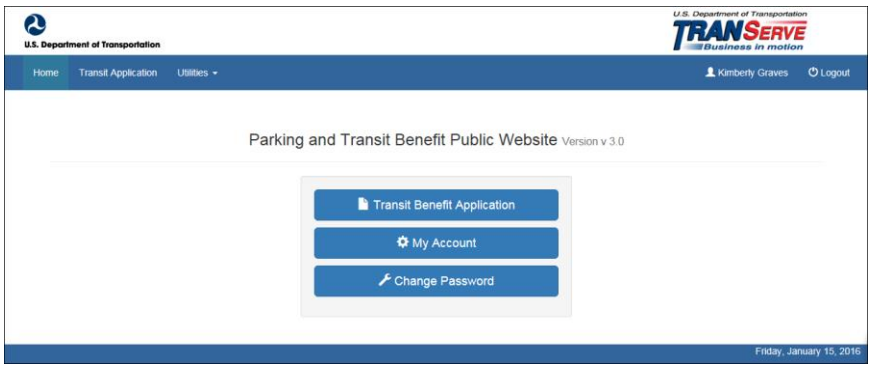


Figure 16: Website Home page

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.*

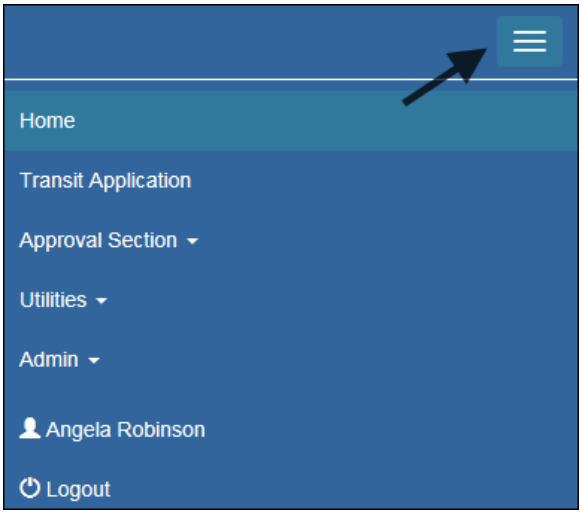


Figure 17: Additional Menu Options

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.

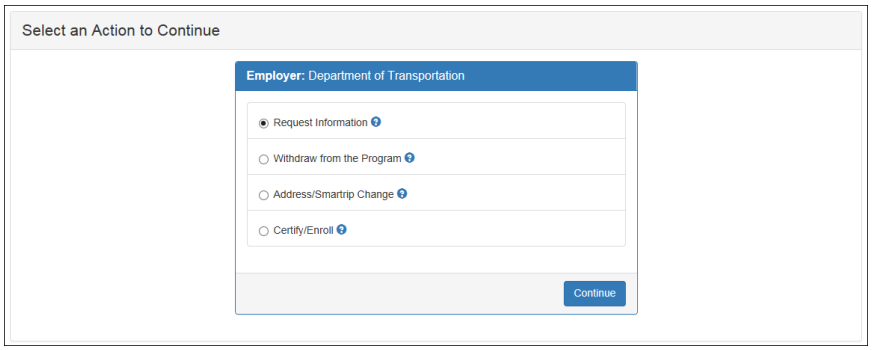


Figure 18: Select An Action To Continue page

3.1.1 Request Information

The applicant can request information from the NGA Transit Benefit Program Office by submitting questions regarding the transit benefit program or a submitted application through the Point of Contact (POC).

1. The Request Information radio button is selected by default when the page is displayed. Click the **`Continue`** button to display the Request Information page.

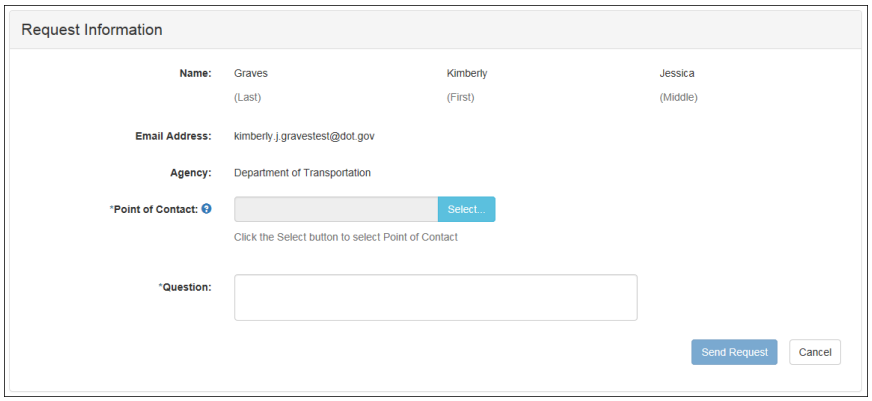


Figure 19: Request Information page

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.

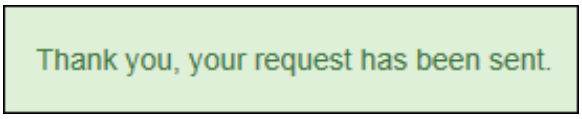


Figure 20: Request Information Confirmation

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.

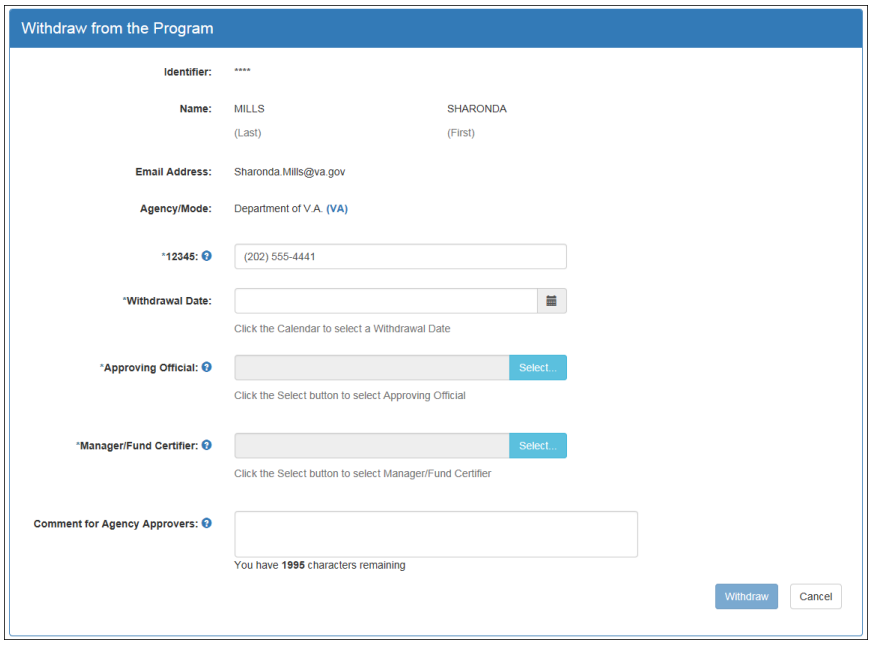


Figure 21: Withdraw From The Program page

   b. Click the pop up calendar to select a withdrawal date.
   c. Click the **Select** button to display the list for your agency's 1st Approvers (Supervisors).

