Office of Finance and Operations
Office of Security, Facilities and Logistics
Facilities and Logistics Services Division
Transportation Services Branch

TRANSIT BENEFIT APPLICATION GUIDE

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1 INTRODUCTION

1.1 PURPOSE

The purpose of this document is to guide the user on how to apply for the Department of Education's Transit subsidy program. The Transit Benefit application process consists of four steps:

1) Completion of the Integrity Awareness Training via the FedTalent System,

2) Register and submit application via online TRANServe website, and

3) Complete and submit application via online TRANServe website.

4) Secure and register your SMARTrip card or TRANServe Credit Card

1.2 BACKGROUND

The Department of Education offers a monthly allotment of up to two-hundred and seventy dollars ($270) to assist employees with home to work commuting costs.

1.3 PAYMENT OPTIONS

There are two payment options:

*TRANServe benefits cannot be used for SMARTrip card (Metro) or Parking.

SMARTrip Card (DC Metropolitan Area)	TRANServe Credit Card (Nationwide)
• A SmarTrip purchased online or through the SmarTrip app is automatically registered. • If the SmarTrip app was used to transfer a registered SmarTrip to Apple Wallet or Google Pay the card is automatically registered. • A SmarTrip purchased at a Fare Vending Machine, commuter store, or retail outlet can be registered online or through the SmarTrip app. • Create a free SmarTrip account online or using the SmarTrip app for access to card management and secure fare purchases. • 10 business days to receive benefits (auto-load via metro gate turnstile) • Benefits auto-load on the first of the month (smart benefits balance viewed ONLY via metro gate turnstile display panel) • Separates personal and transit benefits funds.	• 7-10 business days to receive. • Accepted Nationwide by transit authorities. • Online payment options IMPORTANT: The card is allocated funds on the 10th of every month. Example: Funds added on the month of January 10, is for the month of February NOTE: Any remaining balance is credited back to agency on the 9th of every month.

2   APPLICATION PROCESS

2.1   INTEGRITY AWARENESS TRAINING

Complete the Transit Benefit Integrity Awareness Training via FedTalent.

NOTE: INTERNS ONLY need to obtain the Power Point version of the Integrity Awareness Training by clicking this link – Transit Integrity Awareness Training and open the file located under the Helpful Links section.

EDUCATION EMPLOYEES: Click FedTalent and sign in with your ED assigned username.
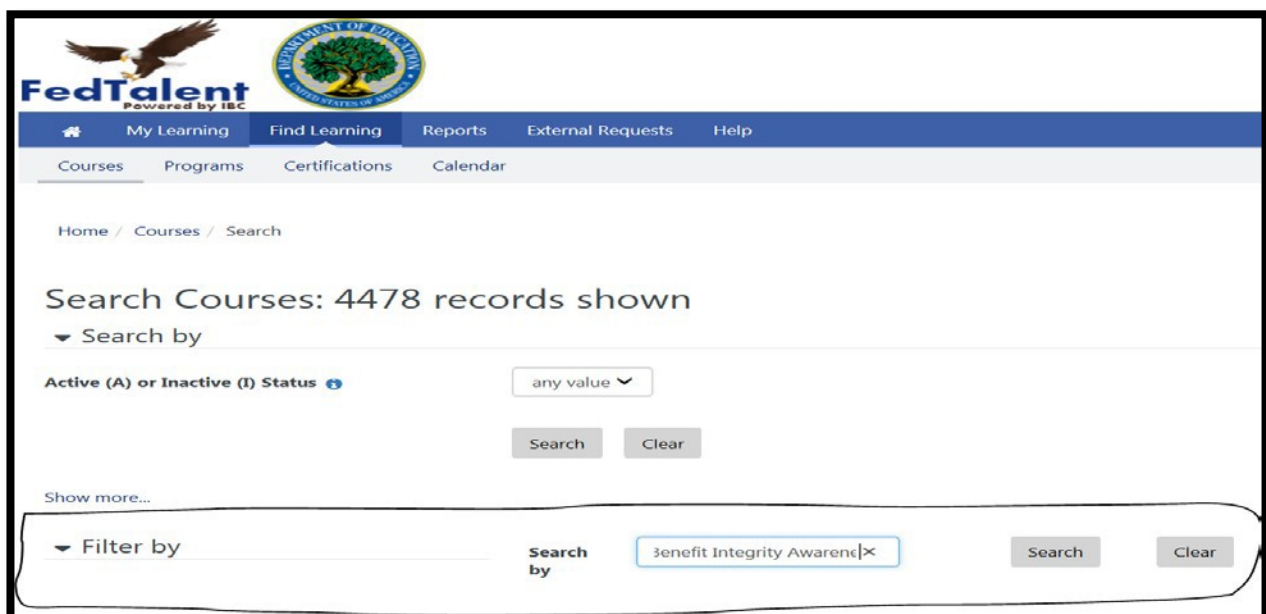
From the Home screen

