



**United States Department of Transportation**

**TRANSIT BENEFIT PROGRAM APPLICANT  
GUIDE**

Submitted by

**TRANServe**

A division of the

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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.

## 1.3 Document Organization

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
<p>Please visit the Agency Participant Page for Point of Contacts:  <a href="https://www.transportation.gov/transerve/participants/federal-deposit-insurance-corporation-fdic">https://www.transportation.gov/transerve/participants/federal-deposit-insurance-corporation-fdic</a></p>			



## 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: [www.transportation.gov/transerve](http://www.transportation.gov/transerve).
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 [New Employee Orientation](#) 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 [Transit Benefit Program Application System](#) link.  
Returning applicants can enter the URL: <http://transitapp.ost.dot.gov> to display the Transit Application login page is displayed.

**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.

**Figure 2: Register Account Information page**



5. Click the **Register** button.

**Figure 3: Completed Registration page**

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

**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.

**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:

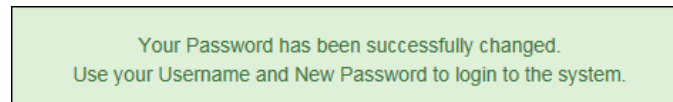
1. Enter the retrieved password in the Current Password textbox.
2. Enter your new password in the Create New Password textbox.
3. Reenter your new password in the Confirm New Password textbox.
4. Enter a hint, something that will remind you of your password in the Create a Hint textbox.
5. Click the **Submit** button.

**Figure 6: Change Password page**

**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.

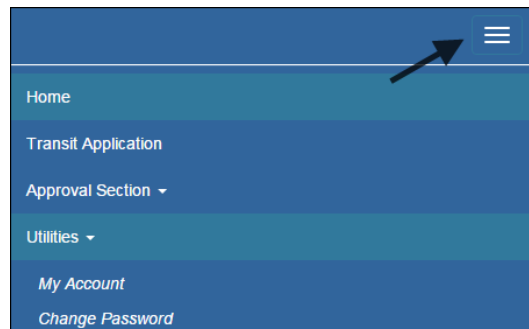
The confirmation message is displayed at the top of the Login page.



**Figure 7: Change Password Confirmation**

**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.



**Figure 8: Utilities Menu Options**



## 2.3 Password Recovery

Use the following steps to recover your password:

6. From the Login page; click the [Forgot Password?](#) 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.

**Figure 9: Forgot Password page**

**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.

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

## 2.4 My Account

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

Use the following steps to update your personal information:

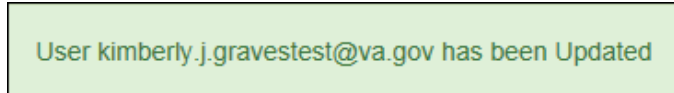
1. From the Home page; click the **My Account** button. The Update My Account Information page displays.

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

**Figure 11: Update My Account page**



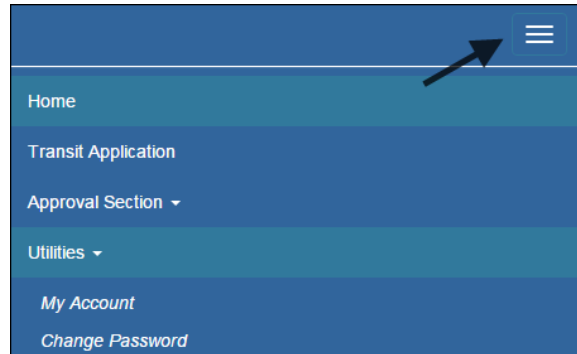
2. Click the **Update** button. The modified account information is saved and the Home page is displayed with a confirmation message at the top of the page.



**Figure 12: Update My Account Confirmation**

**Note:** To access the additional Utilities menu options from a mobile device; click the additional menu 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.




