

## **United States Department of Transportation**

# TRANSIT BENEFIT PROGRAM APPROVER GUIDE

Submitted by

### TRANServe

A division of the

### **Office of the Secretary of Transportation**

### **U.S. Department of Transportation**

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### DOCUMENT CHANGE HISTORY

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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 who 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.

## 1.3 Document Organization

The following typographical conventions are used in this user guide:

- Courier New Bold
   <u>Underline Italic in blue</u>
   Title Case plus page
   Indicates a button on a page
   Indicates a link within the system
   Indicates a name of a page in the application
- Italic text
- Indicates a name of a page in the application 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	Machelle Koonce		mkoonce@bop.gov
Transit Office	(202) 307-2068		transitsubsidy-s@bop.gov



# 2. ACCESSING THE TRANSIT APPLICATION

### 2.1 Login

Use the following steps to access the application:

- 1. Enter the URL: http://transitapp.ost.dot.gov. The Transit Application login page is displayed.
- 2. Enter the username in the User Name textbox.
- 3. Enter the password in the Password textbox.
- 4. Click the **Log** In button.

#### Note: \* indicates required field.

**Note:** Approvers must register to be added to the web application. However, they do not have to enroll in the transit benefit program. Once the user has registered the User Role will be elevated from Applicant to the applicable approval level.

Department of Transportation		TRANSERVE Business in motion	
* indicates required field.			
Login			
'User Name:	Government Email Address		
"Password:	Enter password		
	Log In Forget Pass	word?	
	Not registered yet? Register		
	"WARNING" WARNING"		
	You are accessing a U.B. Government information system, which includes the computer. The computer network on which is a connected, all other comparies connected to the network, wal a bring connected to this computer or other comparies on the network. This information system is provided for U.S. Government use only, funkationated interpret rate of the information may result in despitalary action, as well as civil and criminal penalties. By using this information system you consent to the following:	Î	
	<ol> <li>You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system.</li> </ol>	~	
	"WARNING" WARNING"		
		Friday, Jan	

Figure 1: Transit Application Log In page



### 2.2 My Account

The My Account page allows the user to select a proxy. The functionality to assign a proxy is available for Approving Officials: Supervisors, Managers, and Program Admins.

Use the following steps to select a proxy:

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

Available supervisor and/or managers will be displayed in the Add select box.

2. Select the proxy. Click the **Add** button to add the proxy to the column on the right.

"User Name:	christine.golladay@dot.gov				
'First Name:	Christine	Middle Name:	Nari	"Last Name:	Golladay
"Agency/Mode:	DHS-CIS DHS-ICE	~			
	DOJ-FEDERAL DETENTION DOT-BTS	~			
	Agency options will show once your o Address has been validated	Government Email			
Phone Number:	202-555-3252				
Role:	Approval/Supervisor				
	Reports				
		😫 Email Agency	Report Paseword		
		SUPERVIS	SOR Proxy		
	(not selected)			(selected)	
	Donavon, Matt (DOT-OST-M1- SE	)			
	Add >>			<< Remove	
	Us	ers who have you a	s proxy: Matt Donavon		
		MANAGE	ER Proxy		
	(not selected)			(selected)	
	Bellet, Craig (DOT-OST-M1- SE) Donavon, Matt (DOT-OST-M1- SE Mello, Deborah (DOT-OST-M1- SE Smith, Kim (DOT-OST-M1- SE)	)			
	Add >>			<< Remove	
	Users wi	ho have you as pro	ky: Matt Donavon, Kim Smit	h	

Figure 2: Update My Account Information (Proxy)

To remove a proxy from the column, select the proxy and click the **Remove** button.

(not selected)	(selected) Donavon, Matt (DOT-OST-M1-SE)
Add >>	<< Remove

#### Figure 3: Selected Proxy

MANAGER Pr	оху
(not selected)	(selected)
Bellet, Craig (DOT-OST-M1- SE) Donavon, Matt (DOT-OST-M1- SE) Mello, Deborah (DOT-OST-M1- SE) Smith, Kim (DOT-OST-M1- SE)	
Add >>	<< Remove

Approvers that have the logged-on user set as their proxy will be displayed below the table.

**Note:** If the user has access to the Agency Reports a checked box will be displayed on this page and an Agency Reports button will be displayed on the Home page.