- Hover the cursor over "Find Learning" and click "Courses."
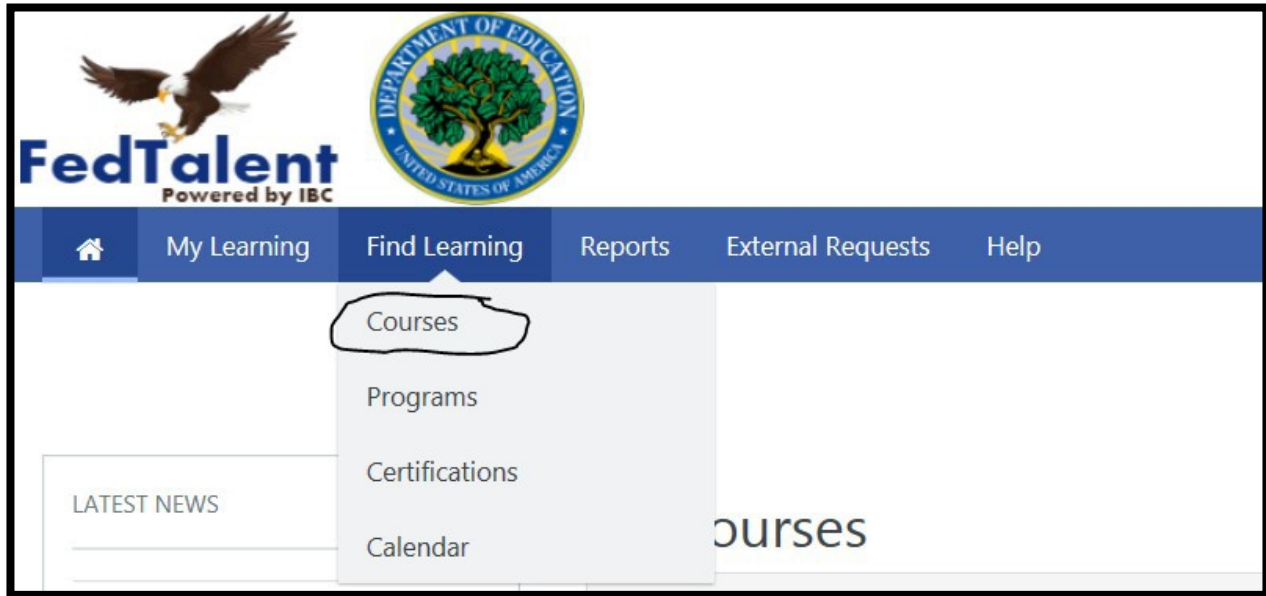
In the

Courses window screen

- Enter "Transit Benefit Integrity Awareness Training" in the "Search by" box and click "Search"

To open the "Course Summary"