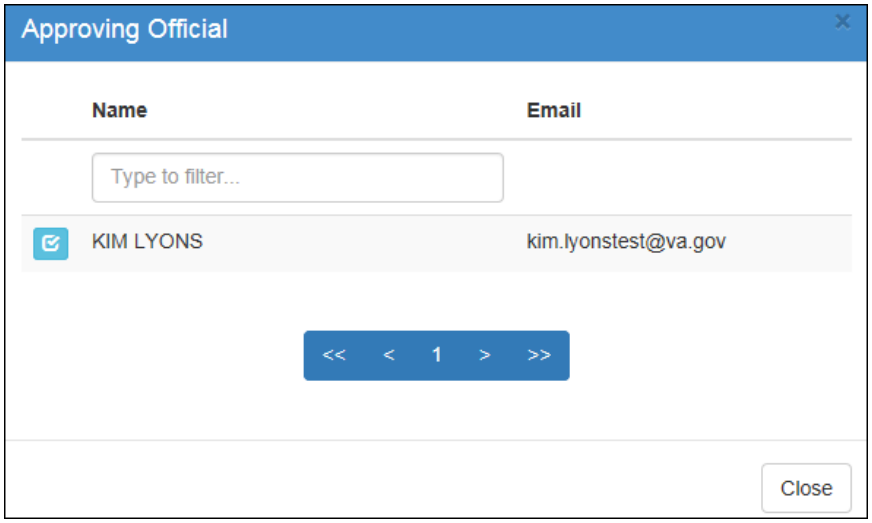


Figure 22: Approving Official (1st Approver/Supervisor)

   d. Select your Approving Official (1st Approvers/Supervisors).
   e. Click the **Select** button to display the list for your agency's 2nd Approvers (Workforce Support Center).

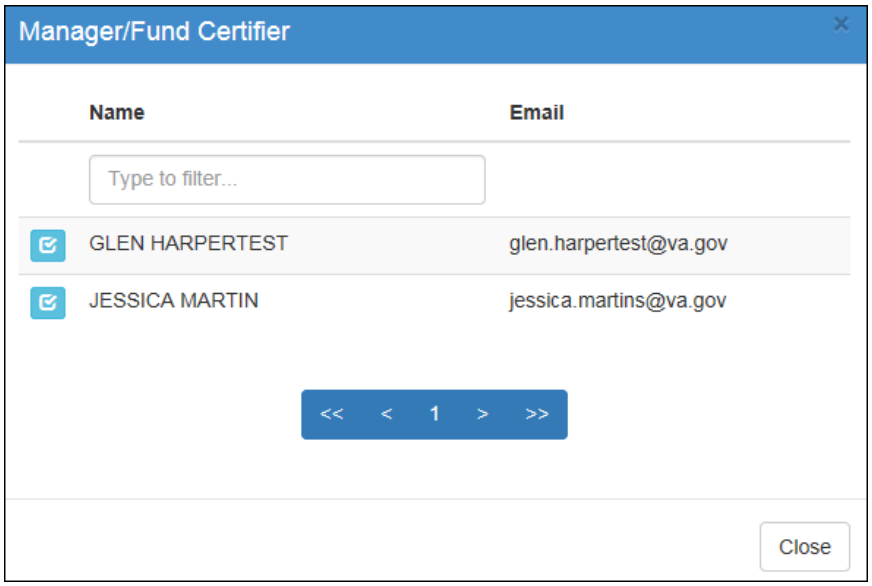


Figure 23: Manager Fund/Certifier (2nd Approver/Workforce Support Center)

f. Select your 2nd Approver (Workforce Support Center).

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.

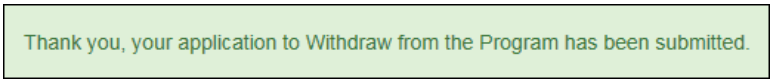


Figure 24: Withdraw Confirmation

Note: *The applicant must be enrolled in the Transit Benefit Program to withdraw. Registering a user name does not mean that the applicant has enrolled in the program.*

3.1.3 Address/SmarTrip® Change

The applicant can submit a request to update an address or SmarTrip® number. SmarTrip is specific to the Washington, DC area and is not applicable to NGA. Any time SmarTrip is requested, enter NA.

1. Select the Address/ SmarTrip® radio button.
   a. Click the **Continue** button. The Change Address/ SmarTrip® page is displayed.

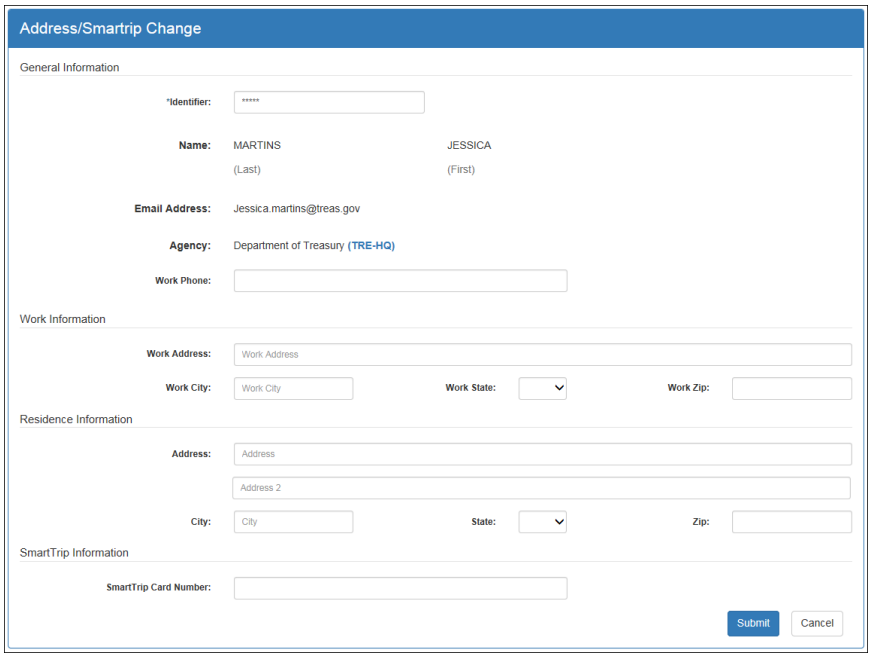


Figure 25: Change Address/ SmarTrip® page

   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.

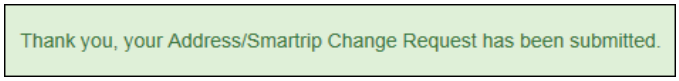


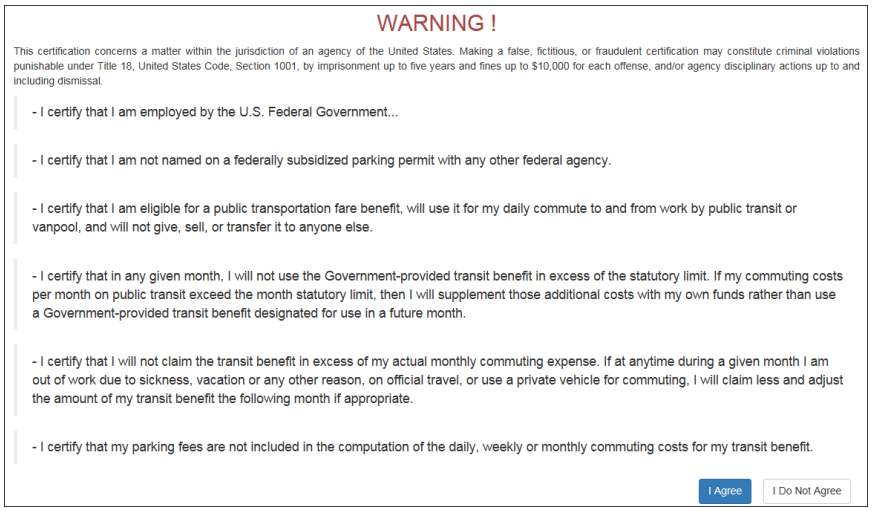
Figure 26: Address/ SmarTrip® Confirmation

Note: *The applicant must be enrolled in the Transit Benefit Program to change address/ SmarTrip® information. Registering a user name 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 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.

