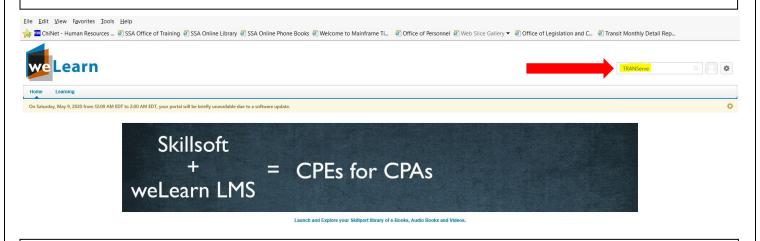
#### SSA TRANSIT BENEFIT PROGRAM

### TRANServe WEB APPLICATION: QUICK APPLICANT GUIDE

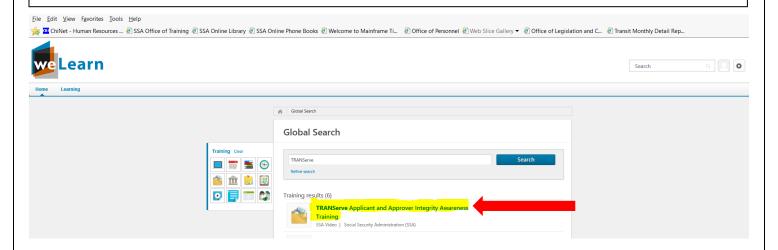
### TRAINING PREREQUISITE

Begin by completing the Transit Benefit Integrity Awareness Training in WeLearn, if you are an SSA employee who already receives or is eligible to receive electronic SSA Transit Subsidy benefits issued by DOT TRANServe (TRANServe card or SmarTrip card), select the single sign-on (SSO) link: <a href="https://ssalms.csod.com/samldefault.aspx">https://ssalms.csod.com/samldefault.aspx</a>

1. Type "TRANServe" in the advanced search box in the top left hand side of the screen

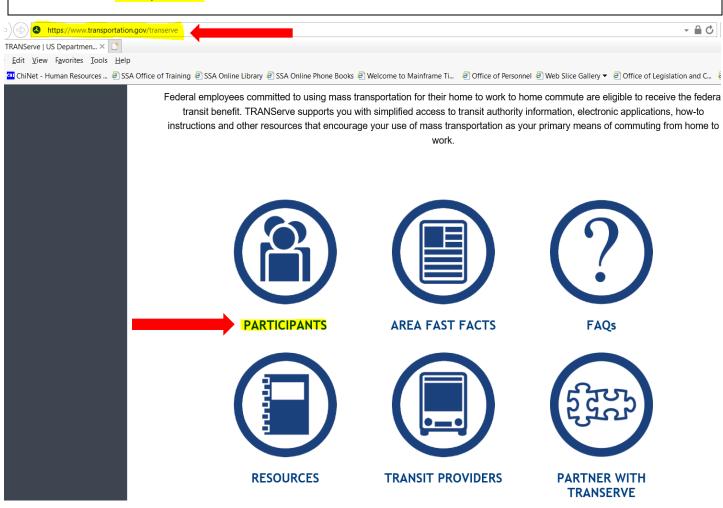


- 2. Select the TRANServe Applicant and Approver Integrity Awareness Training
- 3. Launch and view the VOD
- Mark the VOD as complete and click on the Acknowledge button to certify you viewed the training in its entirety.
- 5. You will be required to certify that you completed this training when you begin the New Transit Benefit Participant form.