- Click the 🛈 icon to open the "Course Summary"
- Click "Launch course" to access the training
- Complete the training
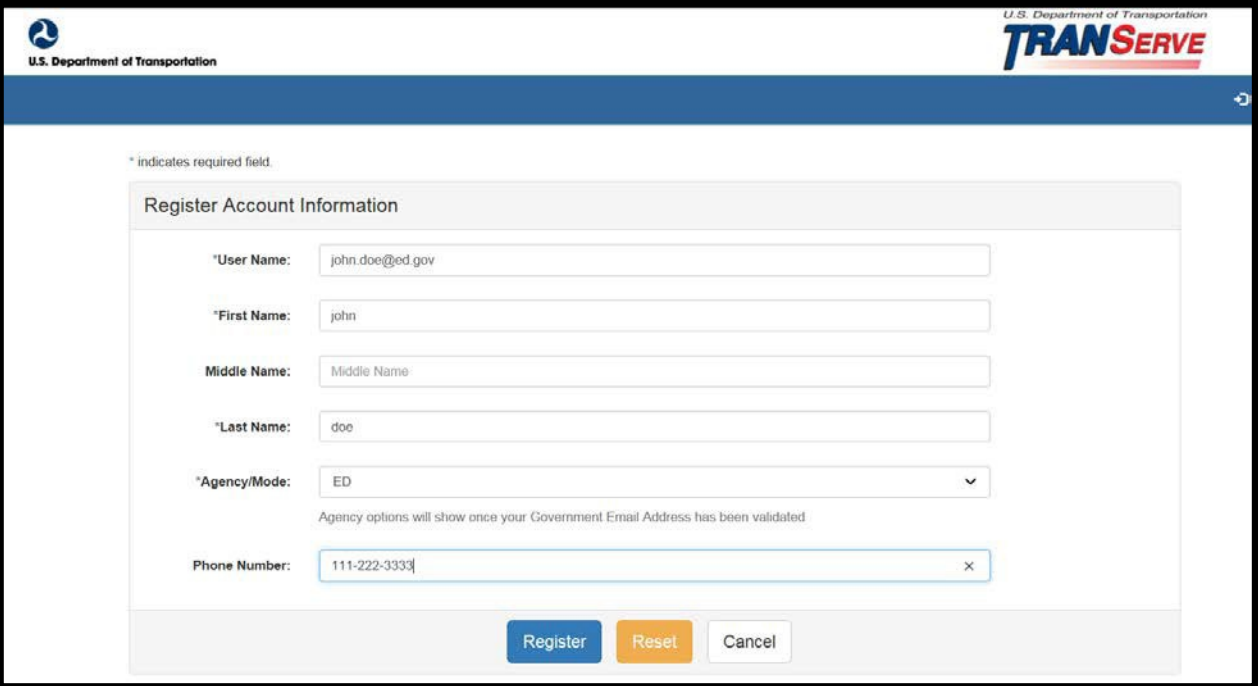
2.2   REGISTER IN TRANSERVE WEBSITE

Access the TRANServe website

- Click this link TRANServe to access the TRANServe log in screen
- Click "Register" to register within the TRANServe system

Complete the Registration form

- User your ED email address as your username and enter your desk phone number
- Click "Register"

After completing the registration form, the system will generate a generic password that will be sent to your ED email address, and you will be returned to the "Log In" screen. Enter your username as your ED email address and enter the generic password that you received from the TRANServe system.

- Click "Log In" after entering your username and password

After Logging in, you will enter the "Rules of Behavior" screen. Please read the Rules of Behavior information and click "I Agree."

2.3 CHANGE PASSWORD

Once you are logged in, change your password by selecting "Change Password."

Complete the "Change Password" form and click submit

Once you have successfully changed your password, a message will be displayed on the top of the screen that says, "Your Password has been successfully changed."

- Enter username and password and log in

2.4   COMPLETE AND SUBMIT ONLINE APPLICATION

There are three options within the **Home** screen:

- Transit Benefit Application – directs user to Transit Application screen where the participant can select an action to request information, withdraw from the program, address/SMARTrip change, and/or certify/enroll.

- My Account – Allows user to change personal information. Users can use this option to change their name and phone number.

- Change Password – Allows user to change password.

In the TRANServe Home page, select "Transit Benefit Application."
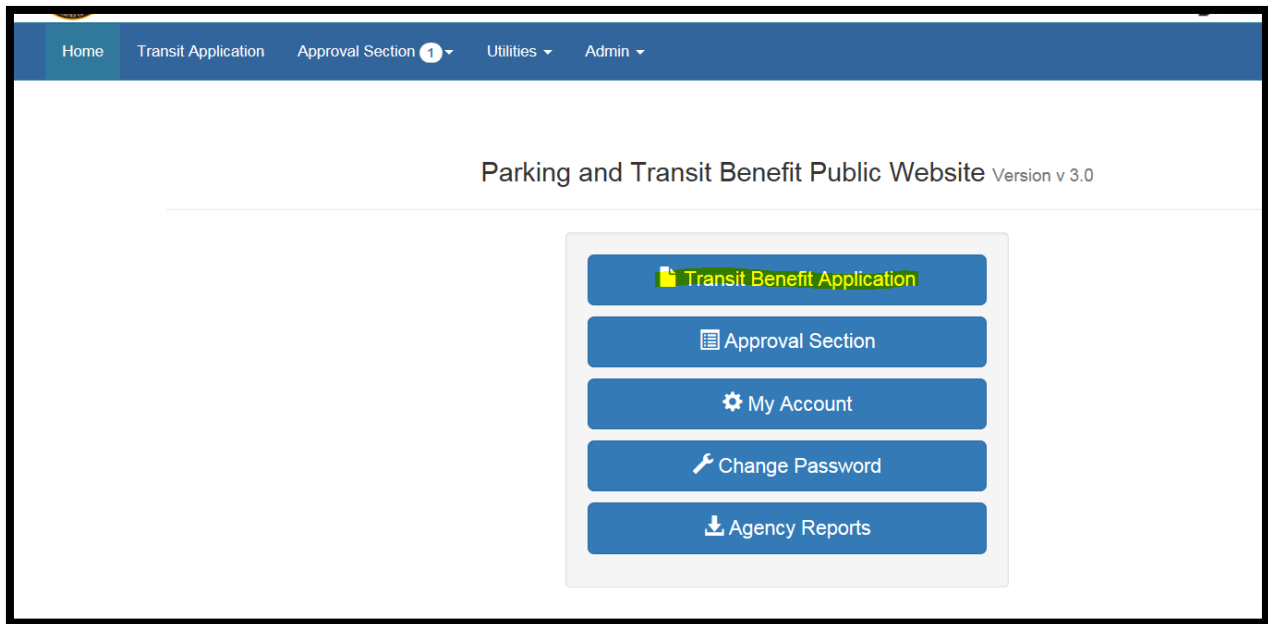
On the next screen, there are 4 options:

- Request for Information: Choose this option for any questions regarding the transit program.

- Withdraw from the Program: Choose this option to withdraw from ED's transit benefit program.

- Address/SMARTrip Change: Choose this to change SMARTrip card information.

- Certify/Enroll: Choose this option for new users, annual recertification, or increasing/decreasing benefits.

Click the radio button on "Certify/Enroll" to enroll as a new user

- Click Continue

YOU MUST AGREE TO THE TERMS AND CONDITIONS OF THE TRANSIT BENEFIT PROGRAM TO PROCEED WITH APPLICATION.

Read the terms and conditions of the Transit Benefit Program

- Click "I Agree" to proceed with the Transit Benefit Application Worksheet.

In the Transit Benefit Application Worksheet, below are the following options for the "Reason for Certification" field:

- **Address or SmarTrip® Card Number Change** – allows the participant to change the SMARTrip card number and address information.

- **Agency** – not applicable

- **Annual Certification/Recertification –** allows the participant to submit an Annual Recertification application.

- **New Transit Benefit Participant –** For employees who want to participate in ED's transit program.

- **Rate Change –** For participants who want to change the rate for their commuting expenses.

- **Vendor and Rate Change –** For participants who want to change both vendor and rate of their commute.

For all new employees, please choose the option "New Transit Benefit Participant."

In the Civilian/Military field, choose the Civilian option.

In the "Work Status" field, choose the best option that best suits your employment status:

- **Full Time –** for full time employees.

- **Part Time –** for part time employees.

- **Intern –** for interns and volunteer interns.
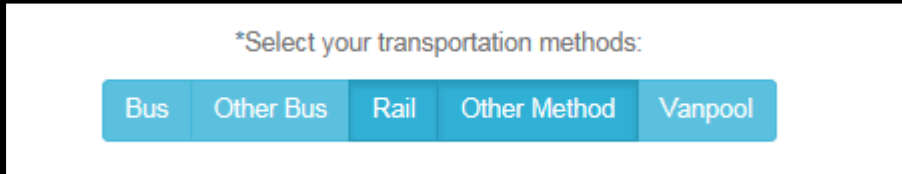
Civilian/Military: ⓘ	CIVILIAN	⌄
Work Status:	Full Time	⌄

In the Transit Benefit Transportation Methods, choose the following options:

- **Bus –** local metropolitan transportation busses.

- **Other Bus –** commuter Busses.

- **Rail –** local metropolitan train services, i.e., MARTA, BART, WMATA, etc...

- **Other Method –** other train services, i.e., VRE, MARC, Fairy, etc...

- **Vanpool –** a ride sharing service that includes two or more members commuting together.

Please click on the appropriate tab in order to add a transportation method. Below is an illustration of the transportation method tabs. Highlighted in dark blue, both Rail and Other Method tabs actively added.

*Select your transportation methods:

| Bus | Other Bus | Rail | Other Method | Vanpool |

Complete the following fields of the Transit Benefit Transportation Method section:

- **Name of Company** – enter the name of the company of your transportation services, i.e., Metro, MARC, VRE, etc...

- **Daily Expense** – enter the amount of daily commuting expense in both fields, rail to work and rail from work. The monthly expense field will automatically calculate once all daily and days per month fields are completed.