I Agree | I Do Not Agree

Figure 27: 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.*

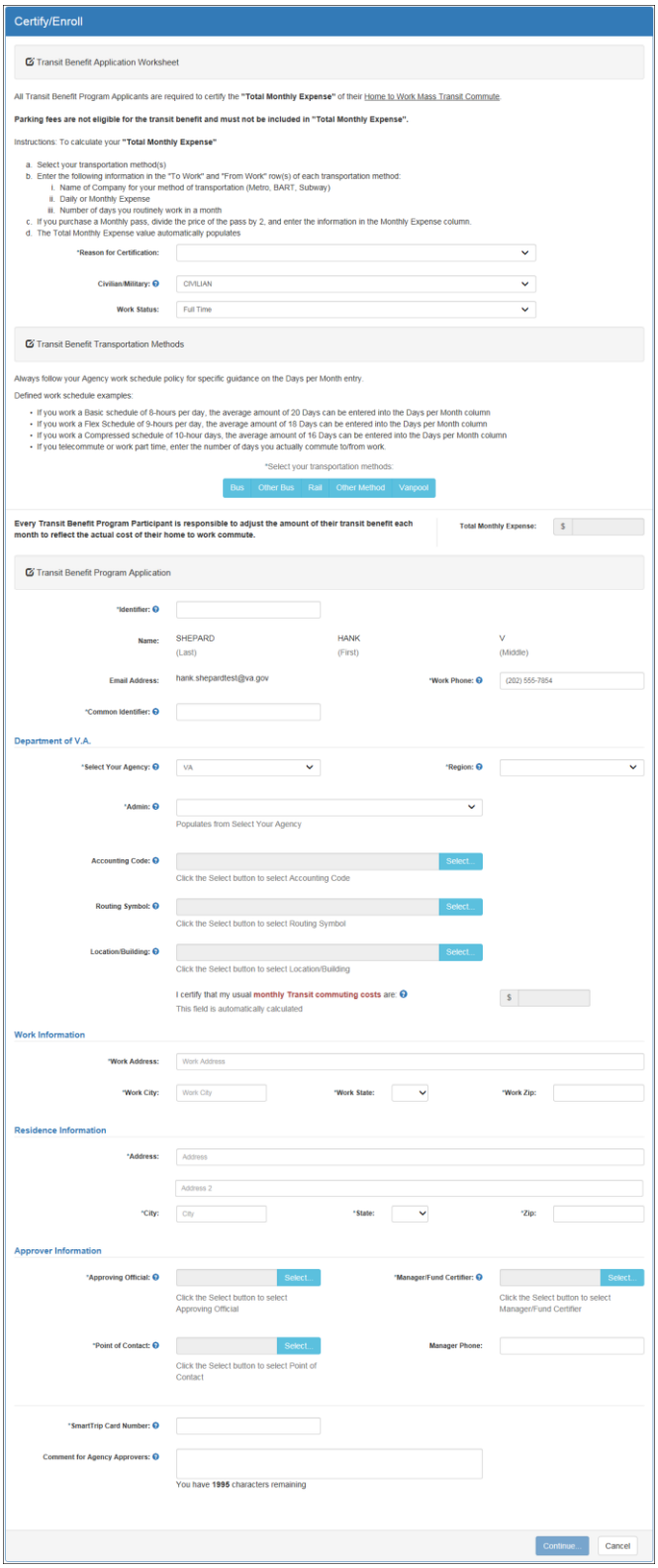


Figure 28: Transit Benefit Application Worksheet

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

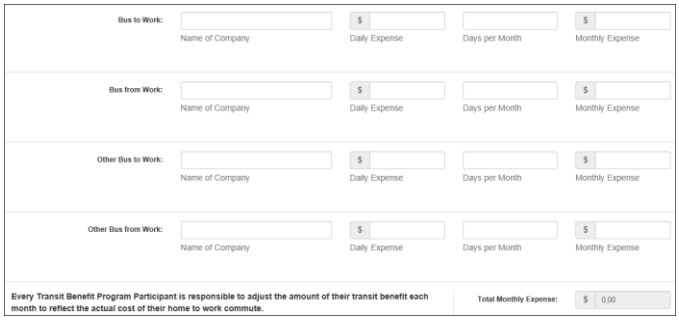


Figure 29: Bus Method

- Other Bus

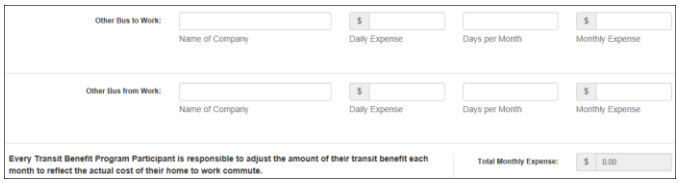


Figure 30: Other Bus Method

- Rail

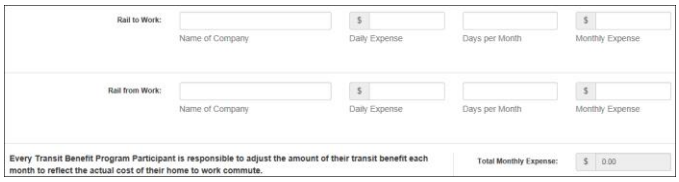


Figure 31: Rail Method

- Other Method

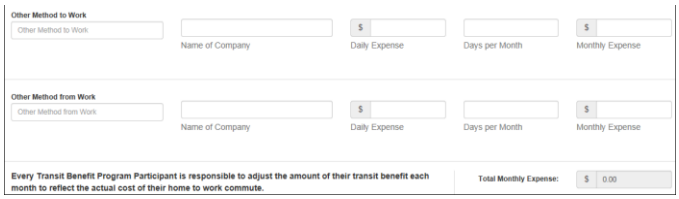


Figure 32: Other Method

- Vanpool

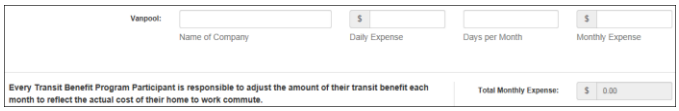


Figure 33: Vanpool Method

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.*

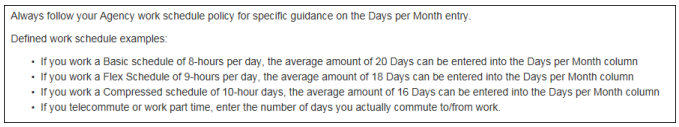


Figure 34: Sample Agency Work Schedule Policies

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

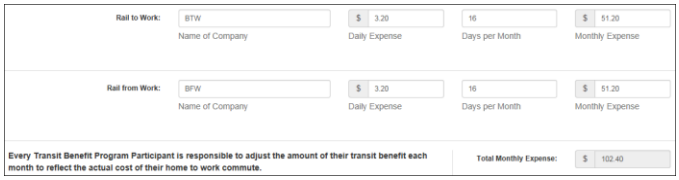


Figure 35: Method of Transportation Table

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

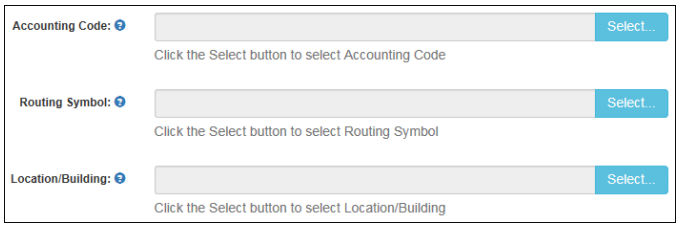
f. Enter the Identifier. This may be the last four digits of your social security number, your employee identification number or another indicator specified by your Agency. If not sure, you may check the help menu.

g. Enter the Common Identifier. This is information used to activate the TRANServe Card. The card activation key may be a word phrase or number. If not sure, you may check the help menu.

h. Select the Region closest to your physical work location

i. Select the Admin.

j. Depending on the Agency three optional fields may be displayed (i.e. Accounting Code, Routing Symbol, and Location/Building).). For NGA these fields are not used.



k. Enter your Work Information.

l. Enter your Residence Information. (The address from which you routinely commute)

m. Click the **`Select`** button to display the list for your agency's 1st Approvers (Supervisors).