**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

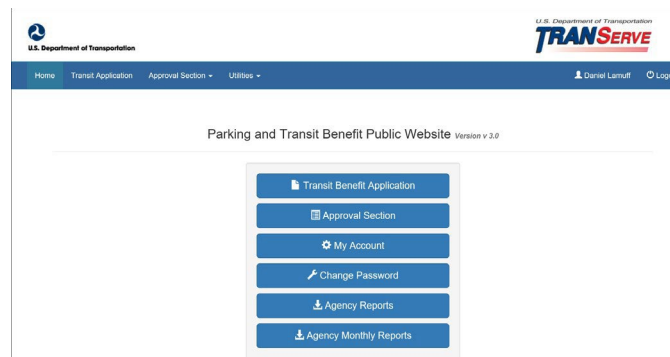
- To exit the system from a desktop, click the **Logout** button on the PTBW home page.
- To exit the system from a mobile device, click the additional menu button  at the top of page. Click the Logout button. The Login page is displayed.

### 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.

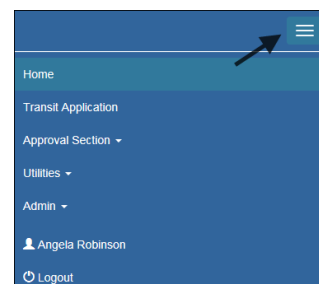
The Parking and Transit Benefit Public Website home page is divided into two sections:

- 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.

1. 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.*

**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.*

**Figure 17:** Warning page

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.

The screenshot shows a web-based application form for a transit benefit program. The form is titled "Certify/Enroll" and is divided into several sections:

- Transit Benefit Application Worksheet:** Contains instructions for certifying the "Total Monthly Expense" and lists transportation methods (Bus, Other Bus, Rail, Other Method, Vanpool). It includes a "Reason for Certification" dropdown menu and "Civilian/Military" and "Work Status" dropdowns.
- Transit Benefit Program Application:** Includes fields for Name (Last, First, Middle), Email Address, Work Phone, and Common Identifier. It also has a "Department of V.A." section with "Select Your Agency" and "Region" dropdowns, and an "Admin" dropdown.
- Work Information:** Includes fields for Work Address, Work Zip, Work City, and Work State.
- Residence Information:** Includes fields for Address, Address 2, Zip, and City.
- Approver Information:** Includes fields for Approving Official, Manager/Fund Certifier, Point of Contact, and Manager Phone.

At the bottom of the form, there are fields for "SmartFrip Card Number" and "Comment for Agency Approvers" (with a character count of 1995 remaining). The form concludes with "Continue" and "Cancel" buttons.

Figure 18: Transit Benefit Application Worksheet



## 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.

7. Select your transportation method(s).

◆ Bus

**Figure 19: Commuting Distance**

**Figure 20: Bus Method**

◆ Other Bus

**Figure 21: Other Bus Method**

◆ Rail

**Figure 22: Rail Method**



◆ Other Method

Figure 23: Other Method

◆ Vanpool

Figure 24: Vanpool Method

◆ Parking

Figure 25: Parking Method

**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.

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

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

Figure 26: Sample Agency Work Schedule Policies

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

Figure 27: Method of Transportation Table

**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.

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.  
 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 (1<sup>st</sup> Approver).
18. Select your Approving Official (1<sup>st</sup> Approver).

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

19. Click the **Select** button to display the list for your agency’s manager/fund certifiers (2<sup>nd</sup> Approver).
20. Select your Manager/Fund Certifier (2<sup>nd</sup> Approver).

The screenshot shows a form with three optional fields: Accounting Code, Routing Symbol, and Location/Building. Each field has a text input area and a 'Select...' button. Below each field is a small instruction: 'Click the Select button to select [Field Name]'.

**Agency Optional Display Fields**

The screenshot shows a window titled 'Approving Official'. It contains a table with columns 'Name' and 'Email'. A search box with the placeholder 'Type to filter...' is above the table. One entry is visible: HARRY CAREY with email harry.carey@treas.gov. Below the table is a pagination control showing '<< < 1 > >>'. A 'Close' button is in the bottom right corner.

**Figure 28: Approving Official**

The screenshot shows a window titled 'Manager/Fund Certifier'. It contains a table with columns 'Name' and 'Email'. A search box with the placeholder 'Type to filter...' is above the table. Two entries are visible: DARREN CHANG (darren.chang@ed.gov) and HARRY CAREY (harry.carey@treas.gov). Below the table is a pagination control showing '<< < 1 > >>'. A 'Close' button is in the bottom right corner.