- **Days per Month** – the program is based on a 20-day work schedule per month. Enter how many days that you will be commuting to work. Please account for your telework schedule within this section. For example, if you telework one (1) day per week, which is a total of four (4) days per month and subtract it from the 20 day monthly work schedule, this will provide the amount of "Days per Month" that you will be commuting to work.

In the Transit Benefit Program Application section, please enter your work information:

- **Last 4 SSN** – enter only the last four digits of your social security number.

- **Name, Email, and Common Identifier** – this section will be prepopulated.

- **Work Phone** – enter your desk phone number.

- **Admin** – enter the appropriate Principle Office that you work for.

- **Work Address** – enter your work location address.

Complete the Residence Information and the Approver Information section of the application.

- **First Approver (Executive Officer) –** First Approver is the name of the Executive Officer for your Principal Office (click link <mark>Executive Officer List.</mark>). Click the blue "Select" button to choose the appropriate First Approver.

- **Manager/Fund Certifier –** choose "COORDINATOR ED TRANSIT BENEFIT."

- **Points of Contact –** all names are under DeNeen Rapley. Please choose the appropriate region.

- **Manager Phone –** not required.

- **SMARTrip® Card Number –** participants using only SMARTrip Benefits, enter your SMARTrip card number.
- **TRANSERVE Credit Card -** participants using the TRANServe Credit card, should enter "NA." For participants splitting their benefits between SMARTrip Benefit and TRANServe Credit card, enter your SMARTrip card number.

- **Comment section for Agency Approver –** for participants splitting their benefits between SMARTrip card and TRANServe Credit card, please include a statement of how you would like your benefits separated in the comment box.

Example: "I would like my benefits split in following way: SMARTrip Card: $100 and TRANServe Card: $170"

3 WITHDRAWAL PROCESS

3.1 WITHDRAWING FROM THE PROGRAM

To withdraw from the transit benefit program, choose the option "**Withdraw from the Program**" on the "Select an Action to Continue" screen.

In the Withdraw screen, complete the following fields:

- Withdrawal Date – enter your effective withdrawal date. This will be the date that your benefits will be deactivated.

- First Approver – Your Principal Office Executive Officer's name.

- Manager/Fund Certifier – Choose "Coordinator ED Transit Benefits".

* indicates required field.

Withdraw from the Program

Last 4 SSN:	****
Name:	▬▬ (Last) ▬▬ (First) ▪ (Middle)
Email Address:	▬▬
Agency/Mode:	Department of Education **(ED)**
*Work Phone: ❓	202-260-8354
*Withdrawal Date:	📅
	Click the Calendar to select a Withdrawal Date
*First Approver: ❓	Select...
	Click the Select button to select First Approver
*Manager/Fund Certifier: ❓	Select...
	Click the Select button to select Manager/Fund Certifier
Comment for Agency Approvers: ❓	
	You have **1995** characters remaining

4   TRANServe CREDIT CARD

4.1   TRANServe CREDIT CARD ACTIVATION

1. All cards are shipped directly to your home address listed on your application.

2. Activate your card by calling U.S Bank Customer Service at 1-888-994-6722.
   You will need the following:

   - Work Zip code – 20202

   - Purchase Limit Amount – This information is your monthly commuting cost that you entered within your Transit Benefit online application.

   - For credit card posting purposes, please purchase your tickets, passes, or other fare by the 4th of each month to prevent a disruption in your following month's benefit.

Your transit funds will be electronically deposited to your TRANServe Card on the 10th day of each month.

3. Select the "Credit" option when purchasing transit fare media.

NOTE: TRANServe Credit Card balance

Here are four ways to keep track of your account balance.

1. Mobile app1: download the U.S. Bank Access® Online Mobile app from the Apple App® or Google Play™ stores.
2. Log into Access Online at access.usbank.com, then go to My Personal Information
3. Visit access.usbank.com
4. To hear your balance call 1-888-994-6722 or 711 for the hearing impaired. You must have your TRANServe Credit Card number available prior to calling. If you do not have your card number, please contact the Transportation Services Branch.

