

United States Department of Transportation

TRANSIT BENEFIT PROGRAM APPLICANT GUIDE

Submitted by

TRANServe

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1. **OVERVIEW**

1.1 Background

The Department of Transportation, Transportation Services Division (TRANServe), administers the Parking and Transit Benefits program. This system will serve as the publicly accessible interface for managing Transit benefits. TRANServe Services include purchasing and distributing transit fare media through the TRANServe Debit Card via Economy Act agreements and the authority of the Administrative Working Capital Fund (49 U.S.C. 327). The office currently supports 276 Agencies and sub-divisions, proving timely and efficient transit benefit service to over 200,000 customers, 60,000 of whom use the online Transit Application.

TRANServe has redesigned the current Transit WebApplication into a "new" user friendly, mobile site designed specifically for mobile devices. The mobile version of the WebApplication has been optimized for smaller screens found on mobile phones and tablets. This will allow federal government workers to apply for the transit benefit, request information, withdraw from the program and recertify using a mobile device. Further, TRANServe TBMs, Admins, first, second, and third level approvers will be able to view, update, approve, or disapprove applications from a mobile device from anywhere and at any time.

1.2 **Purpose**

The Transit Benefit Application user guide is designed to provide written instruction on how to use the application effectively and efficiently.

Document Organization 1.3

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 Point of Contacts

The table below provides a list of the people you may contact for additional information regarding the Transit Application or for troubleshooting purposes.

Role	Name/Phone	Title	Email
Coordinator	Christine Wheeler		christine.wheeler@bis.doc.gov
Point of Contact	Makayla Thompson		makayla.thomspson@bis.doc.gov



2. ACCESSING THE TRANSIT BENEFIT APPLICATION

Follow the below steps to navigate to the Login/Register page

- 1. Open an Internet Browser.
- 2. Enter the URL: <u>www.transportation.gov/transerve</u>.
- 3. Click the *Participants* link and scroll down and select your Agency.
- 4. If your Agency requires you to complete the Transit Benefit Integrity Awareness Training; click the <u>New Employee Orientation</u> link. (Follow the instructions to complete the Transit Benefit Integrity Awareness Training).
- 5. Click the *Participants* link and scroll down to select your Agency.
- 6. Select Transit Benefit Program Application System link.

2.1 Login and Registration

Use the following steps to access the application:

1. If registering for the first time, the Login page is displayed after clicking the <u>Transit Benefit Program</u> <u>Application System</u> link.

Returning applicants can enter the URL: <u>http://transitapp.ost.dot.gov</u> to display the Transit Application login page is displayed.

* indicates required field.			
Login			
'User Name:	Government Email Address		
"Password:	Enter password		
	Log In Forgot Pass	word?	
	Not registered yet? Register		
	"WARNING" WARNING"		
	You are accessing a U.S. Government leformation system, which includes the isocrapher, the complete related on which is a connected all other comparies connected by the methods, and allocating metal connected to this compare of deter comparies connected by this information system is provided for U.S. Government use only. Usuan/tocker or improper use of this information system is a localizable action, as well as civil and criminal ponalities. By using this information system you consent to the tolowing:	î	
	 You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system. 	~	
	"WARNING" WARNING **** WARNING**		

Figure 1: Transit Application Log In page

First time users will need to register. Use the following steps to register a username:

- 2. Click the **Register** button. The Register Account Information page is displayed.
- 3. Enter your government issued email address in the User Name textbox.
- 4. Complete the registration form.

Note: * indicates required field.

Note: The agency used in the email for the username will determine the agencies displayed in the Agency dropdown list.

Register Account I	nformation
'User Name:	Government Email Address
"First Name:	First Name
Middle Name:	Middle Name
"Last Name:	Last Name
"Agency/Mode:	VA v Agency options will show once your Government Email Address has been validated
Phone Number:	
	Register Reset Cancel

Figure 2: Register Account Information page



5. Click the **Register** button.

Register Account Ir	formation	
"User Name:	kimberly.j.gravestest@va.gov	
'First Name:	Kimberly	
Middle Name:	L	
'Last Name:	Graves	
*Agency/Mode:	VA	
Phone Number:	Agency options will show once your Government Email Address has been validated (202) 555-4632	
	Register Reset Cancel	

Figure 3: Completed Registration page

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

kimberly.j.gravestest@va.gov is now Registered
Thank you. The Login Password has been sent to kimberly.j.gravestest@va.gov.

Figure 4: Registration Confirmation

After the participant has registered an email will be sent containing a temporary password. Retrieve the password and log into the application using the following steps:

- 7. Enter the username in the User Name textbox.
- 8. Enter the retrieved password in the Password textbox.
- 9. Click the **Log** In button.
- 10. The Change Password page displays.

Login	
'User Name:	kimberly. J. gravestest@va.gov
'Password:	•••••
	Log In Forgot Password?
	Not registered yet? Register
	"WARNING" WARNING" "WARNING"
	You are accessing a LL S downerneet information system, which includes this computer, the computer networks on which is connected, and thene computers connected to its networks, and al storage mode connected to this computer, and antice computers connected to its networks, and al storage mode. U.S downerneet use only inutarized or import use or this information any stem is provided for U.S downerneet use only inutarized or import use or this information any stem in disciplinary action, as well as civil and criminal penalties. By using this information system you consent to the following:
	 You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system.
	"WARNING "WARNING "" WARNING "

Figure 5: Login page



2.2 Change Password

After logging into the application for the first time, it is required that you change the password to something that you will easily remember. Use the following steps to change your password:

- 1. Enter the retrieved password in the Current Password textbox.
- 2. Enter your new password in the Create New Password textbox.
- 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.