**Figure 29: Manager/Fund Certifier**

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 (3<sup>rd</sup> Approve), only a selected POC is required.*

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

23. Enter your SmarTrip® card information. If you have not purchased or do not use a SmarTrip® card, enter NA. See [Appendix A – SmarTrip® Card Instructions](#).

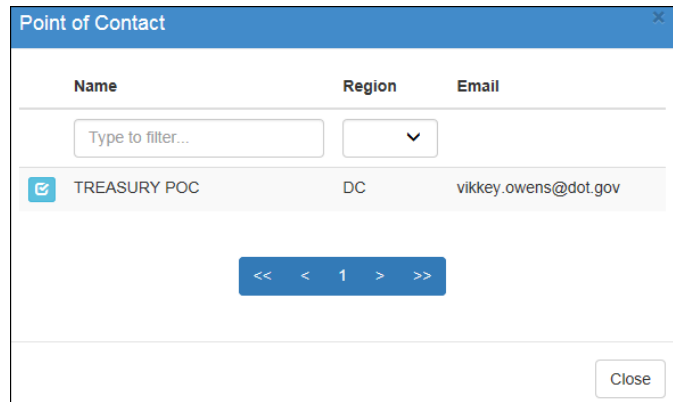
**Note:** *This field is only valid for DC, MD, and VA participants.*

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

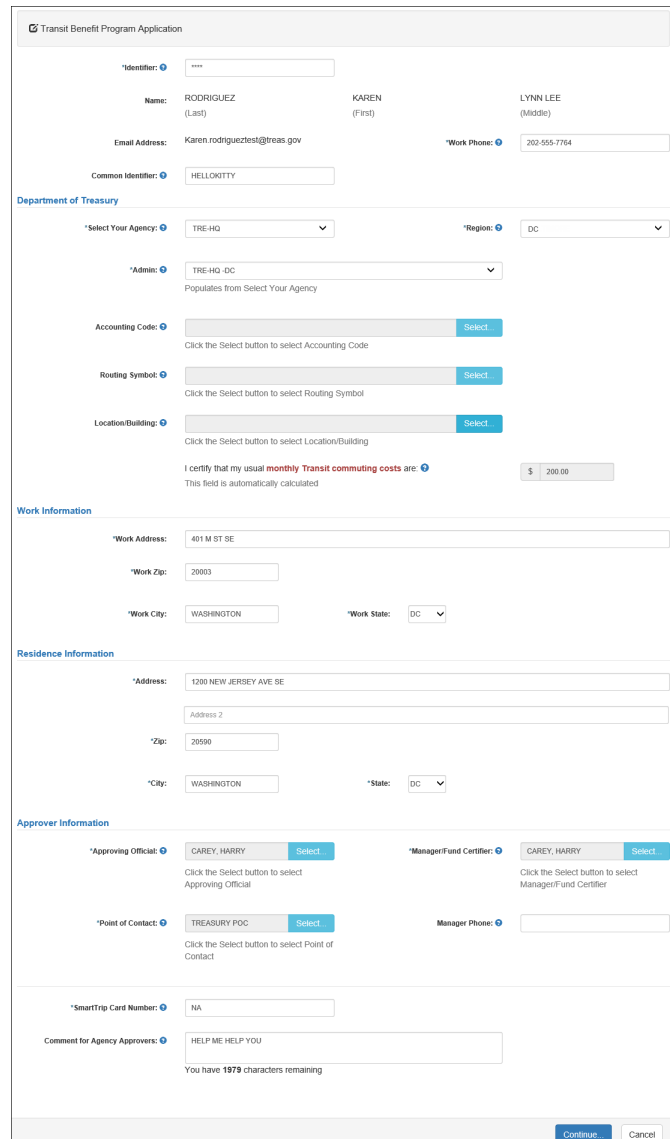
**Note:** *Work and Residence addresses are verified via the USPS database. Enter the street address and then the zip code. The City and State are auto populated.*