5   APPLICATION PROCESS

5.1   APPLICATION PROCESS FLOWCHART

The application process is a three-tier approval process. When an application is submitted, the Executive Officer will receive a generated email from the TRANServe system indicating that a new application has been submitted and it is ready for approval. For each approval/disapproval, the participant will receive a generated email indicating the status of their application whether it is approved/disapproved. Below illustrates the three-tier approval process.
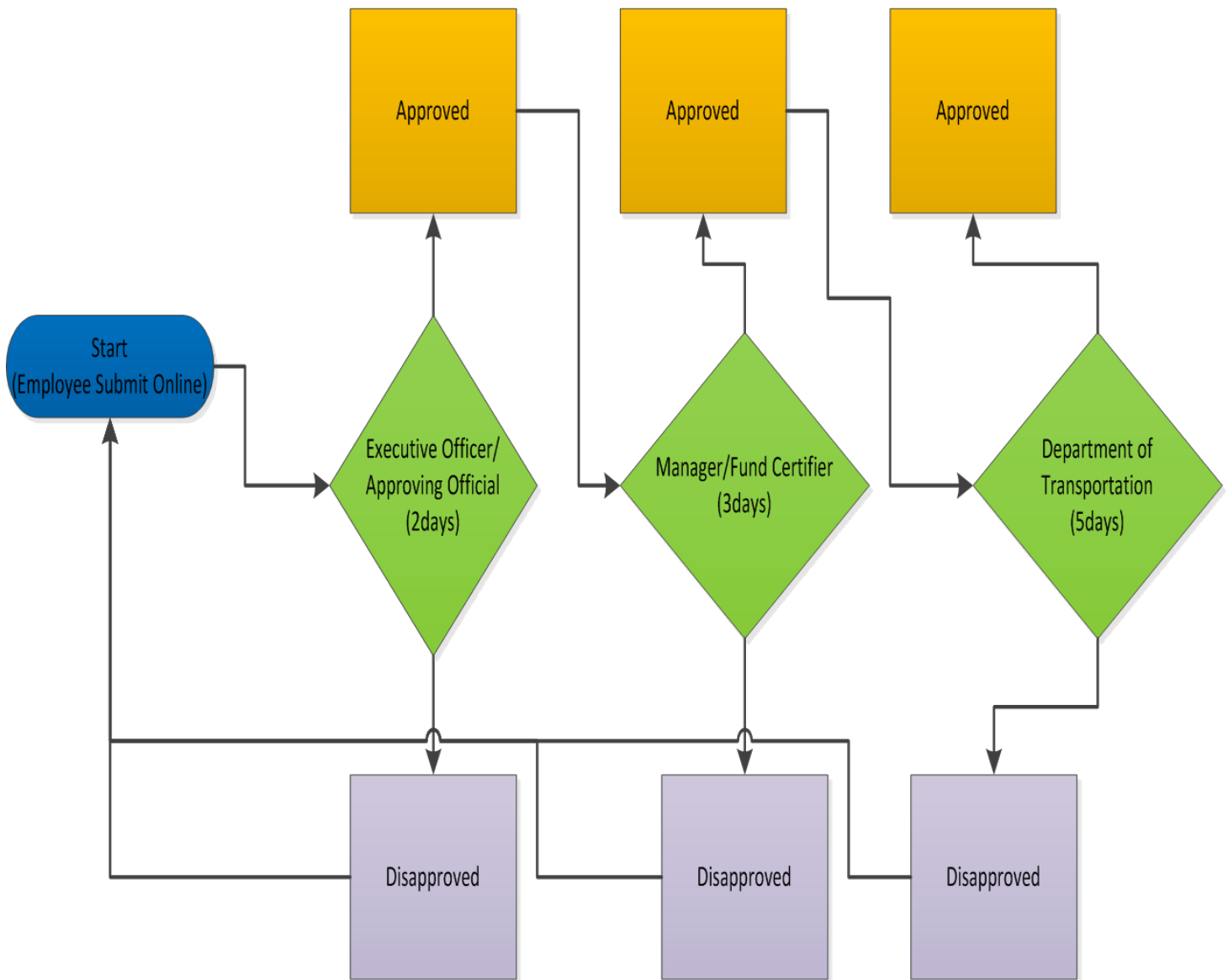
SMARTrip Card Processing Timeframe – 10 business days, funds will auto-load onto the card electronically (if applications are received and approved by DOT).

TRANServe Card: Processing Timeframes – TRANServe Card will take 7 to 10 business days to receive for new participants and twenty-four hours for replacement cards.

6   EXECUTIVE OFFICERS LIST (APPROVING OFFICIAL LIST)

IMPORTANT NOTE: The Executive Officer List (Approving Official List) updates periodically. Please click on the link to obtain the Executive Officer List. **Please do not select any of the Transportation Services Branch employees as your Approving Official, doing so will significantly delay the processing of your application.