Note: * indicates required field.

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.

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

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.

	Current password	
"Create New Password:	New password	
"Confirm New Password:	Confirm New password	
"Create a Hint:	Hint	
	A hint is a meaningful personal association to help you remember your password.	
	Password must be at least 12 characters long No password haracter may be repeated more than 1 time(s) in sequence Password must contain characters the norm at least 4 of the tolowing categories. • Uppercase characters (A through 2) • Lowercase characters (A through 2) • Lowercase characters (a through 2) • Rose 10 digits (0 through 9) • Rose alphatelic characters (of rexample, 1, 5, %)	
	Password will expire 60 days after being set Passwords cannot be reused within the last 24 changes.	
	You will be redirected to the login page and will need to login with your new password	

Figure 6: Change Password page

Your Password has been successfully changed. Use your Username and New Password to login to the system.





Figure 8: Utilities Menu Options



2.3 Password Recovery

Use the following steps to recover your password:

- From the Login page; click the <u>Forgot Password?</u> link. The Forgot Password page displays.
- 7. The Show Hint section allows the user to view the Hint entered when the password was 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.
- 8. The Send It By Email section allows the user to retrieve a temporary password through email. The password will be sent to the email address entered when the account was created. Enter your username and click the **Submit** button.

Note: * indicates required field.

ail Address			
ail Address			
,			
ail Address			
word will be sent to your E-Mail Account.			
	Email Address sssword will be sent to your E-Mail Account.	Email Address ssword will be sent to your E-Mail Account.	

Figure 9: Forgot Password page

	Your hint is displayed below. Please Login.
indicates required field.	
Forgot Password	
Login	
*User Name:	kimberty.j.gravestest@va.gov
*Password:	Enter password
	Hint: Sunday/tow52
	Log In

Figure 10: Show Hint

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

2.4 My Account

The My Account page allows the user to update personal information.

Use the following steps to update your personal information:

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

The information entered when the account was registered is pre-populated in the fields. Update the information as needed.

*First Name:				
	Kimberly	Middle Name: J	*Last Name:	Graves
"Agency/Mode:	VA Agency options will show once Address has been validated	your Government Email		
Phone Number:	(202) 555-4632			

Figure 11: Update My Account 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.

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.

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

Figure 12: Update My Account Confirmation

Home	
Transit Application	
Approval Section 👻	
Utilities -	
My Account	
Change Password	

Figure 13: 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 PTBW 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 PTB PUBLIC WEBSITE HOME PAGE

The tabs and links available to you on the PTB Public Website home page are determined by your assigned user role. User roles are assigned by the system administrator.

The Parking and Transit Benefit Public Website 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 Application Click this tab to display the Select an Action To Continue page.
 - Utilities Click this tab to display My Account and Change Password sub-menu options. If you have access to agency reports the Agency Reports option will display here.
 - 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.
 - My Account Click this button to display the Update My Account Information page.
 - Change Password Click this button to display the Change Password page.
 - Agency Reports There are two types of agency reports. Daily Agency Reports and Monthly Agency Reports. These options are only displayed when assigned by an administrator. Click this button to display the Agency Reports page.

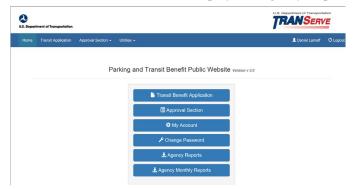


Figure 14: PTB Public Website Home page

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.

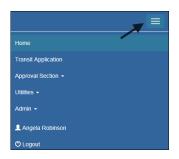


Figure 15: Additional Menu Options



3.1 Transit Benefit Application

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

S

 From the Home page; click the **Transit Benefit** Application button. The Select an Action to Continue page displays.

Note: *The Request Information radio button is selected by default.*

Emple	over: Department of V.A.
۲	Certify/Enroll/Change
	SmarTrip Change \varTheta
	Withdraw from the Program \Theta
0	Request Information 9

Figure 16: Select an Action to Continue page

3.1.1 Certify/Enroll

The Certify/Enroll option allows the applicant to enroll in the transit benefit program by submitting an application. Use the following steps to certify/enroll in the Transit Benefit Program:

- 1. From the Select an Action to Continue page; click the Certify/Enroll radio button.
- 2. Click the **Continue** button. The Warning page is displayed.
- 3. 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.

	WARNING !
pu	is certification concerns a matter within the jurisdiction of an agency of the United States. Making a false, fictilitous or fraudulent certification may constitute criminal violation instabile used Title 16, United States Code, Section 1001, by imprisonment up to the years and fines up to \$10,000 for each offense, and/or agency discuplinary actions up to a fulling 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, watation 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



- 4. Select the reason for certification.
 - Annual Certification/Recertification
 - ♦ Change
 - New Transit Benefit Participant – This is the only available reason for newly registered participants.
- 5. Selection defaults to **Civilian**. Select your Employment Type.
- 6. Selection defaults to **Full Time**. Select your work status.

Note: * indicates required field.

Note: *The identifier label can be renamed or hidden by the Agency TBM.*

Note: Some agencies require the applicants to complete integrity training. If this is required; a checkbox will be displayed when the Annual Certification/Recertification or New Transit Benefit Participant reasons are selected.

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.