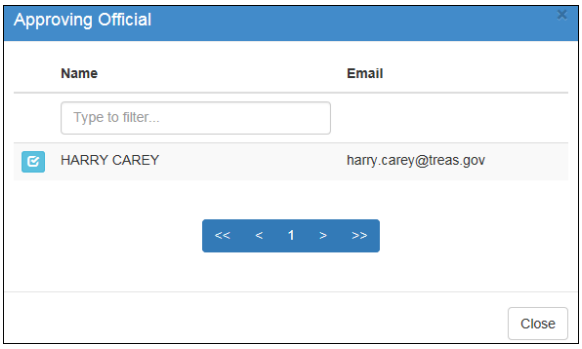


Figure 36: 1st Approver/Supervisor

n. Select your 1st Approver/Supervisor. (Check the help menu to clarify)

o. Click the **`Select`** button to display the list for your agency's 2nd Approvers / Workforce Support Center. (Check the help menu to clarify)

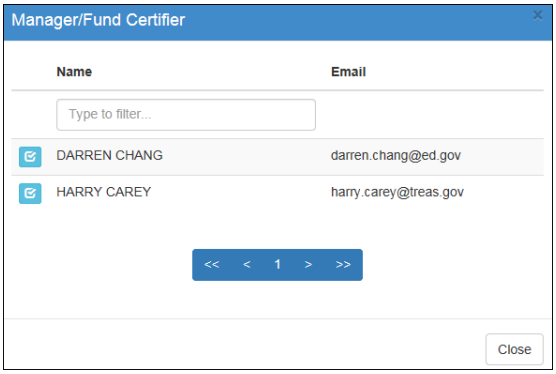


Figure 37: 2nd Approve/Workforce Support Center r

p. Select your 2nd Approver (Workforce Support Center).

q. Click the **`Select`** button to display the list for your agency's Points of Contact.

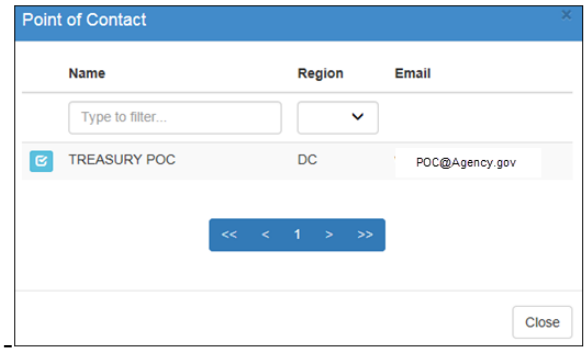


Figure 38: Points of Contact

r. Select your Point of Contact.

s. Enter NA for SmarTrip® card information.

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

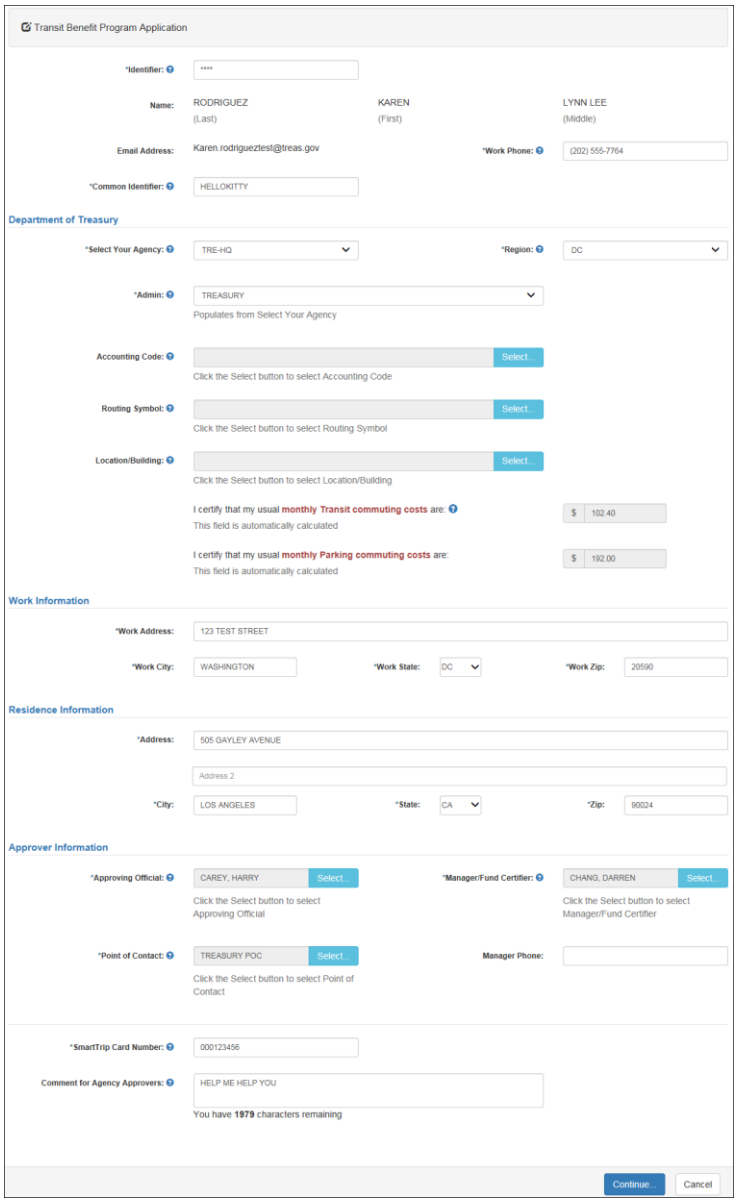


Figure 39: Completed Transit Benefit Application

u. Click the **`Continue`** button. The SmartBenefits® Program page is displayed. SmartBenefits is not applicable to NGA. Please skip the next step and select NO Thank You.

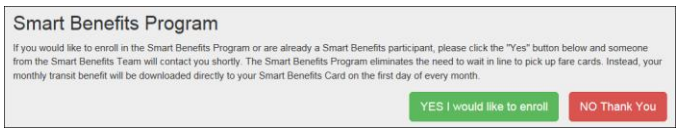


Figure 40: SmartBenefits® Program page

v. 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®)

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

Note: *Your Name, Email Address, Work Phone, and Agency/Mode are pre-populated with the information you entered when you registered. Verify that the information is correct.*

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

Figure 41: Transit Benefit Program Confirmation

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

3.1.5 Disapproved Applications

Applications that have been Disapproved are sent back to the applicant. The applicant must make 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.

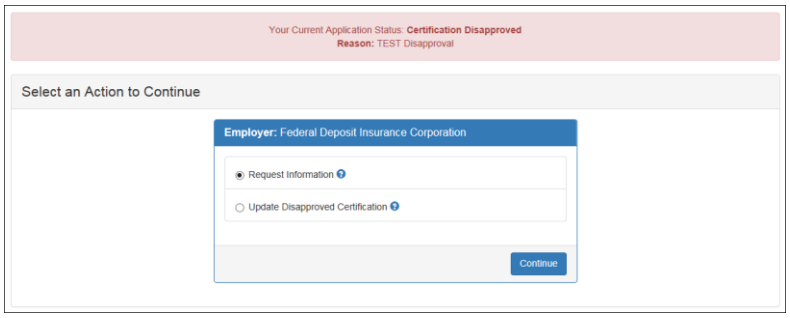


Figure 42: Select An Action To Continue page

a. Select the Update Disapproved Application radio button.

b. Click the **Continue** button. The Warning page is displayed.