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



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

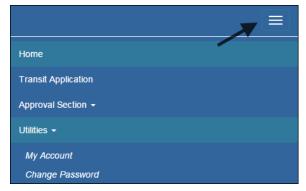


Figure 4: Utilities Menu Options

## 2.3 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.

### 2.4 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 PTB 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.
  - Approval Section This functionality is only available for TRANServe TBMs, TRANServe Admins, System Administrators and Approving Officials: Supervisors, Managers, and Program Admins. Click this tab to display the available approval levels. Approved Records, Disapproved Records and Competed Records can also be accessed from this tab.
  - Utilities Click this tab to display My Account and Change Password sub-menu options.
  - Logout Click this tab to logout of the application.
- The main section of the home page displays buttons representing functions you can execute within the application.
  - Transit Benefit Application Click this button to display the Select An Action To Continue page.
  - Approval Section This functionality is only available for Approving Officials: Supervisors, Managers, and Program Admins. Click this button to display the approval 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.

U.S. Departme	ent of Transportation			TRANSERV	
Home	Transit Application	Approval Section +	Utilities •	L Christine Golladay	🔿 Logout
		Pa	rking and Transit Benefit Public Website Version v 3.0		
			Transit Benefit Application		
			Approval Section		
			🌣 My Account		
			Agency Reports		
Accessibility   Ethics   FOI	A   Information Quality   No Fear	Act   OID Hotine   Payment Accuracy	y   Privary Policy   Regulatores   Small Business   USA.gov   Web Policies & Notions   Webarlscone.gov	Thursday, Au	ugust 23, 2018

Figure 5: PTB Public Website Home page



# 4. APPROVAL SECTION

The Approval Section allows the user to approve or disapprove transit benefit applications and withdrawals. The user must be a Supervisor, Approval Officer or 1<sup>st</sup> Approver, Approval/Supervisor (a combination of the 1<sup>st</sup> and 2<sup>nd</sup> Approvers), Manager/Fund Certifier or 2<sup>nd</sup> Approver, Program Admin or 3<sup>rd</sup> Approver user within the agency that the application is being submitted.

### 4.1 Approval Process

- 1. Log on as an approver.
- 2. From the Home page, click the **Approval Section** button; the approval page is displayed.

**Note:** Applications can be reviewed, approved or disapproved on the Transit Benefit Worksheet/Application page by clicking the View button for the desired applicant.

cartment of Tra	ansportation							ss in motion
e Transit	Application Appl	roval Section + Ut	ilities • Admin •				1 Angel	a Robinson
Pending	Transit Appli	cation 🕲 🛛 🗛	proving Official					
5								
	Mode	Admin	Request Date	Туре	Name	¢		
	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter			
Sev Vew	DOT-FAA	AST	01/07/2016	Rate Change	PARKER DUNPHY	Approve	Disapprove	X Delete
Sev.	DOT-OST-M	OST-M	12/06/2015	SmarTrip and Rate Change	ANGELICA BERKENBILE	Approve	Disapprove	X Delete
Se Vew	DOT-OST-M	OST-M	01/20/2016	Monthly Certification	ROBERT REED	Approve	Disapprove	R Delete
Ser View	DOT-TBM	BTS	01/13/2016	12345	JAMES PERRY	Approve	Disapprove	× Delete
Sev.	DOT-TBM	BTS	01/13/2016	12345	JOSEPH WILSON	Approve	Disapprove	X Delete
Ser Vew	TRE-HQ	TREASURY	01/19/2016	Rate Change	KAREN RODRIGUEZ	Approve	Disapprove	X Delete
Ser View	VA		01/07/2016	Agency Change	ANDREW FENSTERMACHER	Approve	Disapprove	× Delete
Ser Mew	VA		01/19/2016	Withdraw from the Program	SHARONDA MILLS	Approve	Disapprove	X Delete
			<	< 1 > >>				
			Noto: I	Paging will reset your select	ions		Proce	ss Reset

The number of applications awaiting approval

is displayed next to the page title.

- 3. Select **Approve** to approve the application. After the selection is made the label will change into a checkmark.
- 4. Select **Disapprove** to disapprove the application. After the selection is made the label will change into a checkmark. A reason is required when an application is disapproved. Enter a reason in the Reason textbox.

The number of selected applications is displayed next to the **Process** button.

5. Click the **Process** button to approve or disapprove the selected applications.

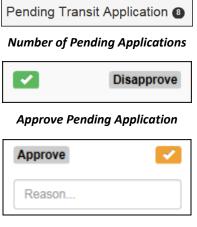
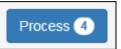


Figure 6: Approval page

**Disapprove Pending Application** 



Number of Selected Applications to be Processed



### 4.1.1 Commuting Distance

**Note:** If the Agency is tracking the commuting distance, the Approve and Disapprove buttons will not be displayed. The Approver will need to review the commuting distance address before the application can be processed.