Certify/Enroll							
G Transit Benefit Application V	Vorkshee	20					
All Transit Benefit Program Applican					s Transit Corr	mute	
Parking fees are not eligible for th			uded in "Total Monthly Exp	inse".			
Instructions: To calculate your "Tota		y Expense"					
 a. Select your transportation met b. Enter the following information 	n in the "T	To Work" and "From Work" row od of transportation (Metro, B/	(s) of each transportation met	nod:			
 Daily or Monthly Expension 	ise.						
 II. Number of days you rou c. If you purchase a Monthly pasid. The Total Monthly Expense value 	ss, divide alue auto	the price of the pass by 2, and matically populates	enter the information in the M	onthly Exper	ise column.		
'Reason for Certificat						~	
Civilian/Military	ny: 🕤	CIVILIAN				~	
Work Sta	atus;	Full Time				~	
G Transit Benefit Transportatio	on Metho	ids					
Always follow your Agency work sch	iedule pol	icy for specific guidance on the	Days per Month entry.				
Defined work schedule examples: If you work a Basic schedule of	of 8-bour	s per day. The average amount	of 20 Days can be entered int	o the Davs n	er Month colur	ma	
 If you work a Flex Schedule of If you work a Compressed sch 	4 9-hours hedule of	per day, the average amount of 10-hour days, the average am	of 18 Days can be entered into ount of 16 Days can be entered	the Days pe d into the Da	r Month colurr ys per Month	in column	
 If you telecommute or work particular telecommute	art time, e	inter the number of days you a	ctually commute to/from work.				
			t your transportation methods is Rail Other Method	Vannool			
Every Transit Benefit Program Pa	rticipant	is responsible to adjust the	amount of their transit bene	it each	Total M	thly Expense:	S
month to reflect the actual cost of	/ their ho	me to work commute.			, Juan MOR	y capense:	*
G Transit Benefit Program App	plication						
"Identifie	s: \varTheta						
N		SHEPARD (Last)	HANK (First)			V (Middle)	
Email Adds		hank shepardtest@va.gov	(i manj		ork Phone: 😏	(Midule)	NEA
						eve-555-	
Common Identifie	н: <mark>0</mark>						
Department of V.A.							
"Select Your Agenc	y: \varTheta	VA	~		*Region: 🕤		*
'Admi	in: 😡				~		
		Populates from Select Your Ag	ency				
		Please select Admin					
Accounting Cod					Select		
		Click the Select button to selec	t Accounting Code				
Routing Symbol: 🛇		Click the Select button to selec	t Douting Sumbol		Select		
Location/Buildin		CICK INCOLOCI DUILDI ID SCCC	Troubing Cymbu				
Location/Building		Click the Select button to selec	t Location/Building		Select		
	Loortif	that are usual monthly 3					
		ly that my usual monthly 1 eld is automatically calcula	ransit commuting costs	are: 😏			\$
rmation			ransit commuting costs	are: 😏			\$
	This fi	eld is automatically calcula	ransit commuting costs	are: 9			\$
rmation "Work Address:	This fi		ransit commuting costs	are: 9			\$
	This fi	eld is automatically calcula	ransit commuting costs	are: 🕤			\$
"Work Address: "Work Zip:	Work	eld is automatically calcula Address	Tansit commuting costs				\$
"Work Address:	This fi	eld is automatically calcula Address	ransit commuting costs	are: 🕄	•		\$
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"Work Address: "Work Zip: "Work City: e Information	This B Wark Work	eld is automatically calcula Address ZIp	Tansit commuting costs]		\$
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"Work Address: "Work Zip: "Work City: e Information	This B Wark Work	Address Address CBy OS	Tansit commuting costs		1		\$
"Work Address: "Work Zip: "Work City: e Information	This fi	Address Address CBy OS	Tansit commuting costs]		\$
"Work Address: Work Zp: "Work City: e Information "Address:	This fi	Address Address CBy OS	Tansit commuting costs]		\$
"Work Address: Work Zp: "Work City: e Information "Address:	This fi	Address Address CBy OS	Tansit commuting costs				\$
"Work Address: "Work Ztp: "Work City: e Information "Address: "Ztp: "City;	This 6 Work	Address Address CBy OS	"Yansit commuting costs lead "Work State:				\$
Work Zip: Work City: e Information *Address: *Zp:	This 6 Work	Address Address CBy OS	"Yansit commuting costs lead "Work State:				\$
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"Work Address: "Work Zp: "Work City: e Information "Address: "Zp: "City: "Information "Approving Official: • "Point of Costact: •	This B Wark Wark Wark Wark Wark Chick t	ed is automatically calcula Address 20 00 00 00 00 00 00 00 00 00 00 00 00	Tansit commuting costs feed "Work State: "State: teet	· Managet	/Fund Certifie	r: •	uck the Select button to se
"Work Address: "Work Zp: "Work City: e Information "Address: "Zp: "City: Information	This B Wark Wark Wark Wark Wark Chick t	ed is automatically calcula Address 20 00 00 00 00 00 00 00 00 00 00 00 00	Tansit commuting costs feed "Work State: "State: teet	· Managet	/Fund Certifie	r: •	uck the Select button to se
"Work Address: "Work Zp: "Work City: e Information "Address: "Zp: "City: "Information "Approving Official: • "Point of Costact: •	This B Wark Wark Wark Wark Wark Chick t	ed is automatically calcula Address 20 00 00 00 00 00 00 00 00 00 00 00 00	Tansit commuting costs feed "Work State: "State: teet	· Managet	/Fund Certifie	r: •	uck the Select button to se
۲۵۵۳۸ Address: ۱۹۵۳۸ Zpp: ۱۹۵۳۸ City: ۱۹۵۳۲ City: ۱۹۵۳۲ City: ۱۹۵۳۲ City:	This 6 Work Work Work Work Addre Zip City City Citck t Contas	ed is automatically calcula Address 200 200 200 200 200 200 200 200 200 2	*Nork State: Work State: Rect Rect	· Managet	/Fund Certifie	r: •	uck the Select button to se
۲۵۵۳۸ Address: ۱۹۵۳۸ Zpp: ۱۹۵۳۸ City: ۱۹۵۳۲ City: ۱۹۵۳۲ City: ۱۹۵۳۲ City:	This 6 Work Work Work Work Addre Zip City City Citck t Contas	ed is automatically calcula Address 20 00 00 00 00 00 00 00 00 00 00 00 00	*Nork State: Work State: Rect Rect	· Managet	/Fund Certifie	r: •	uck the Select button to se
Work Address: Work Zp: Work City: eInformation 'Address: 'Zp: 'City: 'City: 'Spercoring Official: • 'Point of Contact: •	This 6 Work Work Work Work Addre Zip City City Citck t Contas	ed is automatically calcula Address 200 200 200 200 200 200 200 200 200 2	*Nork State: Work State: Rect Rect	· Managet	/Fund Certifie	r: •	uck the Select button to se