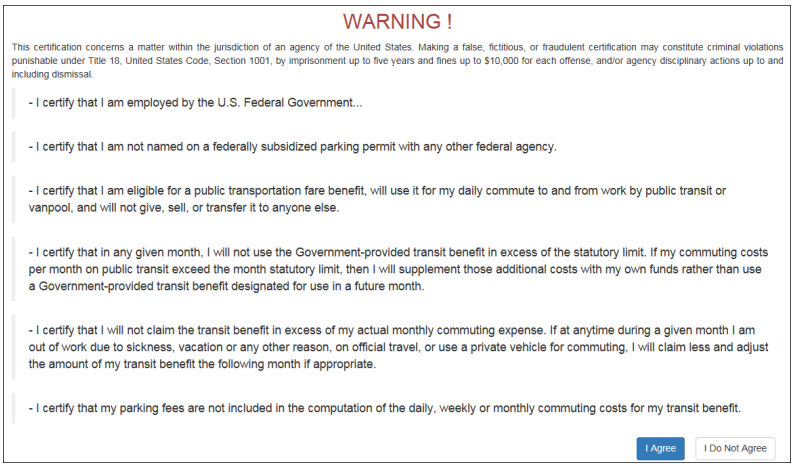


Figure 43: Warning page

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.*

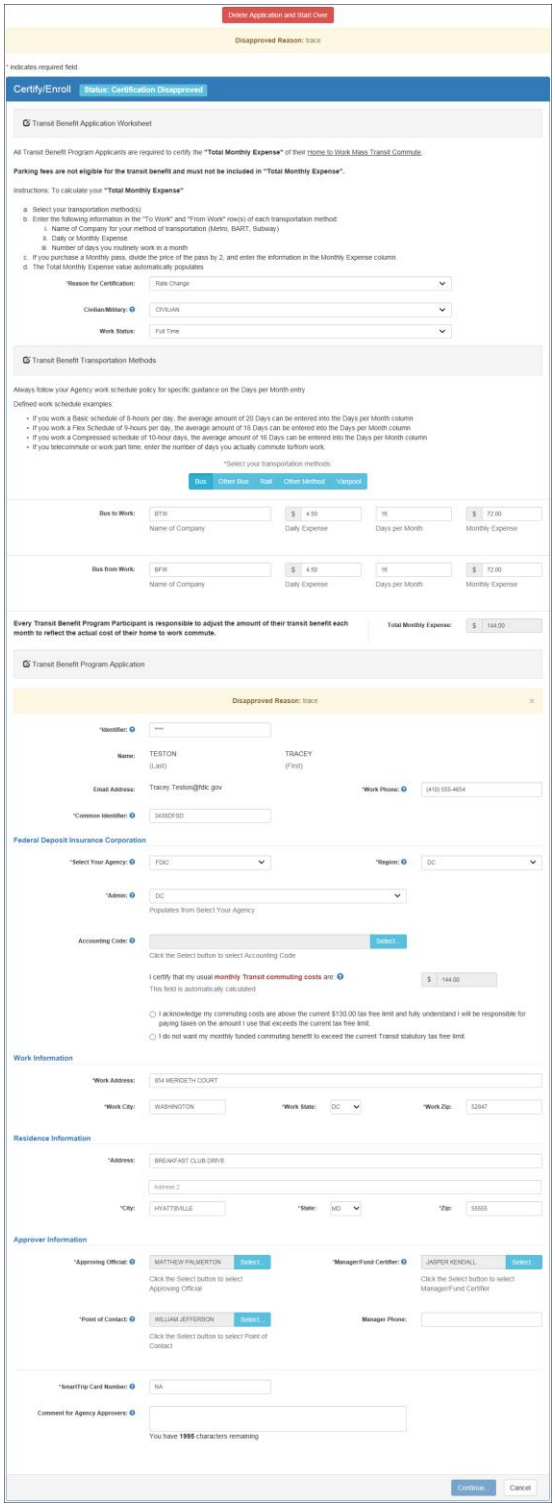


Figure 44: Disapproved Transit Benefit Application Worksheet

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.

  d. 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.

4. APPROVAL SECTION

The Approval Section allows the authorized user to view, approve or disapprove a transit benefit application. The user must be a 1st Approver, for instance a Supervisor, Approval Officer, or Approval/Supervisor (a combination of the 1st and 2nd Approvers), 2nd Approver, for instance a Manager/Fund Certifier or a 3rd Approver (Program Admin) within the agency to which the application is being submitted. These roles are assigned by the TRANServe Transit Benefit Manager assigned to the Agency or the Agency Transit Benefit Program Office.

Note: *Approvers are unable to view or approve their own transit benefit application in an approval queue. 1st and 2nd Approvers will only see an application on which an employee has chosen their name.*

4.1 Approval Process

1. Log on as an approver.
   a. From the Home page, click the **`Approval Section`** button; approval page is displayed.

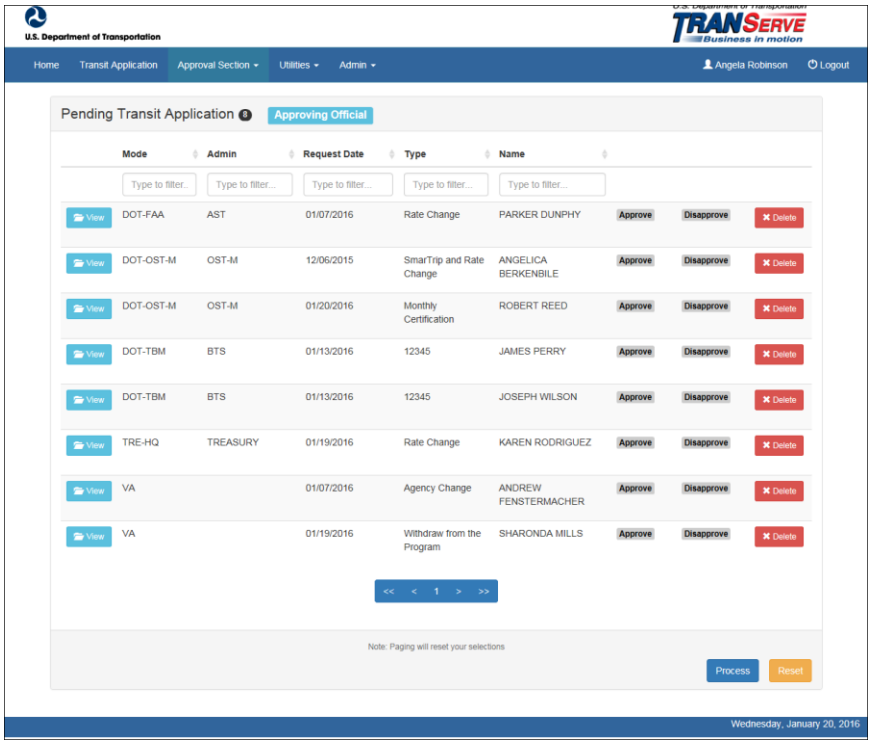
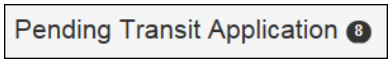


Figure 45: Approval page

The number of applications awaiting review and approval is displayed next to the page title.



   b. Review according to your Agency Policy, and then select Approve to approve the application. After the selection is made the label will change into a checkmark.

c. Review according to your Agency Policy then select Disapprove to disapprove the application. After the selection is made the label will change into a checkmark.

- A reason is required when an application is disapproved. Enter a reason in the Reason textbox. Where possible give instructions for correction. (i.e. Correct Supervisor's name)

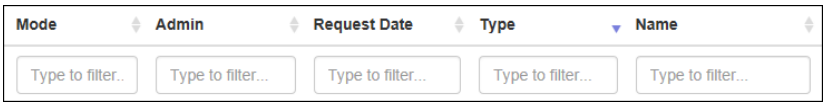
The number of applications approved or disapproved is displayed next to the **`Process`** button.

d. Click the **`Process`** button to approve or disapprove the application.

