TRANSIT BENEFIT PROGRAM

APPLICATION SYSTEM

GSA 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

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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 Main Coordinator

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

Role	Name/Phone	Title	Email
Main Coordinator	National Program Manager Alexandra Sabbers	Main Coordinator	gsa-transit-subsidy@gsa.gov

ALL FIRST TIME USERS MUST BE REGISTERED IN THE SYSTEM, INSTUCTIONS BELOW.

2. ACCESSING THE TRANSIT BENEFIT APPLICATION

2.1 Login Screen

Use the following steps to access the application:

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

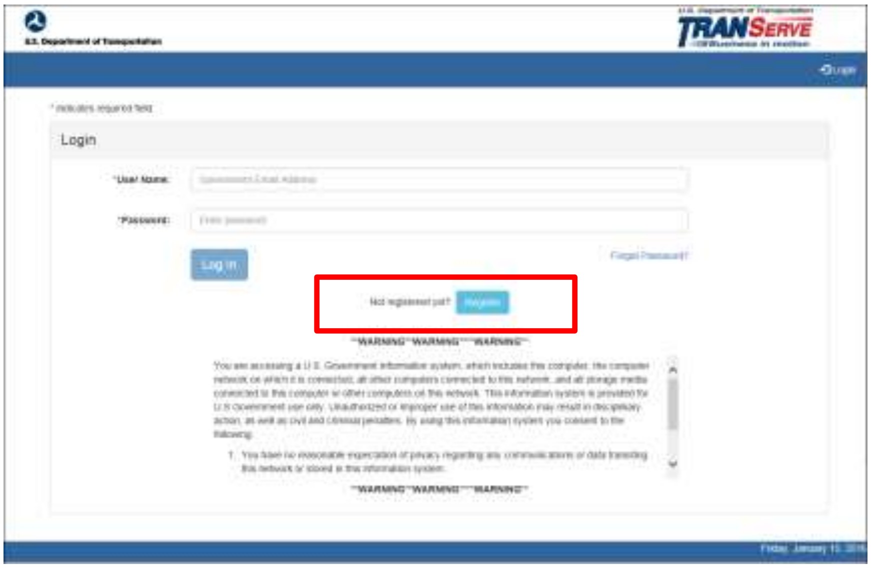


Figure 1: Transit Benefit Application Log In page

First time users must register. Use the following steps:

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

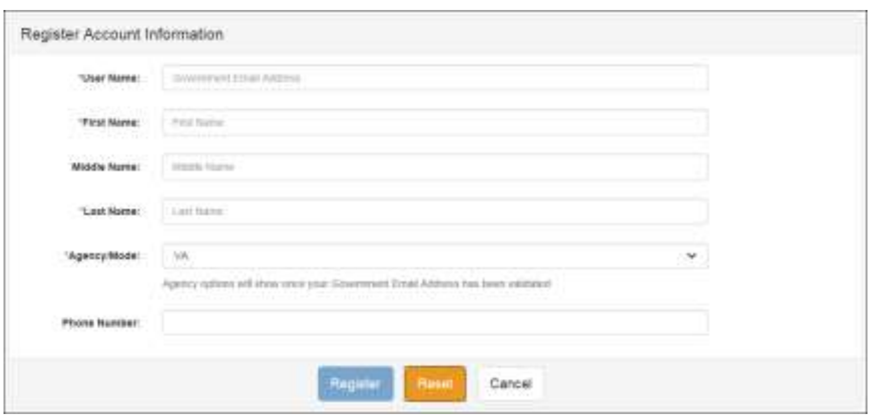


Figure 2: Register Account Information page

Note: * *indicates required field.*

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

Complete the registration form.

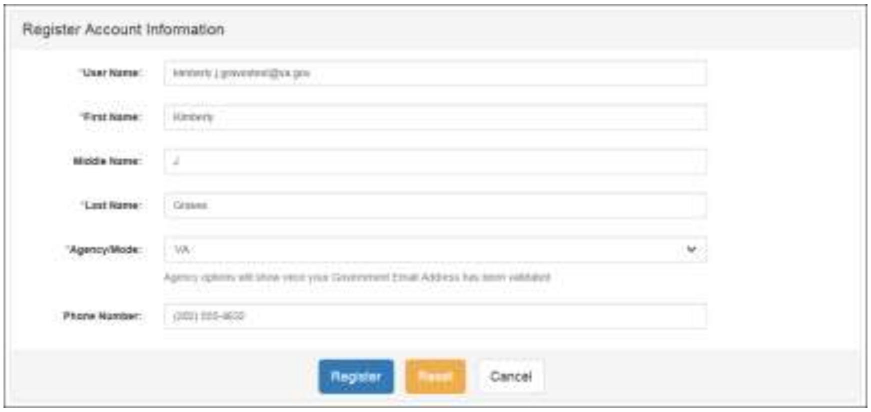


Figure 3: Completed Registration page

Note: *The agency domain name used in the email for the username will determine the agency choices displayed in the Agency dropdown list.*

Click the **`Register`** button.

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:

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

Enter the temporary password in the Password textbox. DO NOT include extra spaces!

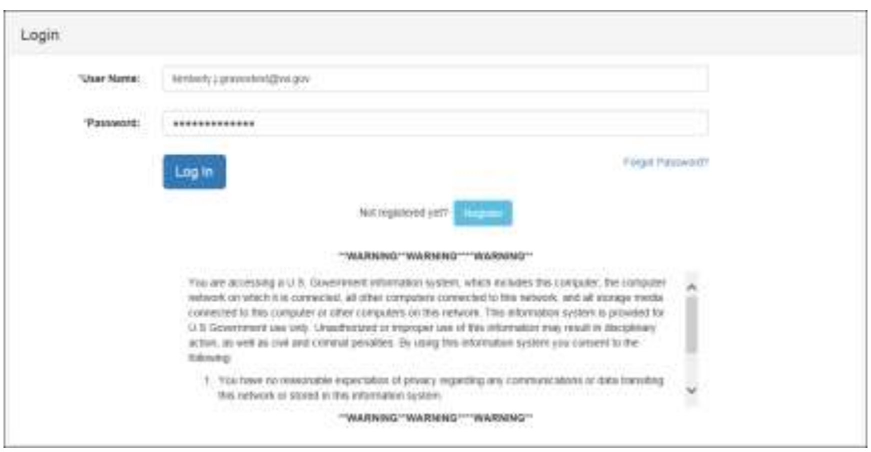


Figure 5: Log In page

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

The Change Password page displays.