Commuting Distance

- If the Agency is tracking the commuting distance, the **Is your commute greater than 2hrs?** field will be displayed.
- If the commuting distance is greater than two hours, select Yes. The Is your primary address the same as your commuting address? field is displayed.
- If the primary address is different from the commuting address, select No. The Commute Address section is displayed. Enter the address where the commute starts, for instance a commuter bus pick-up location.

Is your commute greater than 2hrs? 😡	Yes v	
Is your primary address the same as your commuting address? 😏	No v	
Commute Address		
*Commute Address: 📀	Commute Address	
Commute Address2:	Commute Address 2	
"Commute Zip:	Commute Zip	
"Commute City:	Commute City Commute State: ~	



7. Select your transportation method(s).

Other Bus

Rail

♦ Bus

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
Other Bus to Work:	Name of Company	\$ Daily Expense	Days per Month	\$ Monthly Expense
Other Bus from Work:	Name of Company	\$ Daily Expense	Days per Month	\$ Monthly Expense
very Transit Benefit Program Participar	nt is responsible to adjust the an	nount of their transit benefit each	Total Monthly Expense:	\$ 0.00

Figure 20: Bus Method

	Name of Company	Daily Expense	Days per Month	S Monthly Expense
Other Bus from Work:		S		S
	Name of Company	Daily Expense	Days per Month	Monthly Expense

Figure 21: Other Bus Method



Figure 22: Rail Method



Other Method



Figure 23: Other Method

Vanpool

Vanpool:	Name of Company	\$ Daily Expense	Days per Month	\$ Monthly Expense
Every Transit Benefit Program Participar	t is responsible to adjust the a	mount of their francit benefit each	Total Monthly Expense:	\$ 0.00

Figure 24: Vanpool Method

Figure 25: Parking Method

\$

Total Monthly Expense: \$ 0.00

Parking

Note: *The Agency must be set up to track* parking costs. The Parking cost is separate from the Transit cost and is not calculated together.

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.

> 8. Fill out the selected method of transportation table for every selected method (i.e. Bus and Rail)

Note: Some agencies require additional transportation information. If this is required; a textbox will be displayed below the Name of *Company field. The additional info label can* be renamed by the Agency TBM.

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

> 9. If the Agency allows the participant to be funded over the current mass transit statutory limit, radio buttons will be displayed giving the customer the option to pay taxes on the exceeded amount.



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 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 line, enter the number of days you actually commute to/from work.

Figure 26: Sample Agency Work Schedule Policies

Bus to Work:	BTW	\$ 2.10	16	\$ 33.60
	Name of Company	Daily Expense	Days per Month	Monthly Expense
	WMATA			
	Additional Info 😔			
Bus from Work:	BFW	\$ 2.10	16	\$ 33.60
	Name of Company	Daily Expense	Days per Month	Monthly Expense
	WMATA			
	Additional Info 🔞			
	Additional mile			

Figure 27: Method of Transportation Table

O I acknowledge my commuting costs are above the current \$130.00 tax free limit and fully understand I will be responsible for paying taxes on the amount I use that exceeds the current tax free limit

O I do not want my monthly funded commuting benefit to exceed the current Transit statutory tax free limit.

Transit Statutory Limit Radio Buttons

- 10. Enter the Identifier. This field is used to uniquely identify the applicant.
- 11. Enter the Common Identifier. Depending on the agency, the Common Identifier can be a debit card activation keyword or number.

Note: *The common identifier label can be renamed by the Agency TBM.*

- 12. Select your Region.
- 13. Select your Admin.
- 14. Depending on the Agency, three optional fields may be displayed (i.e. Accounting Code, Routing Symbol, and Location/Building). Click the Select link to display the available list for your agency.

Note: *The optional field labels can be renamed or hidden by the Agency TBM.*

- 15. Enter your Work Information.
- 16. Enter your Residence Information.
- 17. Click the **Select** button to display the list for your agency's approving officials (1st Approver).
- 18. Select your Approving Official (1st Approver).

Note: If your agency is set-up for Single Approver – First Approve, this will be the only available option.

- Click the Select button to display the list for your agency's manager/fund certifiers (2nd Approver).
- Select your Manager/Fund Certifier (2nd Approver).