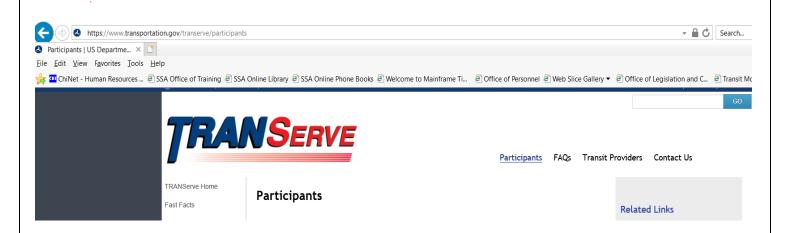
### **ACCESS THE TRANSIT BENEFIT APPLICATION**

- 1. Open an Internet Browser and enter the URL: <a href="https://www.transportation.gov/transerve">www.transportation.gov/transerve</a>
- 2. Click the **Participants link**



### **ACCESS THE TRANSIT BENEFIT APPLICATION**

3. Scroll down to select your Agency (SSA)



TRANServe supports you with simplified access to transit authority information, electronic applications, how-to instructions and other resources that encourage your use of mass transportation as your primary means of commuting from home to work.

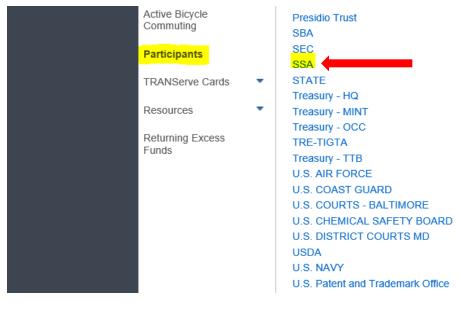
The transit benefit is a subsidy, not an entitlement. Simply stated, it can go away.

Protect your transit benefit by following a few basic rules:

- Apply using your Agency's established application process
- Spend the transit benefit to make a direct purchase through your transit authority
- Ride mass transportation for the bulk of your own home to work to home commute  $% \left( 1\right) =\left( 1\right) +\left( 1\right) +\left$
- Comply with your Agency's Transit Benefit Program Policy

Always Protect Your Transit Benefit - Any month the amount you receive exceeds the amount you use, you must return the excess funds to your Agency!

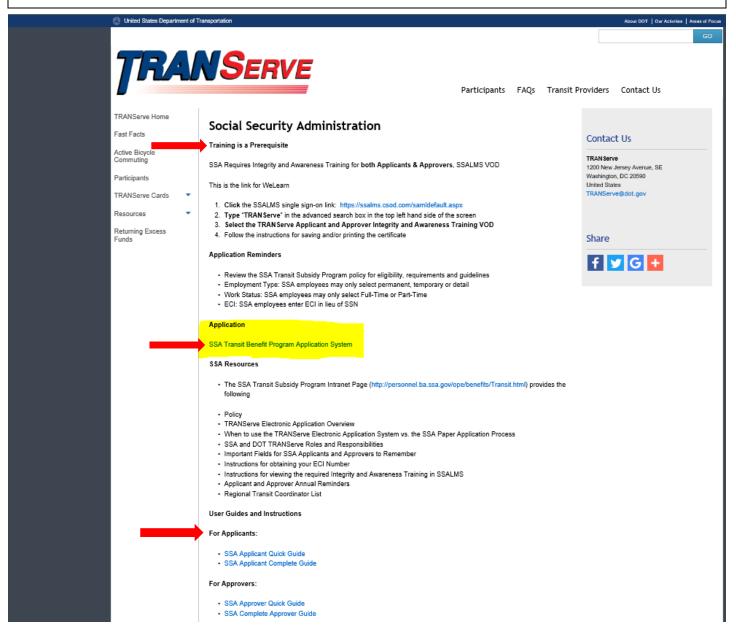
Report Waste, Fraud and Abuse to your Agency Point of Contact or Inspector General Hotline



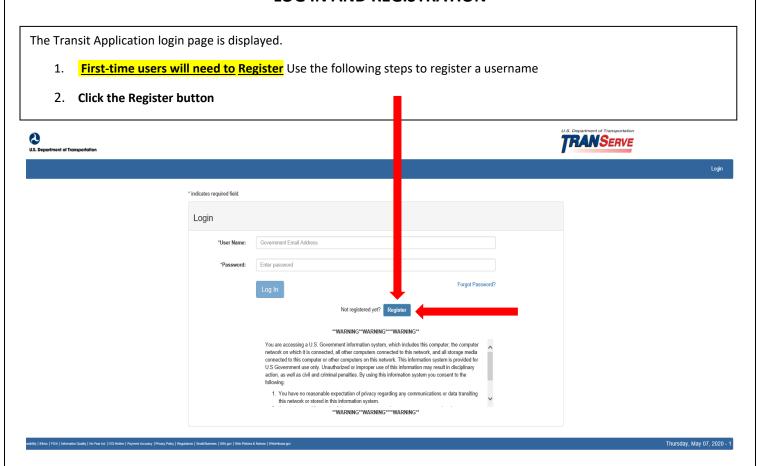
### **ACCESS THE TRANSIT BENEFIT APPLICATION**

