APPROVER TIME SAVERS

Purpose: This PowerPoint outlines the steps Approvers will complete prior to attending the Live Virtual Training Session and accessing the TRANServe System for the first time. Approvers who are <u>not</u> program participants will complete steps 1 -2. Approvers who are also program participants will continue and complete steps 3 – 5. This slide outlines steps 1-5, while the subsequent slides provide instructions for each step.

Step 1: Complete the 10 minute pre-requisite Integrity and Awareness Video On Demand (VOD).

Step 2: Develop a FISMA compliant password. Think of a FISMA compliant password using slide #3. Then, jot it down and save it for use during the live training session.

NOTE: During the rollout, OPE will register Management Officials in the TRANServe System in advance <u>AND</u> assign them respective Approver Roles. Approvers will then receive an email from the PTB Public Website Administrator containing a temporary password—<u>SAVE this Email and STOP Here!</u>

Complete the Next 3 Steps <u>If</u> You are Also a Program Participant:

Step 3: Refer to Approver List for your work location who will review your application form and your POC. In most cases, you will select your Manager again as the POC.

Step 4: Obtain your Employee Common Identifier (ECI)

Step 5: Determine your ACTUAL commuting costs EACH WAY for EACH MODE OF TRANSPORTATION

Note: <u>After the scheduled training session,</u> Approvers will go directly to the "Change Your Password" section of the Approver Quick Guide to begin accessing the system.

TRANServe INTEGRITY & AWARENESS VOD

1. To view TRANServe Integrity Training VODs, simply select the single sign-on (SSO) link: https://ssalms.csod.com/samldefault.aspx

2. To find the training, simply type "**TRANServe**" in the advanced search box in the top left hand side of the screen.

3. Select the TRANServe Applicant and Approver Integrity Awareness Training VOD

4. View the TRANServe Applicant and Approver Integrity Awareness Training VOD

5. Click the "Next" button under the green bar to finish viewing the VOD.

6. Close the next screen and click on the WeLearn Logo in the top left hand side of the screen.

7. Select the blue "My Transcript" button.

8. The next window will list the TRANServe Applicant and Approver Integrity Awareness Training VOD with a blue button to the right labeled "Mark Complete."

9. Click on "Mark Complete" and the button will now read "View Certificate." Click on the "View Certificate" button.

10. A new intranet window will open with your Certificate of Completion. Save a copy of the certificate.

Note: These instructions are Reiterated in the Approver Quick Guide.
Approvers & Applicants Will Complete this VOD Annually.

CREATE A FISMA COMPLIANT PASSWORD IN ADVANCE

1. Use the criteria in the grey box below (Right Corner) to develop a FISMA compliant password. You will use this password and the temporary password emailed to you by PTB Public Website after your scheduled training session.

2. During the rollout, OPE will register Management Officials in the TRANServe System and assign them respective Approver roles (Supervisor or Manager). These Approvers will be emailed a temporary password by the TRANServe System (Email from PTB Public Website).

3. Pre-registered Approvers will skip the "Register" section of the Approver Quick Guide and go the "Change Password" section of the Approver Quick Guide.

TIP: Once on the "Change Password" screen, Approvers will copy the temporary password in the email and paste in the Current Password field and type the FISMA password in the New Password field.
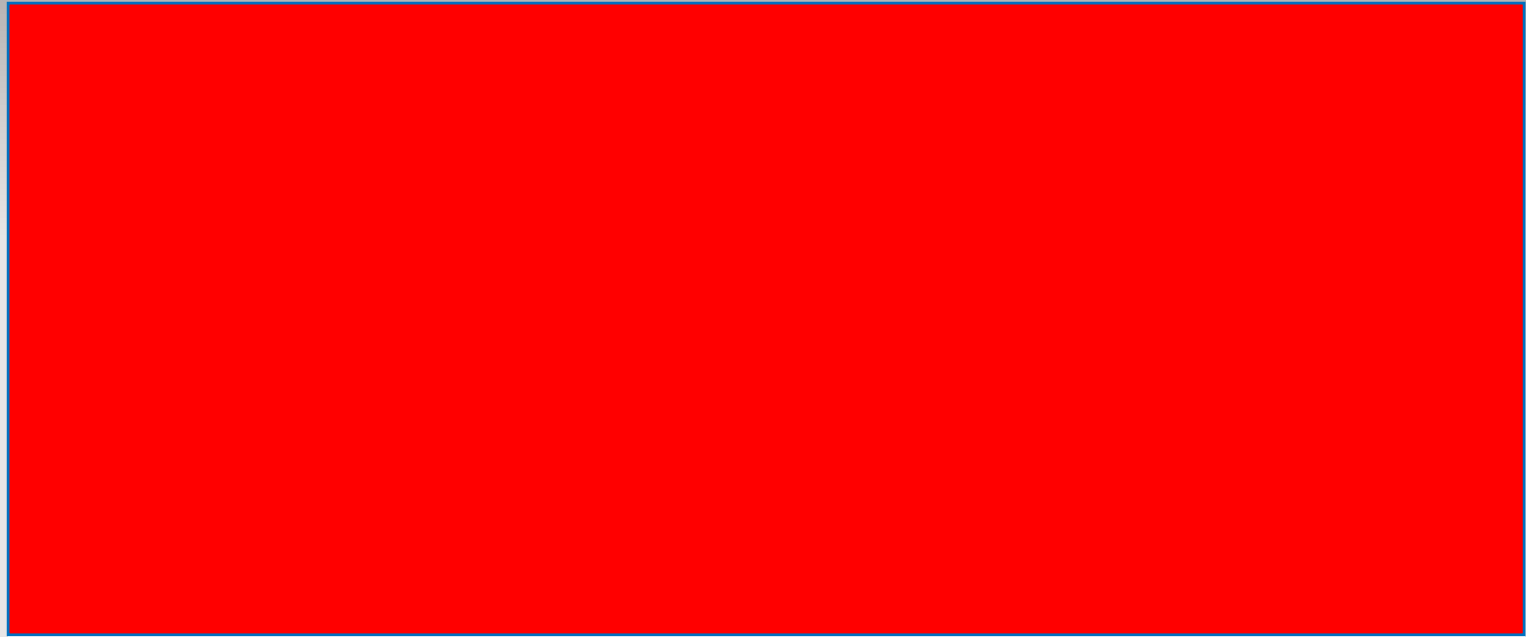
Password must be at least 12 characters long
No password character may be repeated more than 1 time(s) in sequence
Password must contain characters from at least 4 of the following categories.