Change Password- Read instructions before beginning to create password.

After logging into the application for the first time, you are required to change the password to something that you will easily remember.

Enter the temporary password in the Current Password textbox.

Figure 6: Change Password page

Enter your new password in the Create New Password textbox.

Minimum 12 characters

Complexity: minimum of 1 uppercase, 1 lowercase, 1 number, 1 special character

Do *not* use two characters consecutively. Ex: pa**ss**word, ***22***, ***##***

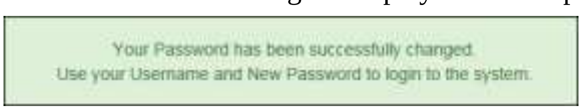
Reenter your new password in the Reenter New Password textbox.

Enter a hint to remind you of your password in the Create a Hint textbox.

Click the **`Submit`** button.

Note: * *indicates required field.*

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



Supervisors only: After registration is complete, please send an email to National Program Manager at gsa-transit-subsidy@gsa.gov to have you elevated to a supervisory role. Use the "Request Information" portal to send National Program Manager an email with the request- Please elevate my role to supervisor, I have completed the registration in the online system. See instructions on page 8 below, 3.1.1 Request Information.

Participants, if you are getting errors when attempting to select a supervisor during your application process but you know your supervisor has completed registration, please contact National Program Manager at gsa-transit-subsidy@gsa.gov *to ensure that your supervisory is registered and can elevated in the system.*

Maintenance*: Use the "Forgot Password" link at the log-in screen to reset your password. Please do not contact DOT or your Regional Coordinator for this function – it can be performed only by the user. The system will generate an email with a new temporary password.*

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

2.2 Password Recovery

Use the following steps to recover your password.

From the Login page; click the *Forgot Password?* Link. The Forgot Password page displays.

Figure 9: Forgot Password page

The Show Hint section allows the user to view the Hint entered when the password was last changed. Enter the username and click the **`Show Hint`** button.

- The Forgot Password page is redisplayed with the Hint and allows the user to log in from this page.

Figure 10: Show Hint

Send It By Email allows the user to retrieve a temporary password through email. The password is sent to the email address entered when the account was created. Enter your username and click the **`Submit`** button.

Note: ** indicates required field.*

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

2.3 My Account

My Account allows the user to update personal information.

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.

Click the **`Update`** button to save the changes. The account information is updated and the Home page is displayed with a confirmation message at the top of the page.

User kimberly.j.gravestest@va.gov has been Updated

Figure 12: Update My Account Confirmation

Note: You can update your account information at any time by using the above steps after clicking the **`My Account`** button on the Home page. The My Account page can also be accessed from the Utilities dropdown menu located on the Menu bar at the top of the Home page.

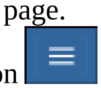
Note: To access the additional Utilities menu options from a mobile device; click the additional menus button at the top of the page. Click the Utilities dropdown arrow to display the sub-menus.

Figure 13: Utilities Menu Options

2.4 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.

2.5 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.

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.

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.

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.

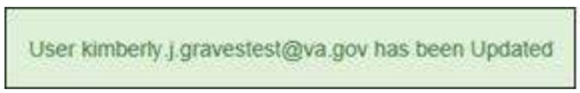


Figure 12: Update My Account Confirmation

Proxy Feature

Use the following steps to select a temporary (short term, during time out of the office due to vacations, short term leave), email National Program Manager at gsa-transit-subsidy@gsa.gov for permenant or a long term proxy:

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

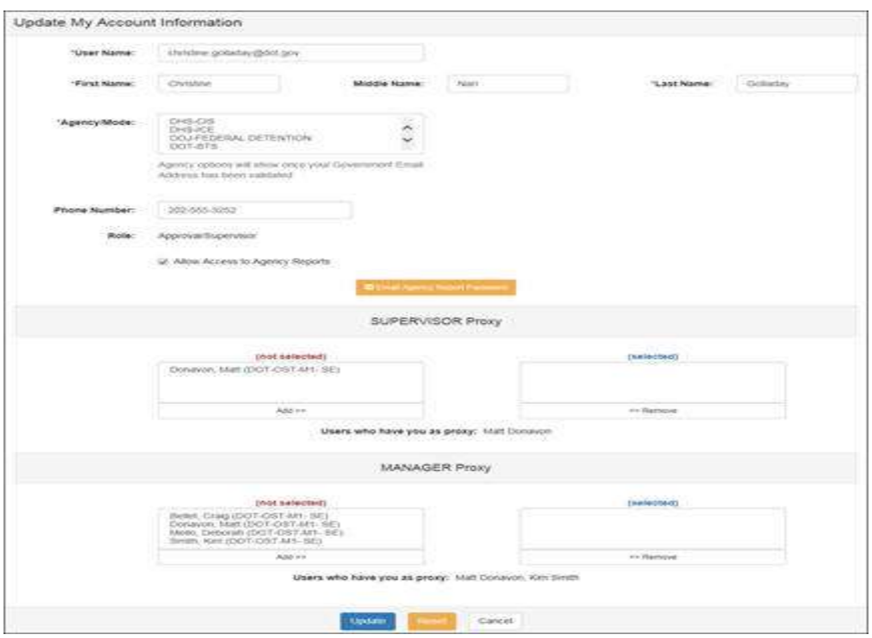


Figure 13: Update My Account Information (Proxy)

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.

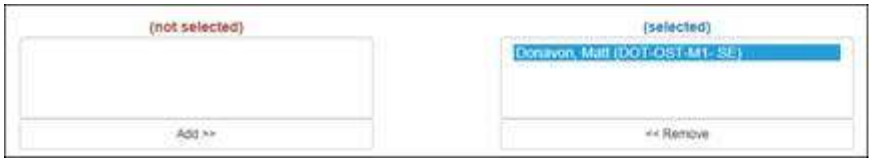


Figure 14: Selected Proxy

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

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, Transit Coordinators, 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, Transit Coordinators, 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.