- 4. Notice the reminder indicating completion of the Integrity and Awareness VOD Training is a prerequisite.
- 5. Select Transit Benefit Program Application System link

Note: The Applicant Complete Guide is provided at the bottom of the screen for support with completing future actions.



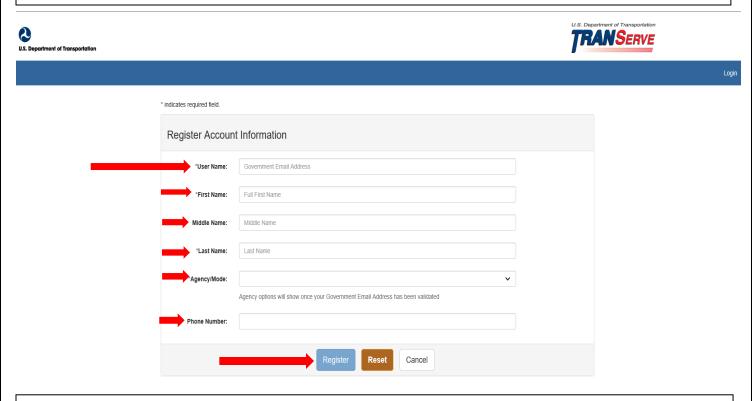
## **LOG IN AND REGISTRATION**



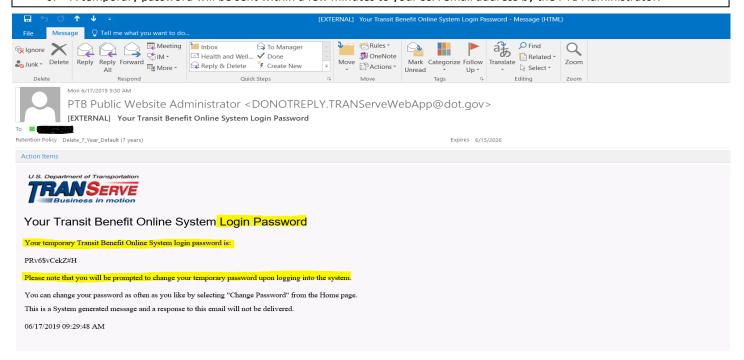
#### **LOG IN AND REGISTER**

The Register Account Information page is displayed.

- 3. Enter your SSA (government issued) email address in the User Name textbox (Outlook email address), this will cause SSA to be displayed in the Agency dropdown list on the application, do not attempt to use an email address.
- 4. Complete the remaining fields of the registration form. Remember to enter your name as it appears in your FPPS or WebTA Records: the name entered should match your name in Outlook and SSA Records.



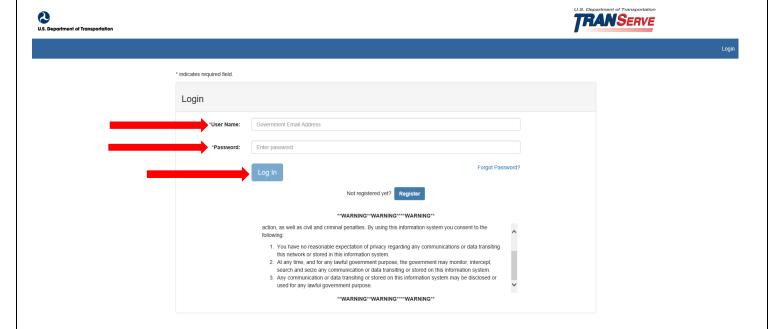
6. A temporary password will be sent within a few minutes to your SSA email address by the PTB Administrator.