- Uppercase characters (A through Z)
- Lowercase characters (a through z)
- Base 10 digits (0 through 9)
- Non-alphabetic characters (for example, !, $, %)

Password will expire 60 days after being set
Passwords cannot be reused within the last 24 changes.
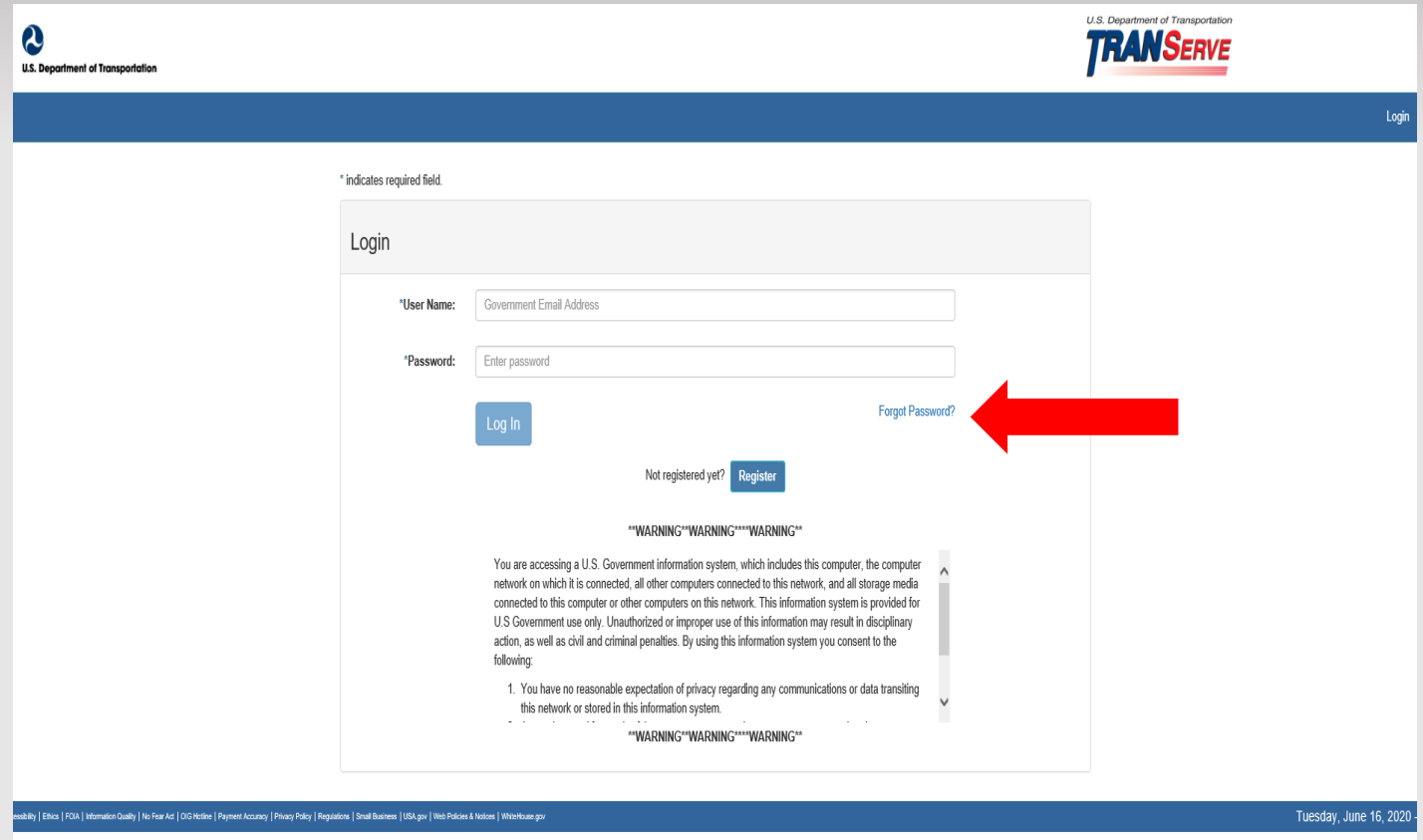
WERE YOU REGISTERED IN THE TRANServe SYSTEM BY OPE BUT, DON'T HAVE THE TEMPORARY PASSWORD EMAILED BY THE PTB ADMINISTRATOR?