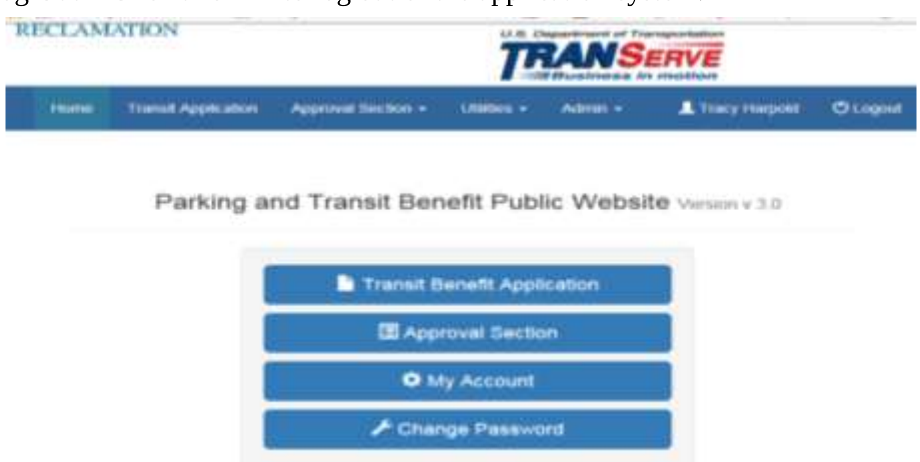


Figure 14: Website Home page

Note: *To access the additional menu options from a mobile device; click the additional menus button at the top of the page. The additional menu options are displayed.*

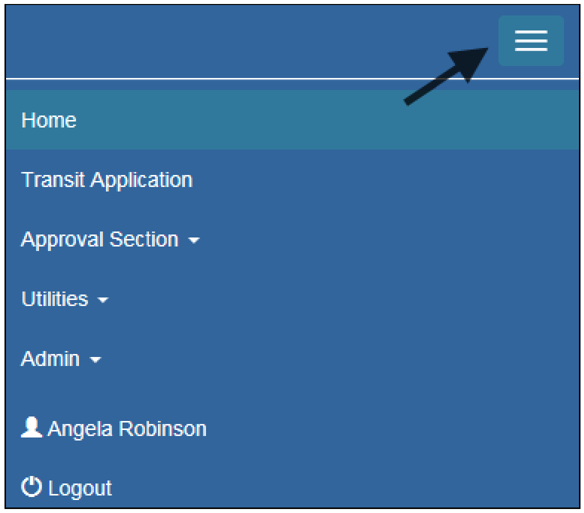


Figure 15: Additional Menu Options

3.1 Transit Benefit Application

The Transit Benefit Application option allows the applicant to request information, withdraw from the program, make address and SmarTrip® changes, and to certify/enroll in the transit benefit program.

From the Home page; click the **`Transit Benefit Application`** button. The Select An Action To Continue page displays.

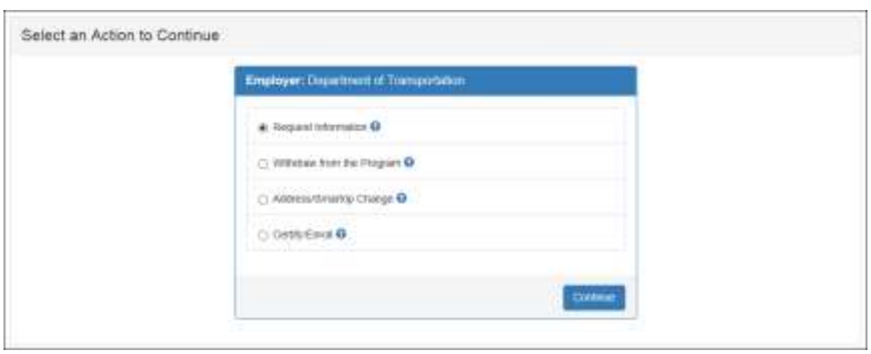


Figure 16: Select An Action To Continue page

3.1.1 Request Information

The applicant can request information from the Transit Coordinator by submitting questions regarding the transit benefit program or a submitted application through the Transit Cordinator.

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

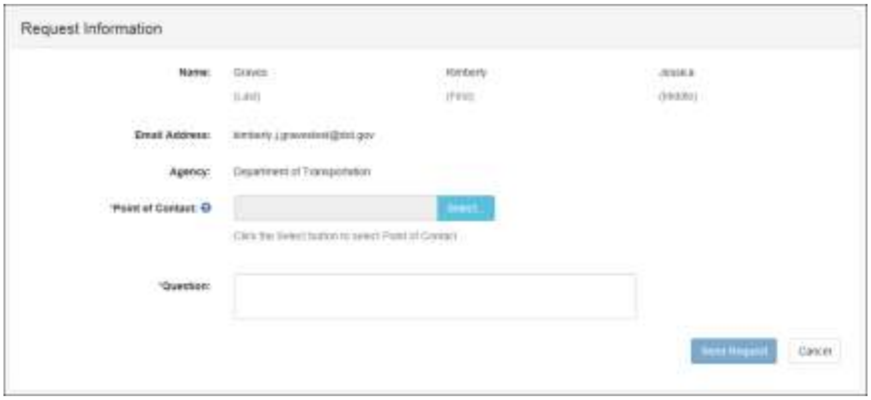


Figure 17: Request Information page

If a Transit Coordinator-*(Point of Contact field)* has been selected it will pre-populate in the Transit Coordinator-*(Point of Contact field)* textbox. To select a Transit Coordinator, click the **`Select`** button to display the available Transit Coordinator in a separate window.

Select a Transit Coordinator from the list. This is also helpful if a Supervisor or Transit Coordinator needs to locate a Transit Coordinator in another region.

Enter the question or concern in the Question textbox and click the **`Send Request`** button.

An email is sent to the selected Transit Coordinator. The Home page is displayed with a confirmation message at the top of the page.

Figure 18: Request Information Confirmation

3.1.2 Withdraw from the Program

The applicant can submit a request to withdraw from the program at any time.

Select the Withdraw from the Program radio button.

Click the **`Continue`** button. The Withdraw From The Program page is displayed.