### **LOG IN AND REGISTRATION**

Go to the Log In page of the Transit Benefit Program Application System link on TRANServe's SSA Participants page (TRANServe <a href="https://www.transportation.gov/transerve/participants/social-security-administration">https://www.transportation.gov/transerve/participants/social-security-administration</a>) following these steps:

- 10. **Enter the username in the User Name** (SSA email address) in the textbox.
- 11. Enter the retrieved password (Emailed by the PTB Administrator) in the Password textbox.
- 12. Click the Log In button.

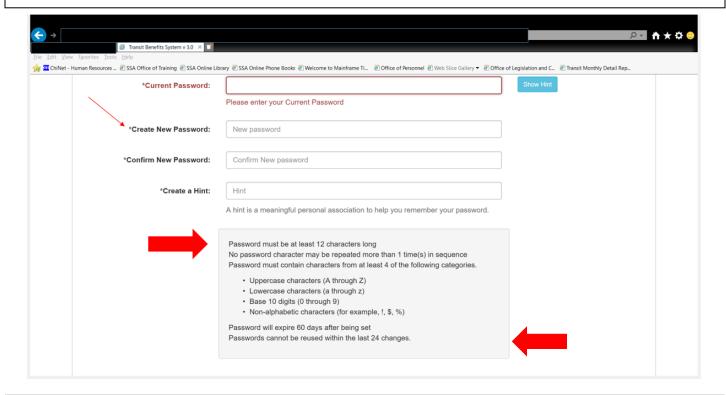


#### **CHANGE PASSWORD**

The Change Password page displays. After logging into the application for the first time, it is required that you change the password to something that you will easily remember. Following steps to change your password:

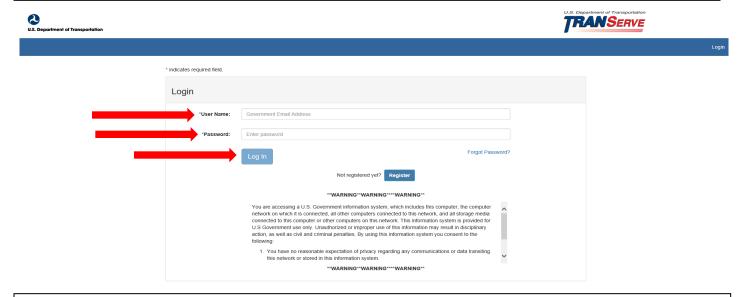
- 1. Enter the retrieved password in the Current Password textbox.
- 2. Enter your new FISMA compliant password in the Create New Password textbox (See Note section below).
- 3. Reenter your new password in the Confirm New Password textbox.
- 4. Enter a hint, something that will remind you of your password in the Create a Hint textbox.
- 5. Click the **Submit** button. Confirmation of the password change displays at the top of the page.

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. You can change your password at any time by using the above steps after clicking the Change Password button on the homepage.

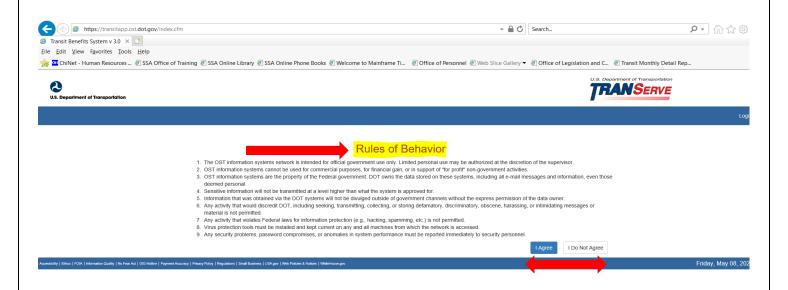


#### TRANSIT BENEFIT APPLICATION

1. Log in by entering your SSA (government) email address and the FISMA compliant password. If you have forgotten your password, you may click on the "Forgot Password?" link to create a new FISMA compliant password. Otherwise, the System will require the user create a new FISMA compliant password every 60 days.