Note: *Applications can be reviewed, approved or disapproved on the Transit Benefit Worksheet/Application page by clicking the* **`View`** *button for the desired applicant.*

Note: *Applicants can be filtered by entering in the first few letters of the Mode (Agency Name), Admin, Type, and Name. To filter by date, enter in the date the application was submitted in the Request Date filter textbox.*

Note: *Click the column header, and then click the arrow next to the column header to sort applicants in ascending or descending order.*



Note: *To access the additional Approval Section menu options from a mobile device; click the additional menus button at the top of the page. Click the Approval Section dropdown arrow to display the sub-menus. Click the sub-menu to enter the appropriate Approval Queue to review an application.*

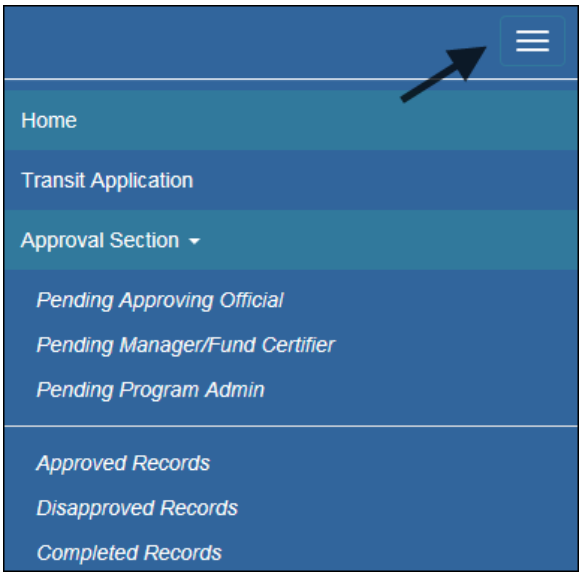


Figure 46: Approval Section Menu Options

4.1.1 Delete Application

Note: *In most cases the applicant should delete their application to begin again. There are times when an approver will need to delete an application. (i.e. an employee separates and the application is still attached to an approver queue, sending the approver reminders.)*

1. Click the **`Delete`** button. The Delete Confirmation is displayed.

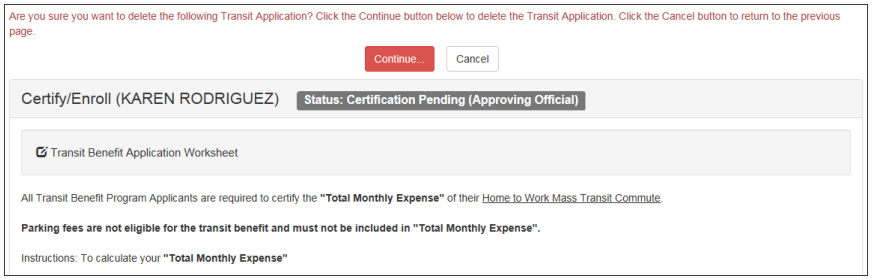


Figure 47: Delete Confirmation page

   a. Click the **`Continue`** button to delete the application. The approval page is re-displayed with the delete confirmation at the top of the page.

Note: The submitted application will be deleted and the applicant will need to resubmit an application for transit benefits.

4.2 Approved/Disapproved/Completed Records

- From the Home page; hover over the Approval Section menu option. Select the type of records to be viewed by selecting the link name. (Approved, Disapproved or Completed)

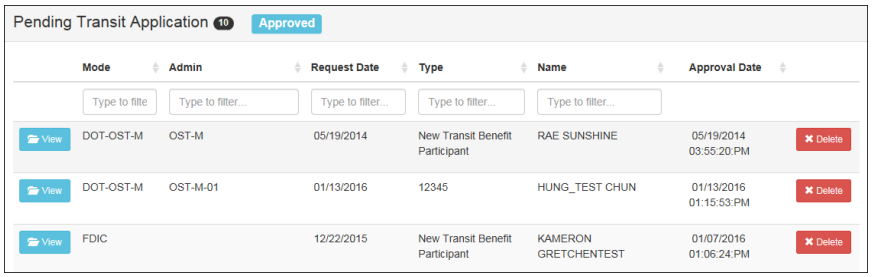


Figure 48: Approved Records

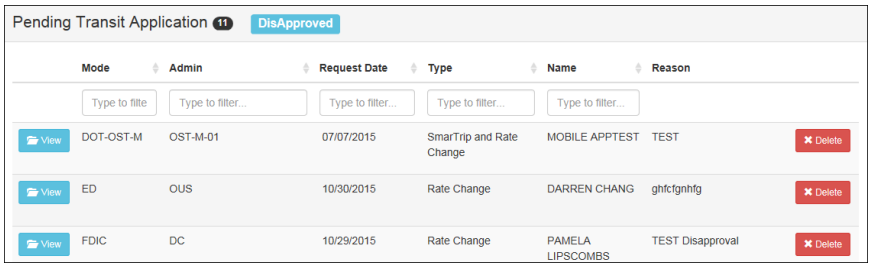


Figure 49: Disapproved Records

- When the Completed Records link is selected; the Find Completed Applications page is displayed. Enter a First Name, Last Name, or select an Agency/Mode from the dropdown to limit the search results. Click the **`Search`** button to return all completed records.

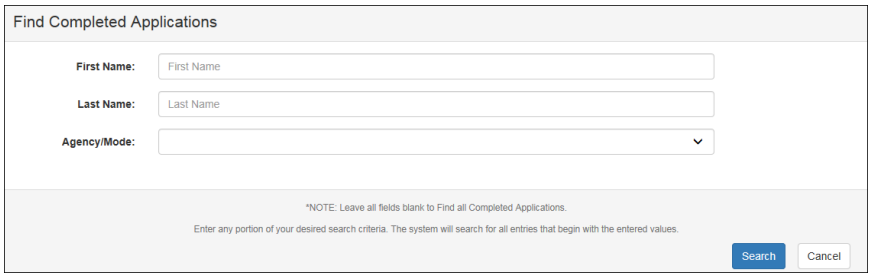


Figure 50: Find Completed Applications page

Note: *Enter at least one search criteria. If no search criteria are entered the system will retrieve and display all completed records. This load may be quite time consuming.*

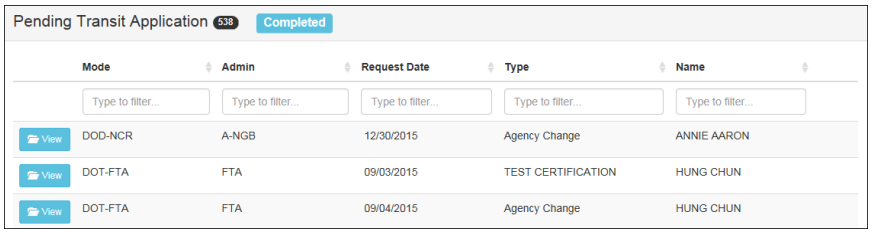


Figure 51: Completed Records

5. ADMIN

The Admin function allows the Program Office to update users to 1st or 2nd Approver.