The Approver Quick Guide will walk you through the necessary steps for changing your password from the temporary password emailed to you by the TRANServe System (PTB Public Website) to the FISMA compliant password you developed.

If you cannot find the email from PTB Public Website:

1. **Click the "Forgot Password?" button on the log in page of the TRANServe System.**

2. **Go to the "Send It by Email" section.**

3. **Enter your SSA email address.**

4. **Click the "Submit" button.**

5. **Follow the instructions in the "Change Password" section of the Approver Quick Guide.**

WERE YOU REGISTERED BY OPE BUT, DON'T HAVE THE TEMPORARY PASSWORD ISSUED BY THE PTB ADMINISTRATOR? CLICK ON "FORGOT PASSWORD" AND CREATE A FISMA COMPLIANT PASSWORD (See Previous Slide)

OBTAIN YOUR APPROVER LIST
Selecting the Correct Approvers is Critical to the Form's Routing Process

Each SSA work location provided the Regional Office with a list of Management Officials who will review Applicants' forms for benefit authorization. The Regional Office has also identified the Regional Transit Coordinator (RTC) who will conduct the final review as Approver 3.

Prior to accessing the TRANServe System

Refer to the Approver List provided by the RTC to ensure you make the correct selections for form routing since, special instructions apply to Approvers who are program participants. The Approver Drop Box Menus are listed below in the order they will appear as you complete the electronic Certify/Enroll form:

❑ **Regional Transit Coordinator Drop Box Menu:** Select the name of the RTC identified by your Regional Office (Approver 3)

❑ **Supervisor Drop Box Menu:** Select the name of the Supervisor (Approver 1) selected by your office and provided to the Regional Office

❑ **Manager Drop Box Menu:** Select the name of the Manager (Approver 2) selected by your office and provided to the Regional Office

❑ **POC Drop Box Menu**: Unless otherwise instructed, select the name of your Manager (Approver 2) **again**

OBTAIN YOUR EMPLOYEE COMMON IDENTIFIER (ECI)

1. Go to the Employee Data application at: **https://eedata.personnel.ba.ssa.gov/** and enter the last 4 digits of your SSN and click submit.

2. ECI Number is below the EMPLOYEE INFORMATION header.

CALCULATE YOUR ACTUAL MONTHLY COMMUTING COSTS: MODE OF TRANSPORTATION COST & ACTUAL COMMUTE DAYS

Transit Benefit Transportation Methods

Always follow your Agency work schedule policy for specific guidance on the Days per Month entry.

Defined work schedule examples:

- If you work a Basic schedule of 8-hours per day, the average amount of 20 Days can be entered into the Days per Month column
- If you work a Flex Schedule of 9-hours per day, the average amount of 18 Days can be entered into the Days per Month column
- If you work a Compressed schedule of 10-hour days, the average amount of 16 Days can be entered into the Days per Month column
- If you telecommute or work part time, enter the number of days you actually commute to/from work.

1. Determine your average monthly commute days based on your work schedule minus your telework days (Pre-COVID-19):
   - Consider your most current work schedule on file
   - Consider your most current telework agreement on file
2. Obtain a Trip Planner cost breakout from your Mass Transit provider or your Qualified Vanpool cost agreement.
   - Monthly passes should be divided by 2 to show cost each way.
   - Monthly vanpool costs should be divided by 20 to determine the daily round trip cost. Then, multiplied by the average number of commute days (minus telework). This will give you the total round trip cost for your total commute days. You should divide by 2 to list the vanpool cost each way (See the next slide).

CALCULATE YOUR MONTHLY COMMUTING COSTS:
ENTER THE MODE(s) OF TRANSPORTATION, COST EACH WAY AND ACTUAL COMMUTE DAYS

*Select your transportation methods:

Bus | Other Bus | Rail | Other Method | Vanpool

Bus to Work:
Name of Company | $ Daily Expense | Days per Month | $ Monthly Expense

Bus from Work:
Name of Company | $ Daily Expense | Days per Month | $ Monthly Expense

Rail to Work:
Name of Company | $ Daily Expense | Days per Month | $ Monthly Expense

Rail from Work:
Name of Company | $ Daily Expense | Days per Month | $ Monthly Expense

Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.

Total Monthly Expense: $ 0.00