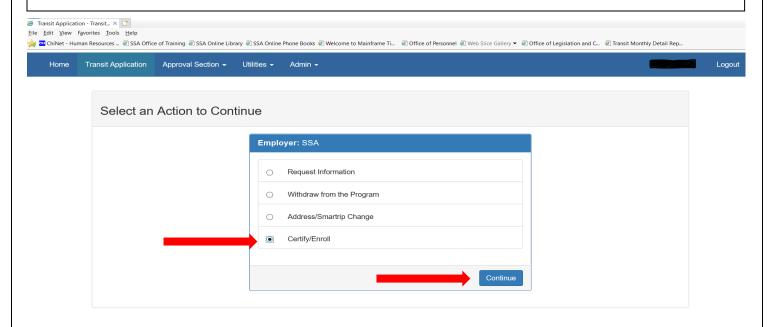
- 2. Review the Rules of Behavior.
- 3. Select "Agree" or "I Do Not Agree." If you select "I Do Not Agree," you will be redirected to the login page.



The Transit Benefit Application option allows the applicant to do 1 of 4 things: **Request Information**, **Withdraw From the program**, **Address/SmarTrip ®Change** (Enter new address or SmarTrip Card Number), or **Certify/Enroll**.

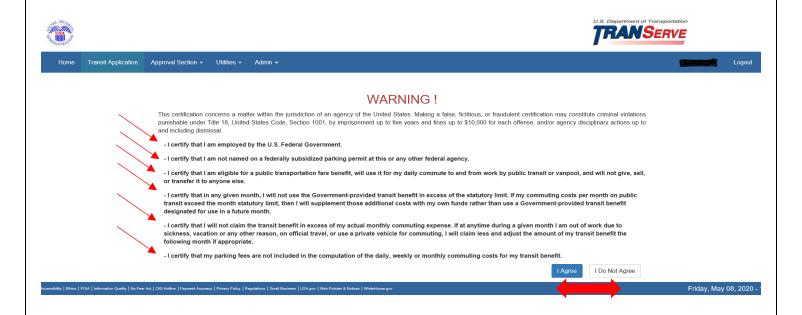
- 4. Select the Transit Benefit Application option from the task bar OR the menu at the center of the page.
- 5. Click the Certify/Enroll radio button.
- 6. Click the Continue button.

**Note:** Existing program participants will select Certify/Enroll to transition to the electronic process, as well as for submitting recertification forms moving forward. Employees new to the program will use the Certify/Enroll option to enroll in the transit benefit program.



- 7. Review the Warning page displayed.
- 8. Click the I Agree button.

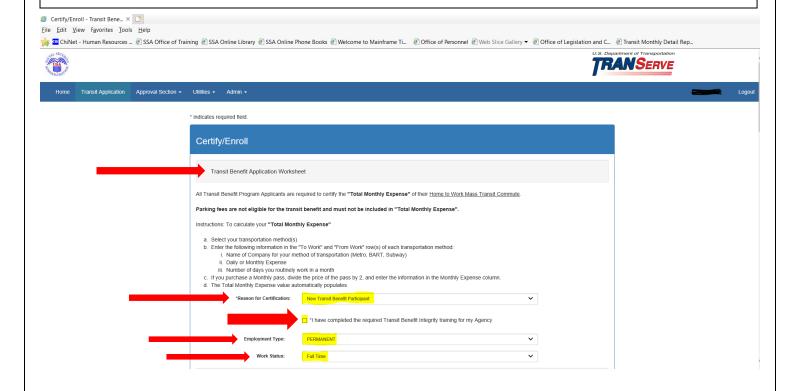
Note: If you select I Do Not Agree, you will be returned to the "Select an Action to Continue" page.



The Transit Benefit Application Worksheet is displayed.