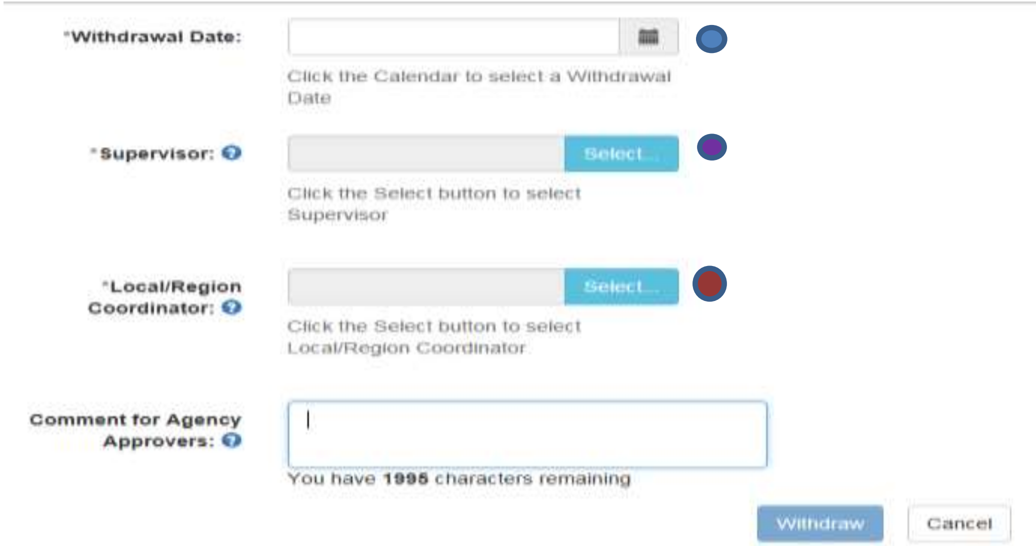


Figure 19: Withdraw From The Program page

Click the pop up calendar to select a withdrawal date.

Click the **`Select`** button to display the list for your agency's Supervisors.

Figure 20: Supervisor (1st Approver)

Click the **`Select`** button to display the list for your agency's Transit Coordinator.

Figure 21: Transit Coordinator

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

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

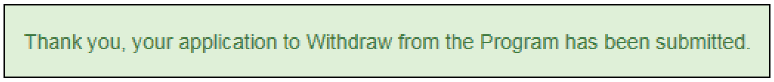


Figure 22: Withdraw Confirmation

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

3.1.3 Address/SmarTrip® Change

The applicant can submit a request to update an address or SmarTrip number (Washington DC-Region only) **DO NOT ENTER DEBIT CARD NUMBER**

Select the Address/ SmarTrip® radio button.

Click the **Continue** button. The Change Address/ SmarTrip® page is displayed.

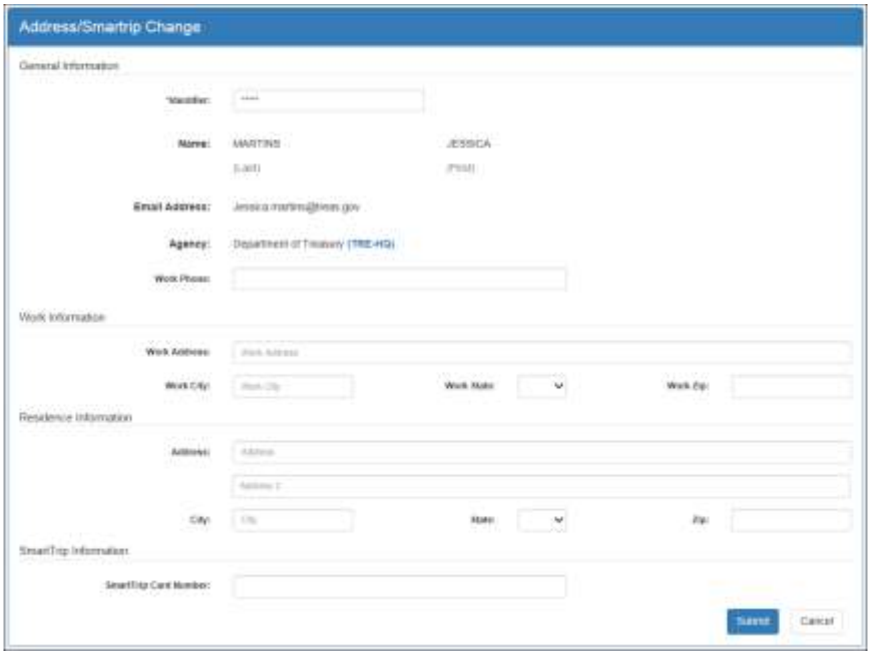


Figure 23: Change Address/ SmarTrip® page

Update the applicable information. Only update the section that needs to be changed. You are not required to complete an entirely new application.

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

Thank you, your Address/Smartrip Change Request has been submitted.

Figure 24: Address/ SmarTrip® Confirmation

Note: *The applicant must be enrolled in the Transit Benefit Program to change address/ SmarTrip® information. Registering a username does not mean that the applicant has enrolled in the program.*

3.1.4 Certify/Enroll

The Certify/Enroll allows the applicant to enroll in the transit benefit program by submitting an application.

Select the Certify/Enroll radio button.

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

Figure 25: Warning page

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: Transit Benefit Application Worksheet

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
- 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

Select your transportation method(s).

- Bus

Figure 27: Bus Method

- Other Bus

Figure 28: Other Bus Method

- Rail

Figure 29: Rail Method

- Other Method

Figure 30: Other Method

- Vanpool

Figure 31: Vanpool Method

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

Note: *When filling out the method of transportation table, be sure to follow your Agency's work schedule policies.*

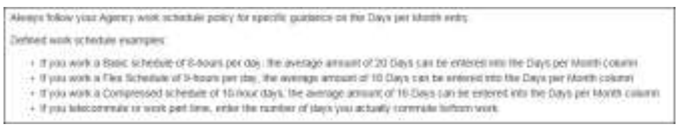


Figure 32: Sample Agency Work Schedule Policies

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

Enter the name of the Transit Authority-

If monthly pass is purchased indicate next to name of the Transit Authority- example: RTD Monthly, Marta-Monthly.

Enter Monthly cost

Enter number of days per month (max 20) you commute home/work

If daily pass is purchased enter in daily cost

Enter number of days per month (max20) you commute home/work

Figure 33: Method of Transportation Table

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

1. Enter the Identifier. Enter the last four digits of your social security number, specified by your Agency. If not sure, you may check the help menu.