Note: *To access Admin menu options from a mobile device; click the additional menus button at the top of the page. Click the Admin dropdown arrow to display the sub-menus.*

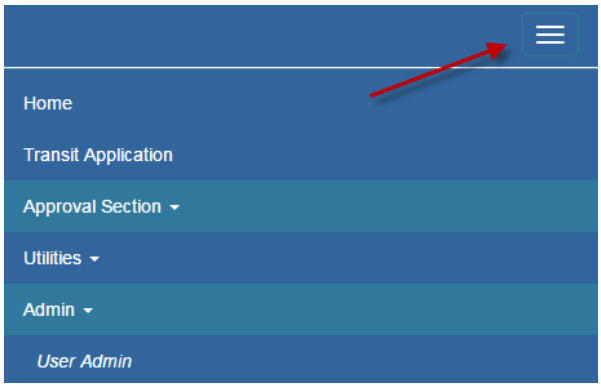


Figure 52: Admin Menu Options

5.1 User Admin

1. Mouse over the Admin menu bar; select the User Admin option. The Find Users page displays.

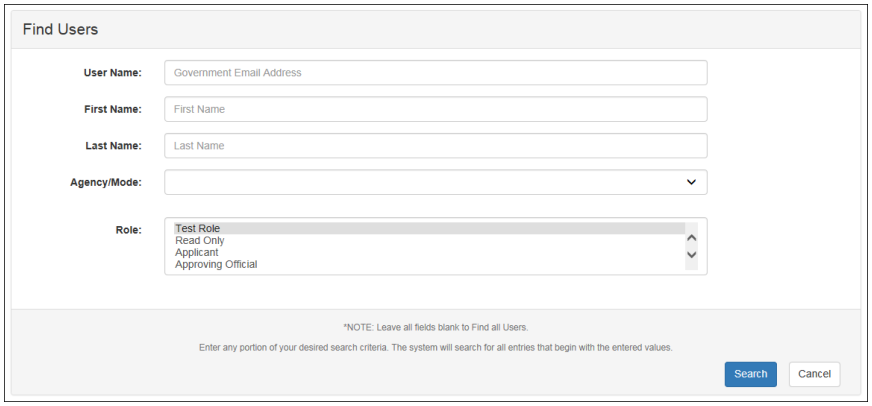


Figure 53: Find Users page

   a. To search for an existing user; enter the User name, First Name, Last Name, or select an Agency/Mode or Role from the dropdown menu.
   b. Click the **`Search`** button. The Search Results page displays.

Note: *At least one search criteria field should be entered; if no search criteria are entered the system will retrieve and display all users. This load may be quite time consuming.*

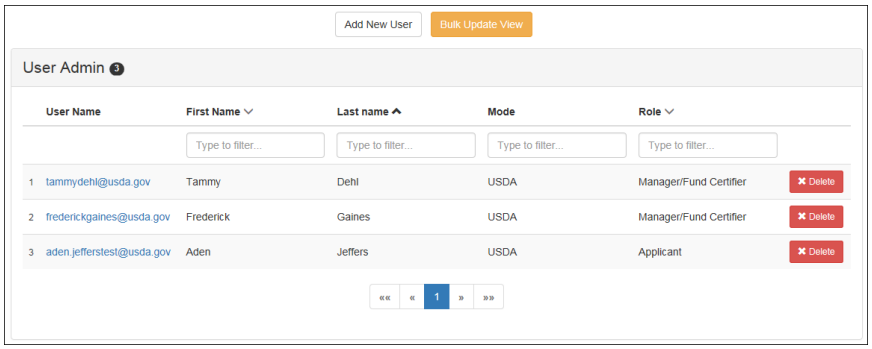


Figure 54: Users Search Results page

Note: *Applicants can be filtered by entering in the first few letters of the Mode, First Name, Last Name, and Role.*

5.1.1 Add User

1. From the User Admin page; click the **`Add New User`** button. The Account Information page displays.

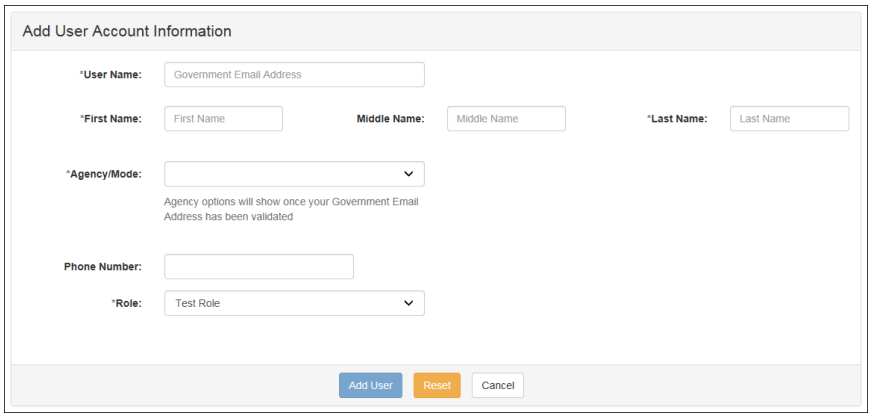


Figure 55: Add User Account Information page

   a. Enter the applicant's official government email address in the User Name textbox.
   b. Complete the account information form.
   c. Select the user role from the Role dropdown.
   d. Click the **`Add User`** button. The Add User Confirmation displays.

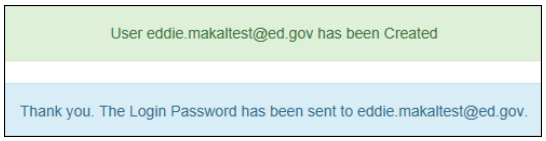


Figure 56: Add User Confirmation

Note: * *indicates required field.*

Note: *The agency used in the email for the user name will determine the agency names displayed in the Agency dropdown.*

Note: *This page can also be accessed by hovering over the Admin menu option and clicking the Add New User sub-menu option. In most cases <u>all users should create their own profile</u> using the Registration*

process on the login page. When an Admin creates a new user, they also create a communication chain to inform and educate the user to obtain the password through their official government email address. This slows the process and also defeats the control point of the user providing all certified information.

5.1.2 Update User

1. From the User Admin page; click the *User name* link. The Update User Account Information page displays with the applicant's information.

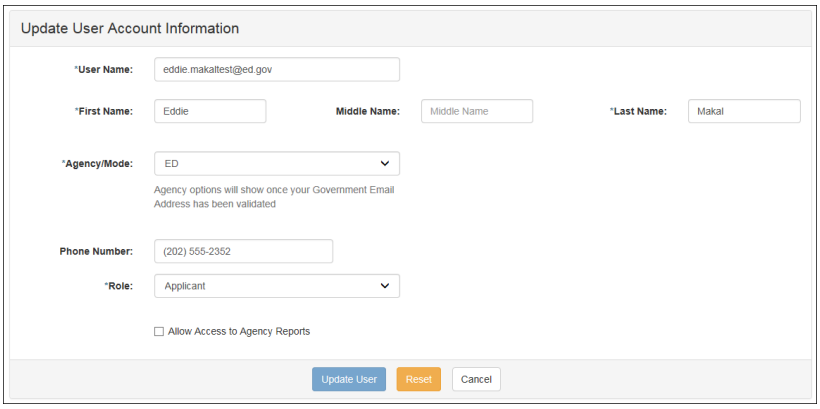


Figure 57: Update User Account Information page

   a. Update the applicant's user information.
   b. Click the **`Update User`** button. The Update User Confirmation displays.

Figure 58: Update User Confirmation

Note: * *indicates required field.*

Note: *After the Add User button is clicked the page re-displays as the Update User Account Information page. Updates can be made on this page.*

5.1.3 Delete User

1. From the User Admin page; click the **`Delete`** button. The Confirm Delete message displays.

Figure 59: Confirm Delete Message

   a. Click the **`Delete`** button to confirm deletion. The Delete Confirmation is displayed.

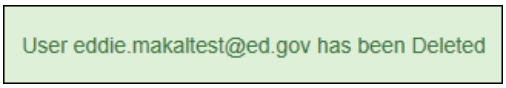


Figure 60: Delete Confirmation

5.1.4 *Bulk Update View*

The Bulk Update View allows the administrator to update multiple user roles at one time.