The Transit Benefit Application Worksheet consists of several Drop Menus. Some of the options in the Drop Menus DO NOT APPLY to SSA Applicants, while other fields require region-specific selections. Please follow these instructions carefully:

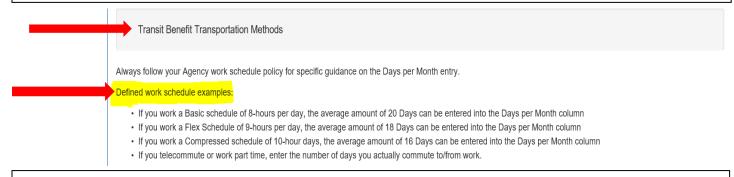
- 9. Go to the Reason for Certification Field and select New Transit Benefit Participant.
- 10. A Check Box will appear. Confirm you completed the SSA required Integrity and Awareness training by checking the box. SSA requires Applicants complete this training annually during the Initial Enrollment and Annual Recertification process.
- 11. **Go to the Employment Type Field and** select one of the following: Permanent, temporary, or detail. Hired interns must select Temporary as the Employment Type <u>and</u> enter the Start/End dates of the Temporary or Detail period in the Comments for Agency Approver Section at the bottom of the page.
- 12. Go to the Work Status Field and select either Full Time or Part Time



#### **Transportation Method Section**

13. Review the "Defined Work Schedules" Section to determine your average number of commute days per month then, from this number subtract your telework days per month based on your Telework Agreement. Applicants will insert the commute days per month in the Transportation Methods Section.

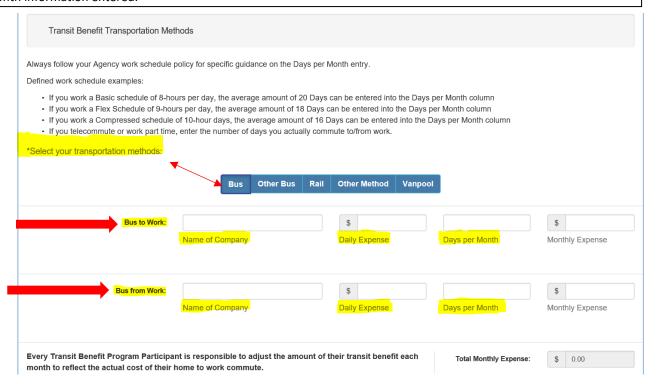
Note: Applicants may <u>not</u> enter more than 20 commute days.



#### **Transportation Method Section**

- **14. Select your Transportation Method(s) and indicate** the cost EACH way for EACH Mode of Transportation for the commute days you have calculated. Employees who commute 20 days per month may find it more cost effective to purchase a monthly pass, whereas daily or weekly passes may be more cost effective for fewer commute days.
- 15. Click on each blue button that represents the applicable Mode of Transportation.

**Note:** The "Monthly Expense" and "Total Monthly Expense" Sections are calculated by the system using the Daily Expense and Days per Month information entered.



Transit Benefit Program Application Section

- **16.** Enter your unique Employee Common Identifier (ECI). See the Instructions for Obtaining Your ECI Number (Available on the Homepage of the OPE SSA Transit Subsidy website). Management Officials may obtain employees' ECI using the HR Portal e7B.
- 17. Enter your work phone number. This is the best number for Approvers to reach you during application processing.

**Note:** The Name and Email fields are pre-filled by the System using the information the employee entered during registration.

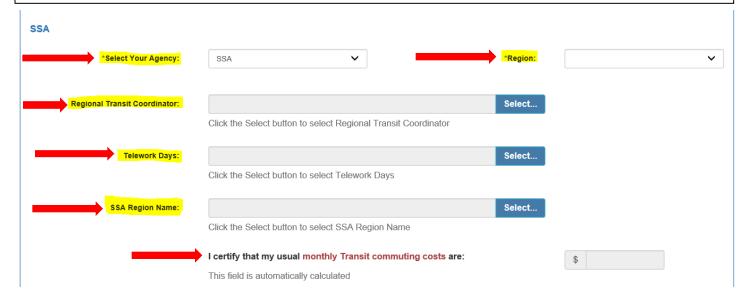


#### SSA Section

- **18.** Go to the Region Field and select the city and state of your work location. If you do not see the work city/state, select the one nearest your work location.
- 19. Go to the Regional Transit Coordinator (RTC) Field and select your RTC: Refer to the Approver list provided to you with this Quick Guide and ECI Instructions or the <a href="Contact Us">Contact Us</a> page of the OPE <a href="Transit Subsidy">Transit Subsidy</a> website.
- 20. Go to the Telework Days Field and select the number of weekly telework days per your Telework Agreement or None if you do not telework.