Agency Optional Display Fields

Approv	/ing Official				×
	Name			Email	
	Type to filter				
C I	HARRY CAREY			harry.carey@treas.gov	
		<< < 1	>	>>	
					Close

Figure 28: Approving Official

Mana	ager/Fund Certifie	r				×
	Name				Email	
	Type to filter					
C	DARREN CHANG				darren.chang@ed.gov	
C	HARRY CAREY				harry.carey@treas.gov	
		<< <	1	>	>>	
					C	ose

Figure 29: Manager/Fund Certifier



Office of the Secretary of Transportation



- 21. Click the **Select** button to display the list for your agency's point of contacts.
- 22. Select your Point of Contact.

Note: If your agency is set-up for Single Approver – Program Admin (3rd Approve), only a selected POC is required.

Note: *The approver and POC field labels can be renamed by the Agency TBM.*

 Enter your SmarTrip® card information. If you have not purchased or do not use a SmarTrip® card, enter NA. See <u>Appendix A – SmarTrip®</u> <u>Card Instructions</u>.

Note: *This field is only valid for DC, MD, and VA participants.*

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

Note: Work and Residence addresses are verified via the USPS database. Enter the street address and then the zip code. The City and State are auto populated.

25. Click the **Continue** button.

Note: If a smartrip card number was entered in the Smartrip Card Number field, the SmartBenefits® Program page is displayed.

Name		Region	Email
Type to filter		~	
TREASURY POC		DC	vikkey.owens@dot.g
	<< <		

Figure 30: Point of Contact

*Identifier: 📀	****		
Name:	RODRIGUEZ (Last)	(First)	LYNN LEE (Middle)
	Karen.rodrigueztest@treas.gov	"Work Pho	
Email Address:	Karen.roungueziesigureas.gov	"Work Pho	ne: 😔 202-555-7764
Common Identifier: 9	HELLOKITTY		
Department of Treasury			
"Select Your Agency: 😏	TRE-HQ ¥	*Regi	on: O DC
*Admin: 9	TRE-HQ -DC		~
	Populates from Select Your Agency		
Accounting Code: 9		Sele	st
	Click the Select button to select Account		
Routing Symbol: 9		Sele	ct
	Click the Select button to select Routing		
Location/Building: 9		Sele	ct
	Click the Select button to select Locatio		
	I certify that my usual monthly Transit	commuting costs are: 😗	\$ 200.00
	This field is automatically calculated	-	* 100.00
Work Information			
"Work Address:	401 M ST SE		
"Work Zip:	20003		
"Work City:	WASHINGTON	"Work State: DC V	
Horn City.			
Residence Information			
Residence Information 'Address:	1200 NEW JERSEY AVE SE		
*Address:	Address 2		
*Address: *Zip:	Address 2 20590		
*Address:	Address 2	*State: DC 🗸	
*Address: *Zip:	Address 2 20590	*State: DC ▼	
*Adress: "29: "City: Approver Information	Address 2 28590 WASHINGTON		NF: O CAREY, IMBRY
"Address: "Zip: "City:	Address 2 28590 WASHENGTON CAREY, HARRY Select Cick the Select button to select	*State: DC V	Click the Select button to select
*Adress: "29: "City: Approver Information	Address 2 28590 WASHINGTON		
*Address: "Zip: "City: Approver Information "Approving Official: Q	Address 2 2009 WASHINGTON CAREY, HARRY Select Click the Select Aution to select Approving Official	*ManageriFund Certif	Click the Select button to select Manager/Fund Certifier
*Adress: "29: "City: Approver Information	Address 2 28590 WASHENGTON CAREY, HARRY Select Cick the Select button to select	"ManagerFund Certif Manager Pho	Click the Select button to select Manager/Fund Certifier
*Address: "Zip: "City: Approver Information "Approving Official: Q	Adaess 2 20590 20590 WASHINGTON CAREY, HARRY Select Click the Select buffon to select Approving Official TREASURY PDC Select Select	"ManagerFund Certif Manager Pho	Click the Select button to select Manager/Fund Certifier
*Address: "Zip: "City: Approver Information "Approving Official: Q	Address 2 2009 WASHENGTON WASHENGTON CAREY, HARRY Belefit Click the Select button to select Approving Official TREASURY POC Select Click the Select button to select France	"ManagerFund Certif Manager Pho	Click the Select button to select Manager/Fund Certifier
*Address: "Zip: "City: Approver Information "Approving Official: Q	Address 2 2009 WASHENGTON WASHENGTON CAREY, HARRY Belefit Click the Select button to select Approving Official TREASURY POC Select Click the Select button to select France	"ManagerFund Certif Manager Pho	Click the Select button to select Manager/Fund Certifier
*Adfress: '2p: 'Crity: Approver Information 'Approving Official: @ 'Point of Contact: @	Address 2 28599 WASHENGTON WASHENGTON CAREY, HARRY Select Click the Select builton to select Click the Select builton to select TREASURY POC Select Click the Select builton to select Point of Contact NA	"ManagerFund Certif Manager Pho	Click the Select button to select Manager/Fund Certifier
*Address: *2p: *City: Approver Information *Approving Officiat: •	Address 2 28599 WASHINGTON CAREY, HARRY Select CAREY, HARRY Select CAREY, HARRY Select CARE & Select button to select Approving Official TREASURY POC Select Click the Select button to select Point of Contact NA HELP ME HELP YOU	"ManagerFund Certif Manager Pho	Click the Select button to select Manager/Fund Certifier
*Adfress: '2p: 'Crity: Approver Information 'Approving Official: @ 'Point of Contact: @	Address 2 28599 WASHENGTON WASHENGTON CAREY, HARRY Select Click the Select builton to select Click the Select builton to select TREASURY POC Select Click the Select builton to select Point of Contact NA	"ManagerFund Certif Manager Pho	Click the Select button to select Manager/Fund Certifier

Figure 31: Completed Transit Benefit Application



- 26. Click the YES, I would like toenroll button to join the SmartBenefits® program. By clicking yes, you agree to have your transit benefits downloaded to your SmarTrip® card the first of every month.
- 27. Click the **NO Thank You** button if you do not want to join the SmartBenefits® program.
- 28. After clicking the **YES** or **NO** button, the application is submitted and redisplayed with a confirmation message at the top of the page.