- Click the View button to display the Transit Benefit Application Worksheet.
- 2. Check the I acknowledge that I have reviewed the Commuting Distance Information for the application checkbox to enable the Approve and Disapprove buttons.

ARCHIVES ARCHIVES	02/25/2021	Annual Certification/Recertification	TOM PETTYWORTH	02/25/2021	× Delete
Is your Commute greater than 2 hrs	?: Y				
Is your Primary Address same as yo Commuting Address					
Commute Addres					
	BOWIE MD	20716			
	I acknowled	lge that I have review	ed the Comm	uting Distance information for this app	licatio

**Note:** Applicants displayed on the active page can be filtered by entering in the first few letters of the Mode, Admin, Type, and Name. To filter by date, enter in the date benefits were requested in the Request Date filter textbox.

**Note:** Click the arrows next to the column headers to sort applicants in ascending or descending order.

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

Mode	\$ Admin	\$ Request Date	\$ Туре	•	Name	\$
Type to filter.	Type to filter	Type to filter	Type to filter		Type to filter	

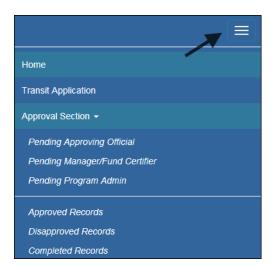


Figure 7: Approval Section Menu Options



### 4.1.2 Delete Application

- 1. From the Approval page; click the **Delete** button. The Delete Confirmation message is displayed at the top of the application page.
- 2. Click the **Continue** button to delete the application. The approval page is re-displayed with the delete confirmation at the top of the page.

**Note:** The submitted application will be deleted and the applicant will need to resubmit the application.

Are you sure you want to delete the following Transit Application? Click the Continue button below to delete the Transit Application. Click the Cancel button to return to the previous page.
Continue Cancel
Certify/Enroll (KAREN RODRIGUEZ) Status: Certification Pending (Approving Official)
C Transit Benefit Application Worksheet
All Transit Benefit Program Applicants are required to certify the "Total Monthly Expense" of their Home to Work Mass Transit Commute.
Parking fees are not eligible for the transit benefit and must not be included in "Total Monthly Expense".
Instructions: To calculate your "Total Monthly Expense"

Figure 8: Delete Confirmation page

## 4.2 Approved/Disapproved/Completed Records

From the Home page; hover over the Approval Section menu option. Select the type of records to be viewed by selecting the link name.

	Mode			Type				
	Mode 0	Admin	 Request Date	Туре	Name	9	Approval Date	
	Type to filte	Type to filter	Type to filter	Type to filter	Type to filter			
Ser View	DOT-OST-M	OST-M	05/19/2014	New Transit Benefit Participant	RAE SUNSHINE		05/19/2014 03:55:20:PM	× Dele
Sev	DOT-OST-M	OST-M-01	01/13/2016	12345	HUNG_TEST CHUN		01/13/2016 01:15:53:PM	× Dele
🖀 View	FDIC		12/22/2015	New Transit Benefit Participant	KAMERON GRETCHENTEST		01/07/2016 01:06:24:PM	X Dele

#### Figure 9: Approved Records

	Mode 0	Admin	Request Date	Туре	0 Name 0	Reason	
	Type to filte	Type to filter	Type to filter	Type to filter	Type to filter		
Ser View	DOT-OST-M	OST-M-01	07/07/2015	SmarTrip and Rate Change	MOBILE APPTEST	TEST	× Delet
🖀 View	ED	OUS	10/30/2015	Rate Change	DARREN CHANG	ghfcfgnhfg	× Delet
<b>⇔</b> ∨iew	FDIC	DC	10/29/2015	Rate Change	PAMELA	TEST Disapproval	× Delet

Figure 10: Disapproved Records

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

**Note:** At least one search criteria field should be entered; if no search criteria are entered the system will retrieve and display all

Find Completed App	plications		
First Name:	First Name		
Last Name:	Last Name		
Agency/Mode:	~		
	"NOTE: Leave all fields blank to Find all Completed Applications.		
	Enter any portion of your desired search criteria. The system will search for all entries that begin with the entered values.		
		Search	Cancel

#### Figure 11: Find Completed Applications page

Mode	Admin	Request Date	0 Туре	Name     Name	φ
Type to	filter Type to	Type to filter	. Type to filter	Type to filter	
DOD-NCR	A-NGB	12/30/2015	Agency Change	ANNIE AARON	
DOT-FTA	FTA	09/03/2015	TEST CERTIFICA	ATION HUNG CHUN	

Figure 12: Completed Records



completed records.