#### 21. Enter the SSA Region to which you are assigned.

**Note:** The System will automatically populate the monthly Transit commuting costs automatically calculated in the Transportation Methods Section above. Review this amount for accuracy. Make any necessary corrections in the Transportation Methods Section as this is the amount the Applicant certifies is correct.



#### **Work Information Section**

22. Go to the Work Fields and enter your work address information. The Applicant's work address should be the same as the person selected as the POC. In most, if not all cases, the Manager/Approver 2 is also the POC.

**Note:** Out stationed or detail employees enter the SSA work location to which you commute.



#### **Residence Information**

23. **Go to the Residence Fields and enter your residence address information**. This is the home address from which your commute to work begins and should match the address in Employee Express.

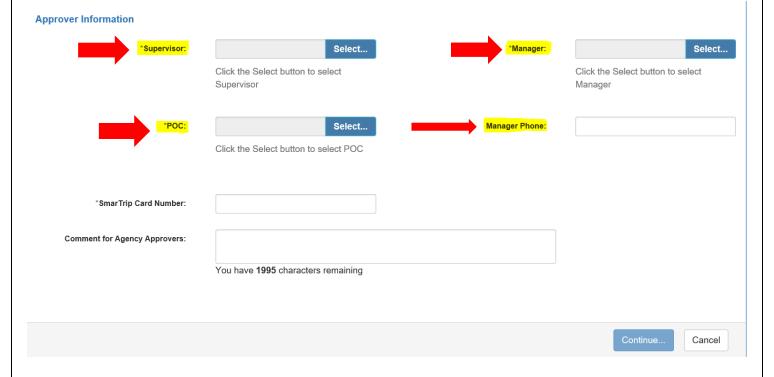
Note: Out stationed or detail employees enter the temporary address from which you are commuting to work.



#### **Approver Information**

Please refer to the Approver List provided to you. Entering the correct Approver Information is critical to the routing and processing of your forms. The Approvers 1 & 2 for your work location will only consist of the Management Officials delegated to these roles. Approvers 1 & 2 will represent to 2 different authority levels within the work locations First-Line Management.

- **24. Go to the Supervisor Field and select your Supervisor/Approver 1**. Refer to the Approver list provided to you. For most employees Supervisor/Approver 1 in in fact their direct Supervisor. Out stationed or detail employees should select their direct Supervisor at the home component; the Supervisor certifying their Time and Attendance.
- **25. Go to the Manager Field and select your Manager/Approver 2**. Refer to the Approver list provided to you. For most employees the Manager/Approver 2 will be the work location Manager. Out stationed or detail employees select the Manager at the out station/host component location or the detail location.
- 26. Go to the POC Field and select your POC; select your Manager/Approver 2 again. The Manager/Approver 2 will also serve as the POC who will receive TRANServe card shipment for you. If the name of the Manager/Approver 2 does not appear in the POC drop menu, go to the Comments for Agency Approvers Section and type: "My POC is (Manager/Approver 2 Name)."



#### Approver Information

- 24. Go to the SmarTrip Card Field and enter your SmarTrip Card Number—NCR PARTICIPANTS ONLY. This only applies to employees who work in the NCR AND have a SmarTrip card. If a SmarTrip card number automatically populates this field the number for accuracy. Do not override this field if the number is correct. If you are an MTSP participant, this field does not apply to you, enter NA.
- 25. Go to the Comment for Agency Approvers Field and enter any of the following and other pertinent details:

  Temporary or detail employment types enter start/end dates. If the Manager/Approver 2 is not listed in the POC drop menu, type their name here.
- 26. Click Continue to receive confirmation of your submittal was successful. A Green bar at the top of the screen confirming your application was successfully submitted to the next Approver. Email will keep you informed of the application's routing status.