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

ne from the Smart Benefits Team will be contacting you shortly



Figure 33: Transit Benefit Program Confirmation



3.1.2 Monthly Certification

If your Agency is participating in The Monthly Certification Program, this option will allow the applicant to recertify without having to update any participant information. There are three types of applications that will meet the requirement. These are: New Transit Benefit Participant, Annual Certification/Recertification, and Monthly Certification.

When an agency is set-up for monthly certifications the participants are required to submit a recertification based on the frequency set by the agency. This could be anywhere from once a month to once a year. When participants are added to the program, notifications are sent via email. This email will contain the status of the online account. If the account is current the email will display the date the current recertification will expire. If the account is in suspended status the email will instruct the participant to submit an application.

Reminder emails will be sent to the participant leading up to the expiration date. If the participant does not submit an application on or before the expiration date the account will be put in suspended status. If the submitted application has been disapproved and sent back to the participant, the online account will remain in suspended status until the application is resubmitted. If the account is suspended the participant will need to submit via the Certify/Enroll/Change page. The available reasons for certification are Annual Certification/Recertification and New Transit Benefit Participant. Selecting Annual Certification will need to be fully processed to finalize the reactivation. An email will be sent to the participant with the next recertification date.

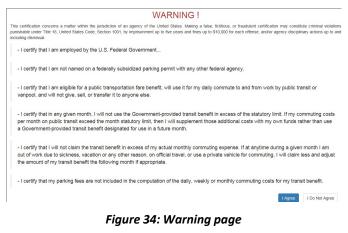
Use the following steps to submit a Monthly Certification application:

- 1. From the Select an Action to Continue page; select the Monthly Certification radio button.
- 2. Click the **Continue** button. The Warning page is displayed.
- 3. 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.

Note: The applicant must be enrolled in the Monthly Certification Program to submit a monthly certification application.

Note: If your agency has disabled the Monthly Certification option on the Select an Action to Continue page, recertify via the Certify/Enroll/Change page.





4. The application displayed is the current application on file. Verify that all prepopulated information is correct and valid.

Note: *The applicant can ONLY update the method of transportation and rates when submitting via the monthly certification page.*

Note: If the address entered when the application was initially submitted is invalid; the monthly certification will not be able to be submitted. The applicant will need to submit an application via Certify/Enroll/Change to update the address.

Note: If the Manager, Supervisor, or POC selected when the application was initially submitted is no longer available for selection; the monthly certification will not be able to be submitted. The applicant will need to submit an application via Certify/Enroll/Change to update the Manager, Supervisor, or POC selections.

Transit Benefit Application Worksh	pet			
All Transit Benefit Program Applicants are r	equired to certify the "Total Monthly Ex	pense" of their Home to Work Mas	s Transit Commute.	
Parking fees are not eligible for the trans	it benefit and must not be included in	"Total Monthly Expense".		
instructions: To calculate your "Total Mont	hly Expense"			
a. Select your transportation method(s)				
 Enter the following information in the i. Name of Company for your me 	"To Work" and "From Work" row(s) of ea ethod of transportation (Metro, BART, Sul	ch transportation method: bwav)		
 Daily or Monthly Expense 		(ind)		
 iii. Number of days you routinely to c. If you purchase a Monthly pass, divid 	te the price of the pass by 2, and enter th	e information in the Monthly Exper	ise column.	
d. The Total Monthly Expense value au Reason for Certification:	tomatically populates			
Civilian/Military:	CIVILIAN			
Work Status:	FULL TIME			
G Transit Benefit Transportation Meth	rods			
f you work 8-hour days, enter 20 in the Day	ys per Month column			
f you work 9-hour days, enter 18 in the Day f you work 10-hour days, enter 16 in the Da	ays per Month column			
f you telecommute or work part time, enter	the number of days you actually commut	te to/from work. transportation methods:		
		Rail Other Method Vanpool	1	
Other Bus to Work:	OBTW Name of Company	\$ 3.10 Daily Expense	20 Days per Month	\$ 62.00 Monthly Expense
	Name or Company	Daily Expense	Days per Month	Monthly Expense
Other Bus from Work:	OBFW	\$ 3.10	20	\$ 62.00
Other Dus from Work:	Name of Company	S 3.10 Daily Expense	20 Days per Month	S 62.00 Monthly Expense
Every Transit Benefit Program Participar		of their transit benefit each	Total Monthly Expense:	\$ 124.00
month to reflect the actual cost of their h	ome to work commute.			
G Transit Benefit Program Application	n			
Smart Benefits Program:	NO			
Identifier:				
Name:	SHANEFELTER (Last)	CHRIS (First)		
		1 4		
Email Address:	chris.shanefelter@treas.gov			
Work Phone:	(202) 555-8989			
Common Identifier:	TEST		Work Zip Code: 20590	
Department of Treasury				
Agency/Mode:	TRE-HQ		Region: DC	
Admin:	TRE-HQ -DC			
	I certify that my usual monthly Transi	it commuting costs are: 0	\$ 124.0)
	This field is automatically calculated			
Work Information Work Address:	36 WORK PLACE			
Work Address: Work City:	36 WORK PLACE	Work State: DC		44444
Work City:	TURK	WORK State: DC	Work Zip:	4444
Residence Information				
Address:	52 HOME PLACE			
City:	HOME	State: DC	Zip:	66665
Approver Information				
Approving Official:	CAREY HARRY	Manage	Fund Certifier: DARREN CH	NG
Approving criteria.	00021,100001	munuge	of the contract of the contract of the	
Point of Contact:	TREASURY POC	2	Manager Phone:	
	NA			
SmartTrin Card Number				
SmartTrip Card Number:				
SmartTrip Card Number: Comment for Agency Approvers: 🕤				
	You have 1995 characters remaining			
	You have 1995 characters remaining			Continue Cance
	You have 1995 characters remaining			Continue Cance