# 5. 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	punt 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 *Lest Name: Lamuff
*Agency/Mode:	ARCHIVES
Agonoyanous.	
	Agency options will show once your Government Email Address has been validated
Phone Number:	
Role:	Approving Official Set Role to Applicant
	Hide from Approver Lists
	Allow Withdrawals
	전 Email Agency Report Password
	🖼 Email Agency Monthly Report Password

Figure 13: Update My Account Information page

Agency Monthly Report Password has been sent.

#### Figure 14: Agency Report Password Confirmation page

gency Monthly Reports		
	Q U.S. Department	of Transportation
	Zip Format	EXE Format
	ARCHIVES Monthly Report - Jan 2021	ARCHIVES Monthly Report - Jan 2021

Figure 15: Agency Reports page

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

#### Figure 16: Open/Save Dialog Message

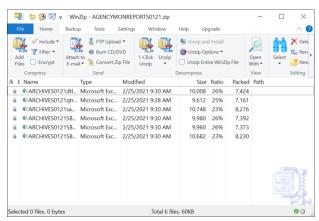


Figure 17: Zip File



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

Decrypt			$\times$
Enter password:			
✓ Hide the password			
ОК	Cancel	Help	

Figure 18: Zip File Password

8. Go to the selected folder and review the downloaded report files.

File Home Insert Dra													
AL X Out Calibri Babe Phi Copy - Coptourd G	U · D · D · Z	· = = = = =	Wrap Test     Marga B. Car	nter = \$ = % 3 5 Number	Conditional Conditional Formatting	Format as Cel • Table • Style Styles	dl Incert	Dekte Form Crifts	3 🖬 ni -		Z T Sort & Fi Filter * Se		
A		6	D		F G	н			×	1.1	N	N	
1	0			Feb-25-2021					~		14		
7 Administration	Number Issued		YTD Num Issued	YTD Amt Issued									
	0		0	\$0.00	1								
9 ITAYA, JANET	0	\$0.00	0	\$0.00	-								
9 ITAYA JANET 10 NGR-901-GALTEST,CAROLYN	0	\$0.00 \$0.00	0	\$0.00 \$0.00	-								
9 17.8YA, JANET 10 NOR-101 - GALITEST, CAROLYN 11 OST-WCP III-10 - 4201001633	0 0 0	\$0.00 \$0.00 \$0.00	0 0 0	\$0.00 \$0.00 \$0.00	-								
9 (TAYA, JANET 10 NOR-101 - GALITEST, CAROLYN 11 OST-WCP IN-10 - 4201001033 12 ROORKUEZ, ESPELLA	0 0 0 0	\$0.00 \$0.00 \$0.00 \$0.00	0 0 0	\$0.00 \$0.00 \$0.00 \$0.00	-								
B ARCHIVES     INVA, JANET     INVA, JANET     INVA, JANET     OST-WCP IN-IO - 4201001633     COST-WCP IN-IO - 4201001633     SOHOLEX.ESPELIA     SOHOLEX.ESPELIA     SOHOLEX.ESPELIA     Teat:	0 0 0	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	0 0 0	\$0.00 \$0.00 \$0.00	-								
9 07474, JANET 10 7629 01-08L1T051, CARCK VN 10 051 W071 M0- 4000016133 12 00CMW02E, ESPELIA 13 USHORNO, LAURE 14 Teal: 15 15 16 17 T0174.: 18 19	0 0 0 0 0	50 00 50 00 50 00 50 00 50 00 54 80	0 0 0 0 0 0	80.00 80.00 80.00 80.00 80.00 80.00									
9 0747A, JANET 10 7620 401 - GALLTEST, CARCA YN 10 7620 401 - GALLTEST, CARCA YN 10 GRT WUT WE 40 - ADDIBINES 12 GRUCKHOOL, LAURE 13 GRUCKHOOL, LAURE 13 GRUCKHOOL, LAURE 14 Teal 15 16 17 TOTAL: 18 19 21	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	50 00 50 00 50 00 50 00 50 00 54 80	0 0 0 0 0 0	80.00 80.00 80.00 80.00 80.00 80.00									
9 17XA JANET 10 1027 8-01 - GALTEST CARCUM 10 057 W/07 8-10 - 6201081633 10 057 W/07 8-10 - 6201081633 10 057 W/07 8-10 - 6201081633 11 057 W/07 8-10 - 620108163 12 057 W/07 8-10 - 62010816 13 054000 (JAURE 14 0540 15 05 16 05 17 10 74L1 18	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	50 00 50 00 50 00 50 00 50 00 54 80	0 0 0 0 0 0	80.00 80.00 80.00 80.00 80.00 80.00		4							

Figure 19: Agency Report File