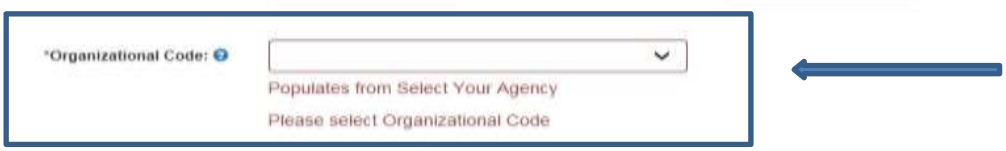
2. Enter the Common Identifier. This is information used to activate the TRANServe Card. The card activation key may be a word phrase or number. Use the question mark to see the suggested agency common Identifier.

Use the blue question mark next to each field for additional assistance.

3. Select the Region associated with your Transit Coordinator, refer to Regional Coordinators Master List on the Transerve.dot.gov/participants/gsa website.

4. Click the **`Select`** link to display a list of *Regional Codes* for your agency, must update this portion.

5. Organizational Code: Select from the drop down feature.



6. Enter your Work Information. (The address from which you routinely commute)
7. Enter your Residence Information. (The address from which you routinely commute)

Click the ***`Select`*** button to display the list of agency **Supervisors**. Only select your supervisor. Use the blue question mark next to each field for additional assistance.

Figure 34: Supervisor

Select your Supervisor, if you do not see your supervisor, click on the blue question mark for directions.

8. Transit Coordinator field: Click the ***Select*** button to display the list for your agency's **Transit Coordinators**, if you do not see your Transit Coordinator, click on the blue question mark for directions. Select your Transit Coordinator.

Figure 35: Transit Coordinator

9. Point of Contact field: Click the **Select** button to display the list for your agency's Regions. Refer to Regional Coordinators Master List on the Transerve.dot.gov/participants/gsa website. Select your Region.

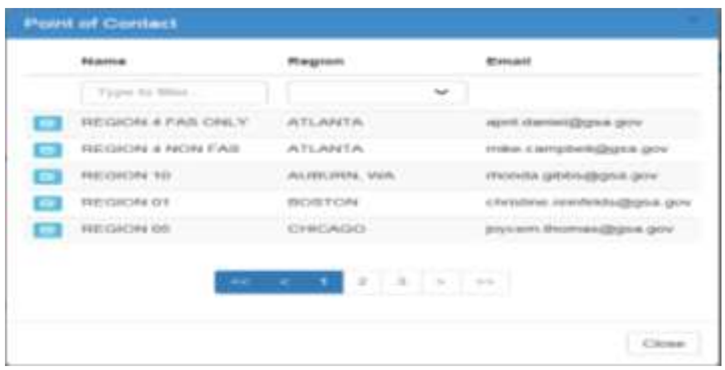


Figure 36: Points of Contact field

10. **For NCR participants – (Washington DC)** enter your Registered SmarTrip® card information. Please click on the ? to enter the correct format of card number. <u>All Regional or Debit Card participants enter **-NA**</u>. DO NOT ENTER DEBIT CARD NUMBER.

Type #1: 012345678 C3DW803 = **012345678**
Type #2: C3DW017 0020 0001 5644 364 6 = **015644364**
Type #3: GD1137 0167 0693 4564 7992 9601 = **01670693456479929601**

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

figure 37: Completed Transit Benefit Application

Click the **`Continue`** button. The SmartBenefits® Program page is displayed,if you have selected the box that indicates you are a SmartBenefits Participant.

Figure 38: SmartBenefits® Program page

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®)

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.*

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

Figure 39: 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.

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.

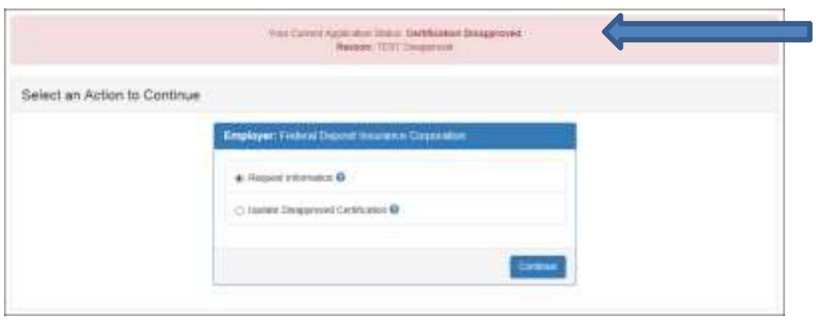


Figure 40: Select An Action To Continue page

Select the Update Disapproved Application button.

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

Figure 41: Warning page

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 42: Disapproved Transit Benefit Application Worksheet

- The reason the application was disapproved is displayed at the top of the Transit Benefit Application Worksheet and the Transit Benefit Program Application.
- The information the applicant entered when the application was submitted is displayed. Make the required corrections and resubmit the application by clicking the **`Continue`** button.

Click the **`Delete Application and Start Over`** button to delete the existing application. Doing this will revert the application back to the last submitted application. If this is your first application using this system, only the Profile information will display.

4. APPROVAL SECTION

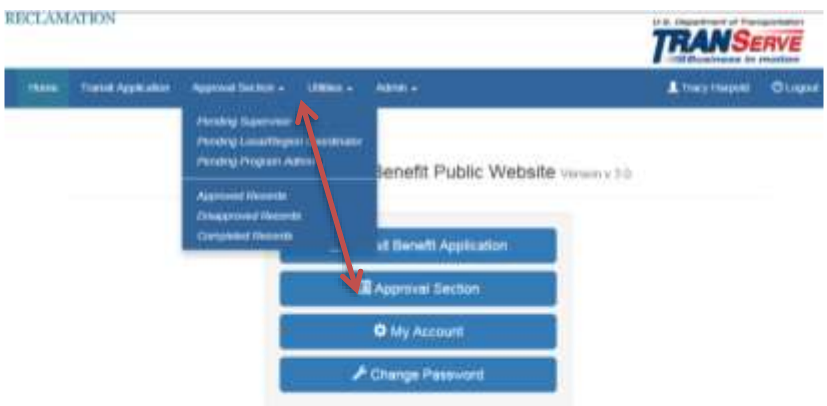
The Approval Section allows the authorized user to view, approve or disapprove a transit benefit application. The 1st Approver must be a **Supervisor**, the 2nd Approver must be a **Transit Coordinator**, within the agency to which the application is being submitted. These roles are assigned by the TRANServe 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

Log on as to approve applications.