Figure 35: Transit Benefit Program Application for Monthly Certification



Thank you, your Monthly Certification application has been submitted.

Figure 36: Monthly Certification Confirmation



Figure 38: Current Transit Benefit Account

3.1.3 SmarTrip® Change

The SmarTrip® Change option allows the applicant to submit a request to update a SmarTrip® card number associated with the account. Use the following steps to submit a request for a SmarTrip® number change:

- From the Select an Action to Continue page; click the SmarTrip® Change radio button.
- Click the Continue button. The SmarTrip® Change page is displayed.
- 3. Update the SmarTrip® card number.

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

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

Figure 39: SmarTrip® Change page

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

Figure 40: SmarTrip® Confirmation



3.1.4 Withdraw from the Program

The Withdraw from the Program option allows the applicant to submit a request to withdraw from the program at any time. Use the following steps to withdraw from the program:

Approving Official

Name

C

Type to filter.

KIM LYONS

- 1. From the Select an Action to Continue page; click the Withdraw from the Program radio button.
- 2. Click the **Continue** button. The Withdraw from the Program page is displayed.
- 3. Click the pop up calendar to select a withdrawal date.

ninuraw irom the Program			
Identifier:			
Name:	MILLS	SHARONDA	
	(Last)	(First)	
Email Address:	Sharonda.Mills@va.gov		
Agency/Mode:	Department of V.A. (VA)		
*12345: 🜖	(202) 555-4441		
'Withdrawal Date:		=	
	Click the Calendar to select a Withdrawal		
*Approving Official: ()		Select	
	Click the Select button to select Approving	Official	
'Manager/Fund Certifier: 😌		Select	
	Click the Select button to select Manager/	Fund Certifier	
Comment for Agency Approvers: 🥹			
	You have 1995 characters remaining		
			Withdraw

Figure 41: Withdraw from the Program page

Email

kim.lvonstest@va.gov

- Click the Select button to display the list for your agency's approving officials (1st Approvers).
- Select your Approving Official (1st Approvers).

6.	Click the Select button to display
	the list for your agency's
	manager/fund certifiers (2 nd
	Approvers).

 Select your Manager/Fund Certifier (2nd Approver).

Note: If the approval functionality has been disabled by the agency the approval fields will not be displayed and the application is sent directly to TRANServe for processing.

Mana	Figure 42: A	pproving Official (1 st Approver)	Close
	Name	Email	
	Type to filter		
C	GLEN HARPERTEST	glen.harpertest@va.gov	
C	JESSICA MARTIN	jessica.martins@va.gov	
			Close

Figure 43: Manager Fund/Certifier (2nd Approver)



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

Note: *The Comment for Agency Approvers label can be renamed by the Agency TBM.*

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

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.

Thank you, your application to Withdraw from the Program has been submitted.

Figure 44: Withdraw Confirmation

3.1.5 Request Information

The Request Information option allows the applicant to request information from the Agency Program Office by submitting questions regarding the transit benefit program or a submitted application through the Point of Contact (POC). Use the following steps to request information:

- From the Select an Action to Continue page; click the Continue button to display the Request Information page.
- The POC selected on a submitted application 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.
- 3. Select a POC from the list.
- Enter the question or concern in the Question textbox and click the Send Request button.

Request Information			
Name:	Graves	Kimberly	Jessica
	(Last)	(First)	(Middle)
Email Address:	kimberly.j.gravestest@dot.gov		
Agency:	Department of Transportation		
"Point of Contact: 9		Select	
	Click the Select button to select Point of Co	ntact	
"Question:			
			Send Request Cancel

Figure 45: Request Information page

Name	Region	Email	
TREASURY POC	DC	vikkey.owens@dot.gov	
			-





5. An email is sent to the selected TRANServe POC. The Home page is displayed with a confirmation message at the top of the page.

Thank you, your request has been sent.

Figure 47: Request Information Confirmation

3.1.6 Disapproved Applications

Applications that have been Disapproved are sent back to the applicant. If corrections are needed the applicant can make those 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.
- 2. Select the Update Disapproved Application Certification radio button.
- 3. Click the **Continue** button. The Warning page is displayed.
- 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 display the Select an Action to Continue page.