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.*



**Figure 30: Point of Contact**

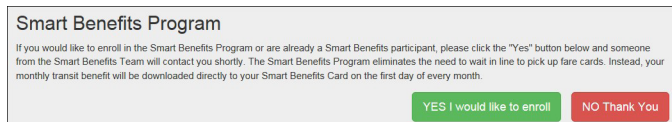


**Figure 31: Completed Transit Benefit Application**

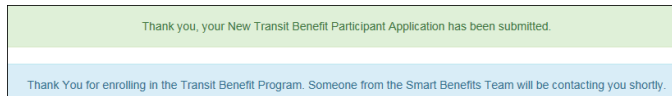


26. Click the **YES, I would like to enroll** button to join the SmartBenefits® program. By clicking yes, you agree to have your transit benefits downloaded to your SmarTrip® card the first of every month.
27. Click the **NO Thank You** button if you do not want to join the SmartBenefits® program.
28. 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.*



**Figure 32: Smart Benefits Program page**



**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/Recertification and submitting an application will reactive the online account. The application 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.

WARNING !

This certification concerns a matter within the jurisdiction of an agency of the United States. Making a false, fictitious, or fraudulent certification may constitute criminal violations punishable under Title 18, United States Code, Section 1001, by imprisonment up to five years and fines up to \$10,000 for each offense, and/or agency disciplinary actions up to and including 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, vacation 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.

**Figure 34: Warning page**



- The application displayed is the current application on file. Verify that all pre-populated 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.*

**Monthly Certification**

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"

- Select your transportation method(s)
- Enter the following information in the "To Work" and "From Work" row(s) of each transportation method:
  - Name of Company for your method of transportation (Metro, BART, Subway)
  - Daily or Monthly Expense
  - Number of days you routinely work in a month
- If you purchase a Monthly pass, divide the price of the pass by 2, and enter the information in the Monthly Expense column.
- The Total Monthly Expense value automatically populates.

Reason for Certification: Monthly Certification

Civilian/Military: CIVILIAN

Work Status: FULL TIME

---

Transit Benefit Transportation Methods

If you work 8-hour days, enter 20 in the Days per Month column  
 If you work 9-hour days, enter 16 in the Days per Month column  
 If you work 10-hour days, enter 16 in the Days per Month column  
 If you telecommute or work part time, enter the number of days you actually commute to/from work.

\*Select your transportation methods:

Bus  Other Bus  Rail  Other Method  Vanpool

Other Bus to Work:	Other Bus from Work:
Name of Company: OBTW Daily Expense: \$ 3.10 Days per Month: 20 Monthly Expense: \$ 62.00	Name of Company: OBTW Daily Expense: \$ 3.10 Days per Month: 20 Monthly Expense: \$ 62.00

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

Total Monthly Expense: \$ 124.00

---

Transit Benefit Program Application

Smart Benefits Program: NO

Identifier: \*\*\*\*

Name: SHANFELTER, CHRIS (L,RES) / CHRIS (F,NO)

Email Address: chris.shanfelter@treas.gov

Work Phone: (202) 555-6969

Common Identifier: TEST

Work Zip Code: 20500

Department of Treasury

Agency/Node: TRE-HQ

Region: DC

Address: TRE-HQ-DC

I certify that my usual monthly Transit commuting costs are: \$ 124.00  
This field is automatically calculated.

Work Information

Work Address: 36 WORK PLACE

Work City: WORK

Work State: DC

Work Zip: 44444

Residence Information

Address: 62 HOME PLACE

City: HOME

State: DC

Zip: 55555

Approver Information

Approving Official: CAREY, HARRY

Manager/Fund Certifier: DARREN CHANG

Point of Contact: TREASURY POC

Manager Phone:

Smart Trip Card Number: NA

Comment for Agency Approvers:

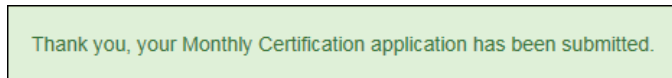
You have 1985 characters remaining

PRIVACY ACT STATEMENT:  
 This notice is provided pursuant to the Privacy Act of 1974, 5 U.S.C. § 552a. This information is collected under authority of 5 U.S.C. § 7905. Furnishing the information on this form is voluntary, but failure to provide all or part of the information may result in disapproval of your request for a public transit fare benefit. The principal purposes of the information are to facilitate timely processing of your request, to ensure your eligibility for transit benefits, and to prevent misuse of the funds provided. This information may be disclosed to the Department of Transportation to perform its duties under an interagency agreement. The information may also be used for production of statistics and reports and for periodic review or reevaluation of transit benefits. Other routine uses are published in the Federal Register at 65 F.R. 18470 (April 11, 2000).

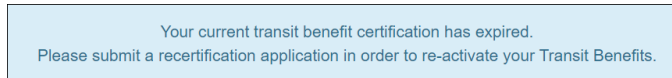
**Figure 35: Transit Benefit Program Application for Monthly Certification**



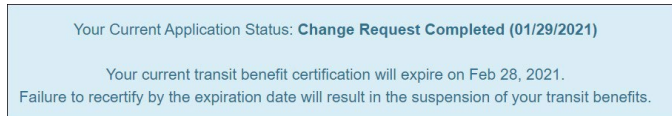
5. Click the **Continue** button. The application is submitted and redisplayed with a confirmation message.



**Figure 36: Monthly Certification Confirmation**



**Figure 37: Suspended Transit Benefit Account**



**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:

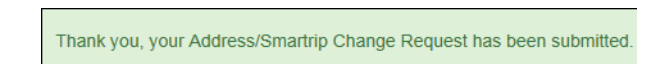
1. From the Select an Action to Continue page; click the SmarTrip® Change radio button.
2. Click the **Continue** button. The SmarTrip® Change page is displayed.
3. Update the SmarTrip® card number.

**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.*

The screenshot shows a web form titled "SmarTrip Change". Under "General Information", there is a field for "Identifier" with four asterisks, a "Name" field split into "QUINTERTEST (Last)" and "BIFF (First)", an "Email Address" field with "biff.quintertest@fdic.gov", and an "Agency" field with "Federal Deposit Insurance Corporation (FDIC)". Under "SmarTrip Information", there is a "SmarTrip Card Number" field with a blue circle icon to its left. At the bottom right are "Submit" and "Cancel" buttons.

**Figure 39: SmarTrip® Change page**

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 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:

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.

Figure 41: Withdraw from the Program page

4. Click the **Select** button to display the list for your agency’s approving officials (1<sup>st</sup> Approvers).
5. Select your Approving Official (1<sup>st</sup> Approvers).

Figure 42: Approving Official (1<sup>st</sup> Approver)

6. Click the **Select** button to display the list for your agency’s manager/fund certifiers (2<sup>nd</sup> Approvers).
7. Select your Manager/Fund Certifier (2<sup>nd</sup> Approver).

Figure 43: Manager Fund/Certifier (2<sup>nd</sup> 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.



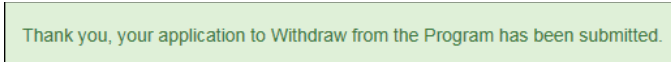


8. Enter any information that will assist your Agency Approver with processing your application in the Comment for Agency Approvers textbox.

**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.*



**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:

1. From the Select an Action to Continue page; click the **Continue** button to display the Request Information page.
2. 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.
4. Enter the question or concern in the Question textbox and click the **Send Request** button.

**Figure 45: Request Information page**

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

**Figure 46: Point of Contact**



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.

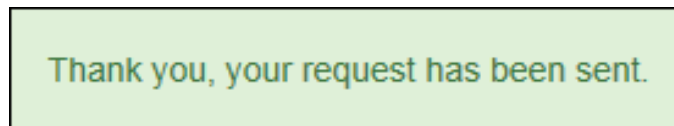


Figure 47: Request Information Confirmation

### 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.

1. 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.
4. After reading the message; click the **I Agree** button. The disapproved Transit Benefit Application Worksheet is displayed.