Enter your approval section or queue, through either options:



Click on Pending Supervisor or Pending Transit Coordinator to open queue to display applications awaiting your approval.

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

2. The view below shows:

The agency

The date the application was submitted by participant

The reason the application was submitted

The name of the participant

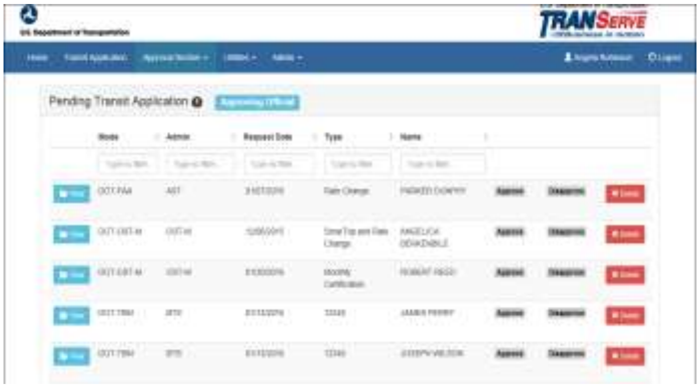


Figure 43: Approval page

Use the sort feature to help you locate applications.

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

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.*

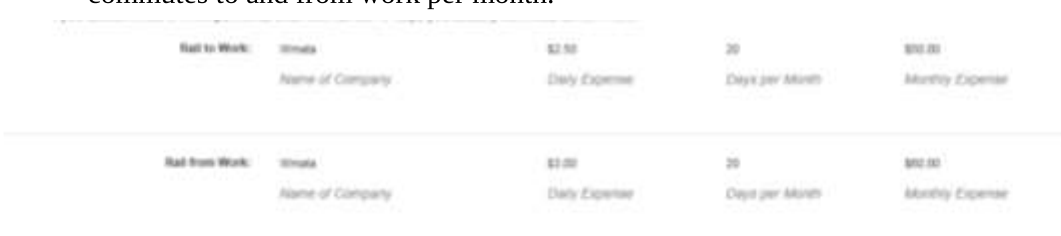
4. Approving roles for Supervisors and Transit Coordinators

Supervisors- Only approve your employee's application

- Employee is a Federal Employee
- Disapprove all applications that are NOT your employee

Supervisors- Expense Sheet includes the following information:

- Days per Month reflects participants work schedule – the number of days the participant commutes to and from work per month.



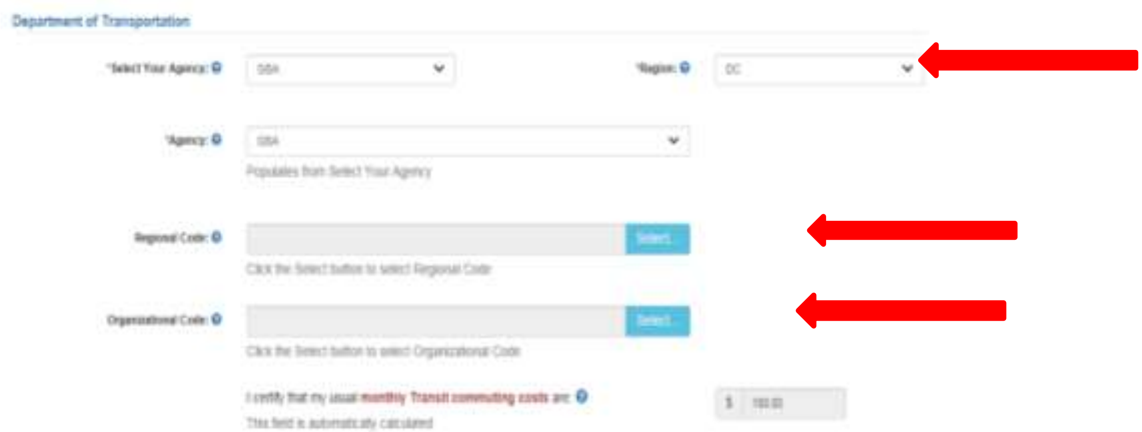
Transit Coordinators- Expense Sheet includes the following information:

- Name of Transit Authority
- Includes expenses for to work and from work- or indicates Monthly pass
- The cost of the transit is what is most Cost Effective for the government, should a monthly pass be purchased in the place of purchasing a daily pass.
- Regional Code- make corrections to incorrect Regional Code
- Organizational Code- make corrections to incorrect Organizational Code.

Note: Disapprove the application if any of the above is incorrect, please advise participant exactly what to update or change.

There are three fields Supervisors and Transit Coordinators can update or make corrections:

Make corrections to each accounting field below that is incorrect.



The Region – Transit Coordinators are required to update according to the region assigned, please Refer to Regional Coordinators Master List on the Transerve.dot.gov/participants/gsa website to find the Region assigned to you.

Approval Section:

Smart Trip Card field. Regional and Debit Card participants enter – **NA** DO NOT ENTER DEBIT CARD NUMBER.

Check the format of the Smart Card to reflect on of the formats below:

5. Type #1: 012345678 C3DW803 = **012345678**
Type #2: C3DW017 0020 0001 5644 364 6 = **015644364**
Type #3: GD1137 0167 0693 4564 7992 9601 = **01670693456479929601**

b. Disapprove any application that includes a Debit Card number- all Debit card numbers begin with 44. Advise particpant to correct and add NA in this field.

Review according to instuctions included in this guide and then select Approve to approve the application. After the selection is made the label will change into a checkmark.

Review according to instuctions included in this guide 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. Give specific instructions for correction. (i.e. Correct Supervisor's name)

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

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: 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.