	Your Current Application Status: Certification Disapproved Reason: TEST Disapproval	
Select an Action to Continue		
	Employer: Federal Deposit Insurance Corporation	
	Request Information	
	O Update Disapproved Certification	
	Continue	
	Conende	

Figure 48: Select An Action To Continue page

	WARNING !
punisha	entification concerns a matter within the jurisdiction of an agency of the United States. Making a faise, fictitious, or flaudulent centification may constitute criminal violation be under Title 16, United States Code, Section 1001, by imprisonment up to the years and times up to \$10,000 for each offense, and/or agency discplinary actions up to a grammadia.
-1	certify that I am employed by the U.S. Federal Government
-1	certify that I am not named on a federally subsidized parking permit with any other federal agency.
	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 npool, and will not give, sell, or transfer it to anyone else.
pe	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 rmonth on public transit exceed the month statutory limit, then I will supplement those additional costs with my own funds rather than use 3overnment-provided transit benefit designated for use in a future month.
ou	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 to frwork due to sickness, vacation or any other reason, on official travel, or use a private vehicle for commuting. I will claim less and adjust a amount of my transit benefit the following month if appropriate.
-1	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 49: Warning page



Transit Benefit Program Applicant Guide

- The reason the application was disapproved is displayed at the top of the Transit Benefit Application Worksheet and the Transit Benefit Program Application.
- The applicant's information entered when the application was submitted is displayed in the fields. Make the noted 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 require the applicant to complete and resubmit a new application.

Note: If a Monthly Certification was disapproved, the applicant will need to click the Delete Application and Start Over button to resubmit the application via Certify/Enroll/Change to make the necessary corrections.

Office of the Secretary of Transportation

		Debte Application and Start Over
		Disapproved Reason: Last 4 SSN not entered. Please enter and resubmit.
<form><pre>decimation of the second second</pre></form>		
	Certify/Enroll Status: Ceruncal	on Disapproved
<form></form>	G Transit Benefit Application Worksho	of l
<form></form>		
<pre> • • • • • • • • • • • • • • • • • • •</pre>		
	 Enter the following information in the ' Name of Company for your me 	'To Work' and 'Treem Work' row(s) of each transportation method: thod of transportation (Wetro, BART, Sabway)
<pre>a la biologie par une standard program</pre>	 Daily or Monthly Expense Number of days you routinely v Kynu numbers a Monthly pass, divide 	ork in a month
 cutation of the second s	d. The Total Monthly Expense value aut	omatically populates
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Figure 50: Disapproved Transit Benefit Application Worksheet



4. AGENCY REPORTS

Use the following steps to download an agency report:

- 1. From the Home page; click the **My Account** button. The Update My Account Information page displays.
- 2. Click the applicable password request button. A confirmation message is displayed.

Note: If you have access to both Daily Agency Reports and Monthly Agency Reports, a password button will be displayed for each report type.

- 3. Retrieve the emailed password.
- 4. From the Home page, click the applicable Agency Report button; the agency report page displays.

Note: *The same steps are used to download daily and monthly agency reports.*

5. Click the link to display the Open/Save dialog message.

Note: Click the Open button to display the zip file or click the Save button to choose a location to save the zip file.

6. Extract the files to a selected folder.

Update My Acco	ount Information
Last Updated By:	Robinson, Angela - 12/02/2020 12:36:28 PM EST
*User Name:	daniel.lamuff@archives.gov
*First Name:	Daniel Middle Name: Middle Name "Last Name: Lamuff
*Agency/Mode:	ARCHIVES
	Agency repfores will allow orcea your Government Email Address has been validated
Phone Number:	
Role:	Approving Official Set Role to Applicant
	Hide from Approver Lists
	Allow Withdrawals
	졌 Email Agency Report Password
	St Email Agency Monthly Report Password

Figure 51: Update My Account Information page

Agency Monthly Report Password has been sent.



U.S. Deportment	U.S. Department of Transportation			
Zip Format	EXE Format			
ARCHIVES Monthly Report - Jan 2021	ARCHIVES Monthly Report - Jan 2021			

View and track your downloads	Search	Search downloads		
Name	Location	Actions		
AGENCYMONRzip 45.6 KB transitappmobiledev.ost.dot.gov	Do you want to open or save this file?	Open Save 🔻	×	

Figure 54: Open/Save Dialog Message

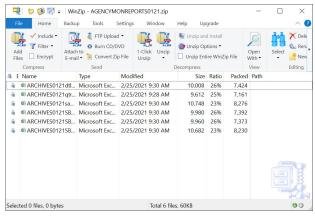


Figure 55: Zip File



Transit Benefit Program Applicant Guide

Office of the Secretary of Transportation

7. Enter the retrieved password and click the **OK** button.

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Enter password:			
✓ Hide the password			
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8. Go to the selected folder and review the downloaded report files.

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Figure 57: Agency Report File



APPENDIX A: SMARTRIP CARD INSTRUCTIONS

For Smart Benefit Participants: Purchase and Register a SmarTrip® card

SmarTrip® card usage is mandatory for all participants in the National Capital Region.

- 1. Purchase a SmarTrip® Card This is a reloadable electronic fare card. Using a reloadable card supports the government's initiatives to support and improve the environment.
 - a. You can do this 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 will require you to provide a shipping address which must match the billing address on line with your credit card provider.

- 2. 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:

Step 1: See if Your Plastic Card Needs to be Replaced.
Flip your card over and look at the numbers on the back. If the sequence matches this card, no further action is needed.
XXXXXX 0167 0000 0000 0000
WORKS. NO FURTHER ACTION NEEDED
Look for the numerals 0167 in the position shown above. All other card types shown below must be replaced.

TIP 1: Enlarge the number on a Xerox machine and attach to your application