1. From the User Admin page; click the **`Bulk Update View`** button. The Bulk Update View page displays.

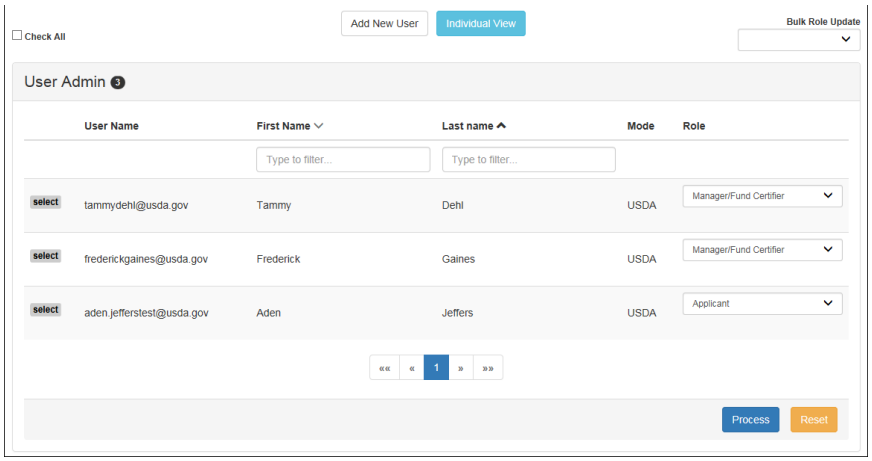


Figure 61: Bulk Update View page

5.1.4.1 Single User Role Update

1. Click the **`Select`** button next to the user name. The button changes to a check mark after it is selected.

Figure 62: Single User name Select

a. Click the down arrow for the User Role dropdown menu.

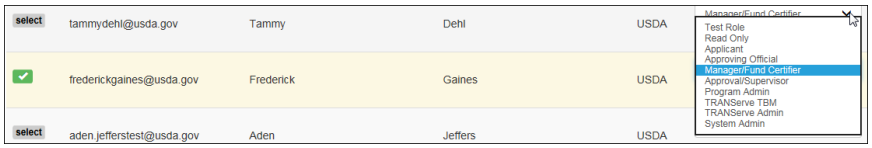


Figure 63: Role Change Select

b. Select the desired user role from the dropdown menu.

Figure 64: Role Update

c. Click the **`Process`** button. The Confirm Bulk Update message is displayed.

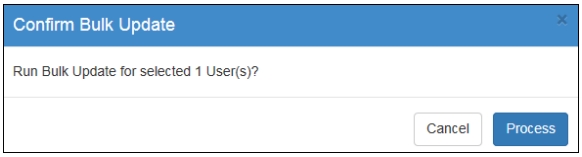


Figure 65: Confirm Bulk Update Message

d. Click the **`Process`** button to confirm the update and close the dialog box. A confirmation message is displayed at the top of the page.

Figure 66: Role Update Confirmation

Note: *If the user is associated with an Agency that has multiple Modes/Agency Names, the Mode can be updated using the same steps used to update the User Role.*

Figure 67: Multiple Modes

5.1.4.2 Multiple User Role Update

1. Click the **`Select`** button next to the user names. The button changes to a check mark after it is selected.

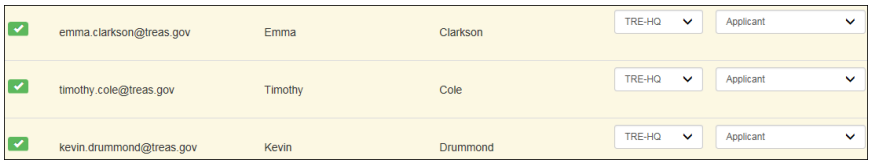


Figure 68: Multiple User name Select

a. Click the down arrow for the Bulk Role Update dropdown menu at the top of the page.

Figure 69: Bulk Role Update Select

b. Select the desired user role from the dropdown menu.

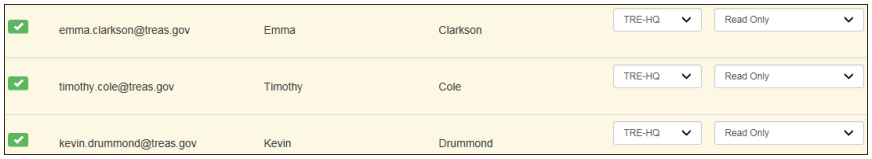


Figure 70: Bulk Role Update

c. Click the **`Process`** button. The Confirm Bulk Update message is displayed.

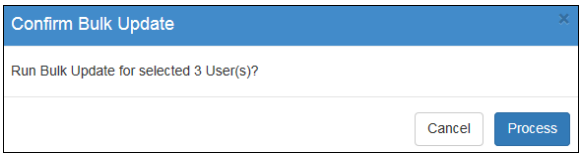


Figure 71: Confirm Bulk Update Message

d. Click the **`Process`** button to confirm the update and close the dialog box. A confirmation message is displayed at the top of the page.

Note: *Program Admins can only update user roles below the Program Admin level within their Agency.*

TRANServe Admins can only update user roles below the TRANServe Admin level.

TRANServe Transit Benefit Managers can only update user roles below the TRANServe TBM level.

5.1.4.3 Role Update Lock

Approvers that have applications in pending status cannot have their roles updated. This will ensure that applications are not orphaned when user roles are changed. This includes applications that are anywhere in the approval process. The number of pending applications is displayed in place of the **`Select`** button.

Figure 72: Pending Application Link

1. Click the number next to the user name to display the Pending Transit Benefit Application Status page.

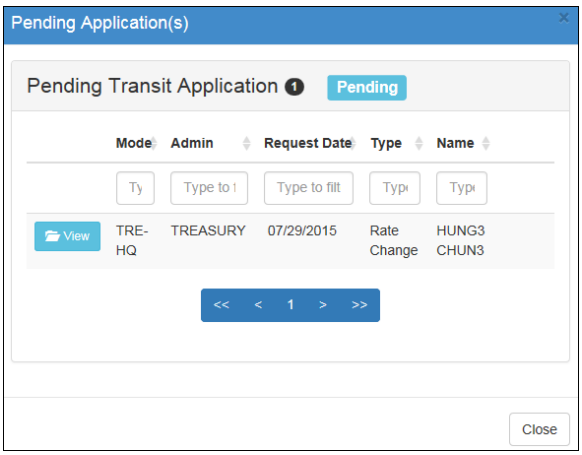


Figure 73: Pending Transit Benefit Application Status page

a. Click the **`View`** button next to the applicant's name. A confirmation message is displayed. Click the **`OK`** button.

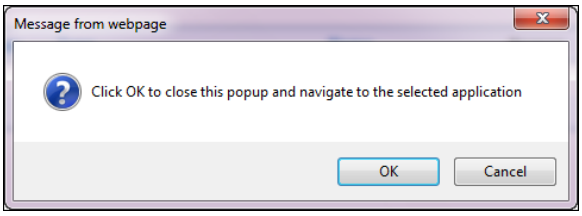
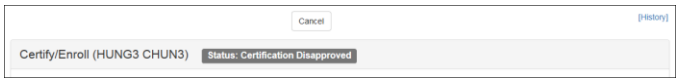
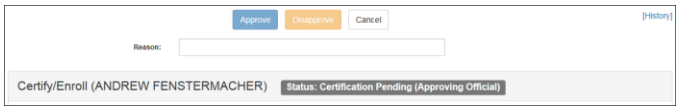


Figure 74: Open Application Confirmation Message

The application is opened. If the status is at the final approving level the application is approved and will display the status at the top of the page (i.e. CERTIFICATION DISAPPROVED or WITHDRAWAL APPROVED).



If the application needs further approval the buttons will display at the top of the page along with the pending certification level.