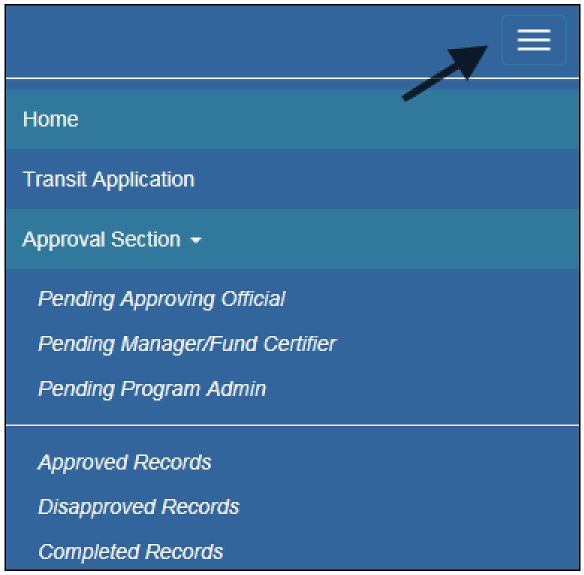


Figure 44: Approval Section Menu Options

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.)*

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

Figure 45: Delete Confirmation page

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)

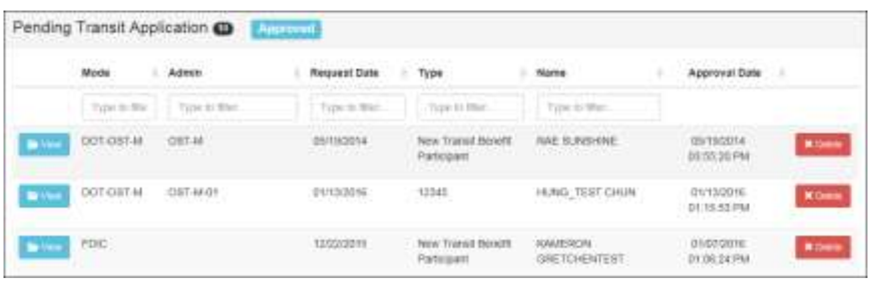


Figure 46: Approved Records

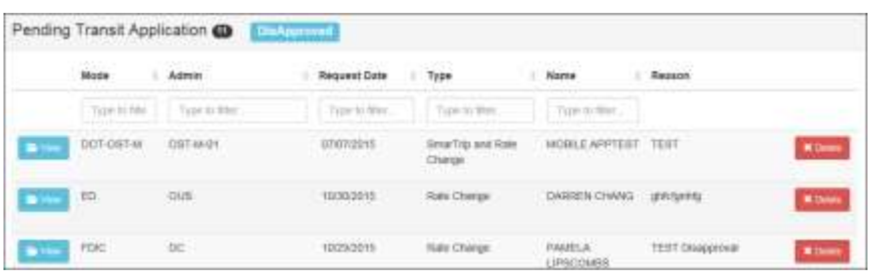


Figure 47: Disapproved Records

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

Figure 48: 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 49: Completed Records

5. ADMIN

The Admin function allows the Program Office to elevate Supervisors and Transit coordinator.

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.*

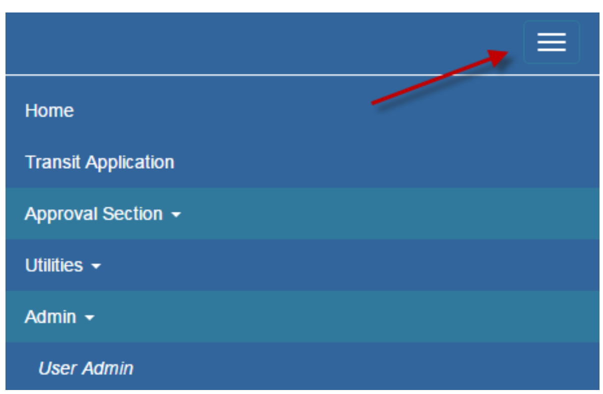


Figure 50: Admin Menu Options

5.1 User Admin

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

Figure 51: Find Users page

To search for an existing user; enter the Username, First Name, Last Name, or select an GSA or Role from the dropdown menu.

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 52: 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

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

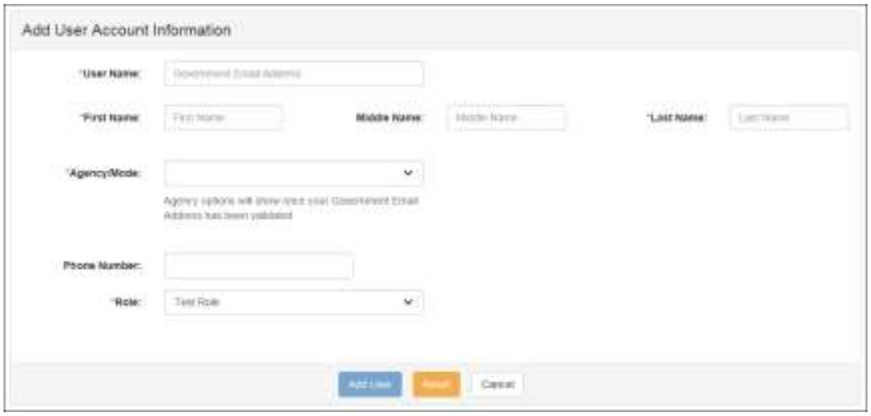


Figure 53: Add User Account Information page

Enter the applicant's official government email address in the User Name textbox.

Complete the account information form.

Select the user role from the Role dropdown.

Click the **`Add User`** button. The Add User Confirmation displays.

Figure 54: Add User Confirmation

Note: ** indicates required field.*

Note: *The agency used in the email for the username 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

From the User Admin page; click the *<u>Username</u>* link. The Update User Account Information page displays with the applicant's information.

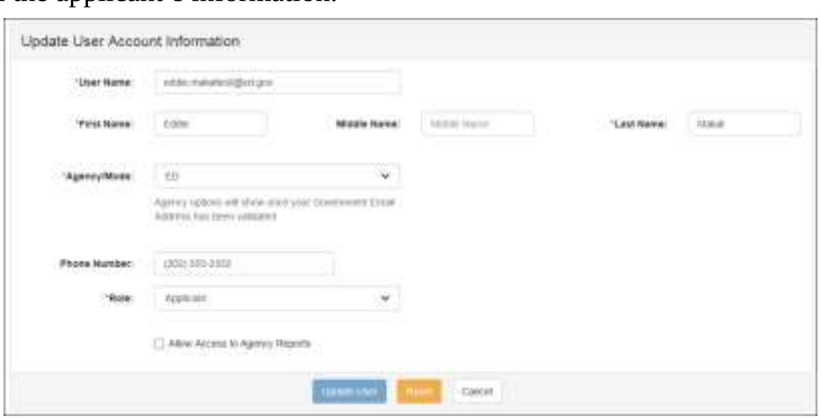


Figure 55: Update User Account Information page

Update the applicant’s user information.

Click the **`Update User`** button. The Update User Confirmation displays.

Figure 56: 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

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

Figure 57: Confirm Delete Message

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

Figure 58: Delete Confirmation

5.1.4 Bulk Update View

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

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

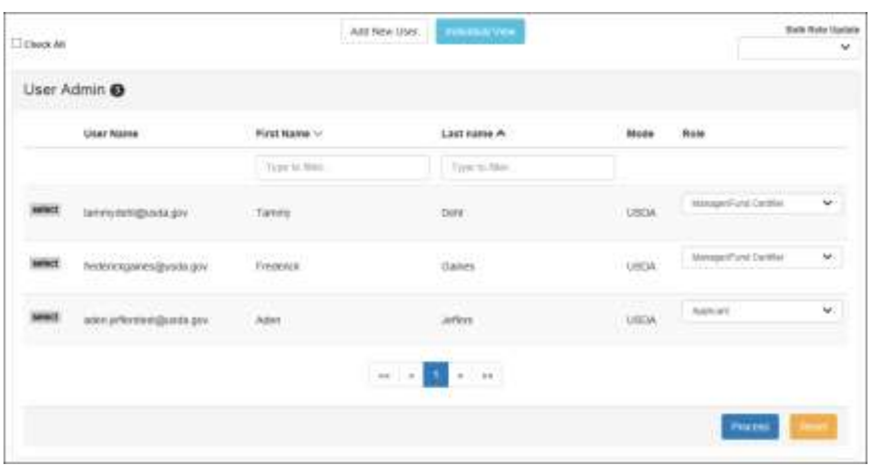


Figure 59: Bulk Update View page

5.1.4.1 Single User Role Update

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

Figure 60: Single Username Select

Click the down arrow for the User Role dropdown menu.

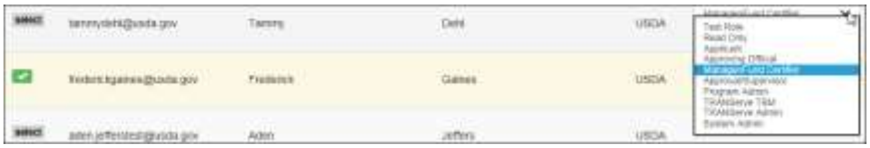


Figure 61: Role Change Select

Select the desired user role from the dropdown menu.

Figure 62: Role Update

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

Figure 63: Confirm Bulk Update Message

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

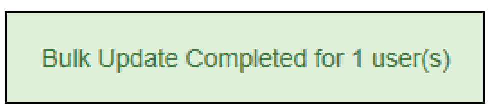


Figure 64: Role Update Confirmation

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 65: Multiple Modes

5.1.4.2 Multiple User Role Update

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

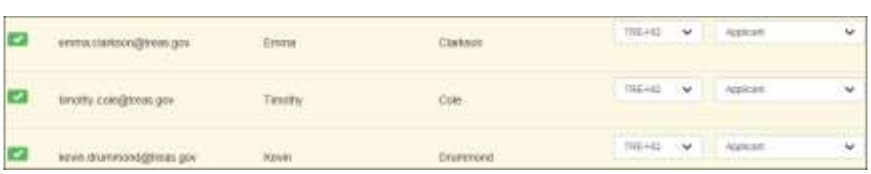


Figure 66: Multiple Username Select

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

Figure 67: Bulk Role Update Select

Select the desired user role from the dropdown menu.

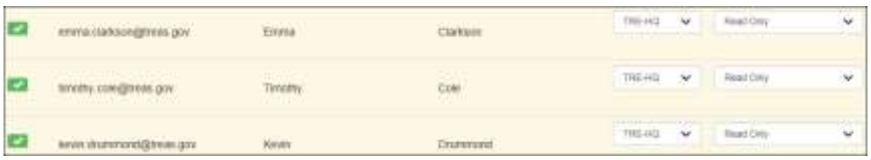


Figure 68: Bulk Role Update

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

Figure 69: Confirm Bulk Update Message

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 70: Pending Application Link

Click the number next to the username to display the Pending Transit Benefit Application Status page.

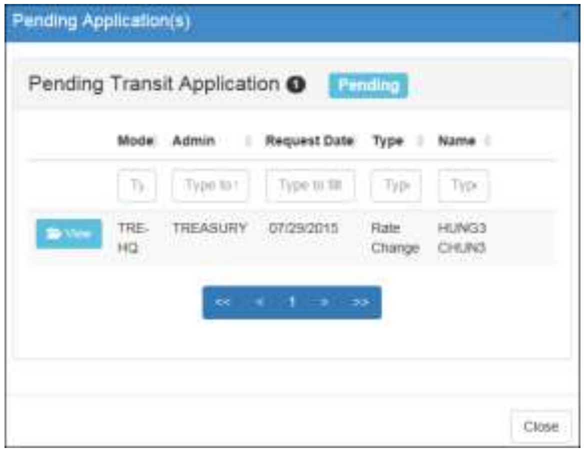


Figure 71: Pending Transit Benefit Application Status page

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

Figure 72: 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.

APPENDIX A: SMARTRIP CARD INSTRUCTIONS

For SmartBenefit Participants: Purchase and Register a SmarTrip® card

Purchase a SmarTrip® Card – This is a reloadable electronic fare card. Using a reloadable card supports government initiatives to support and improve the environment through more sustainable practices.

- a. You can purchase at a Metro Sales Store, Station Kiosk (these are located in Stations where parking is available, a Commuter Store and many retail establishments.

Note: *Look here for more information on locations: http://www.wmata.com/fares/purchase/where.cfm*

- You can also purchase a SmarTrip® Card on line: http://www.wmata.com/fares/purchase/

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

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:

Type #1: 012345678 C3DW803 = **012345678**
Type #2: C3DW017 0020 0001 5644 364 6 = **015644364**
Type #3: GD1137 0167 0693 4564 7992 9601 = **01670693456479929601**