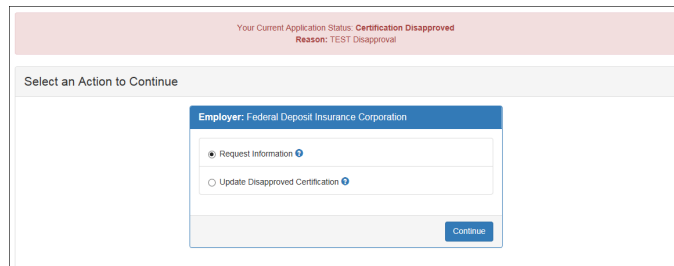


Figure 48: Select An Action To Continue page

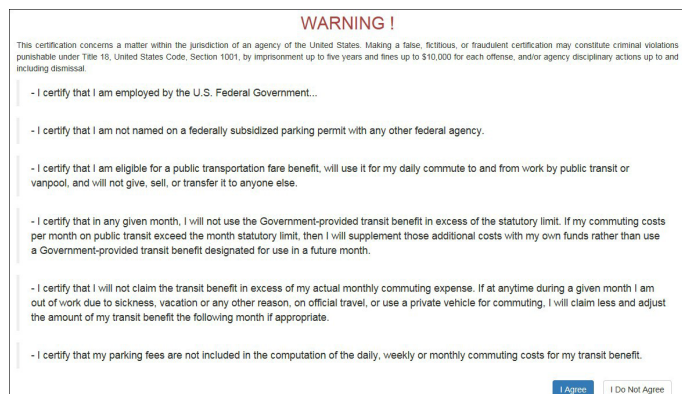


Figure 49: Warning page

**Note:** *If the applicant does not agree, click the I Do Not Agree button to display the Select an Action to Continue page.*



- 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.

The screenshot displays the 'Transit Benefit Program Application Worksheet' interface. At the top, a yellow banner indicates a disapproval: 'Disapproved Reason: Last 4 SSN not entered. Please enter and resubmit.' Below this, the 'Certify/Enroll' status is shown as 'Certification Disapproved'. The form is divided into several sections:

- Transit Benefit Application Worksheet:** Contains instructions for certifying the 'Total Monthly Expense' and provides a table for entering 'To Work' and 'From Work' expenses. The table has columns for 'To Work' and 'From Work' with sub-columns for 'Daily Expense' and 'Days per Month'. A 'Total Monthly Expense' field is also present.
- Transit Benefit Program Application:** A section for personal and employer information. It includes fields for 'Name', 'Email Address', 'Last 4 SSN', 'Federal Deposit Insurance Corporation' (with dropdowns for Agency, Region, and State), 'Accounting Code', 'Routing Symbol', and 'Location/Building'. A 'Work Phone' field is also visible.
- Work Information:** Fields for 'Work Address', 'Work Zip', 'Work City', and 'Work State'.
- Residence Information:** Fields for 'Address', 'Address 2', 'Zip', 'City', and 'State'.
- Approver Information:** Fields for 'Approving Official' and 'Manager/Fund Certifier', each with a 'Select' button. There is also a 'Point of Contact' and 'Manager Phone' field.
- SmartTag Card Number:** A field for the card number.
- Comment for Agency Approver:** A text area for a comment, with a character count of 1998 remaining.

At the bottom right, there are 'Continue' and 'Cancel' buttons.

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

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

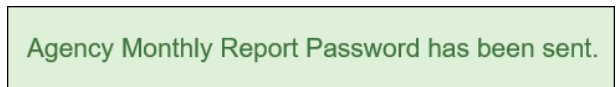
**Note:** *The same steps are used to download daily and monthly agency reports.*

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.

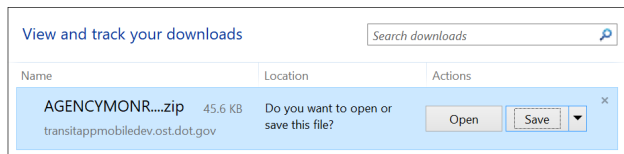
**Figure 51: Update My Account Information page**



**Figure 52: Agency Report Password Confirmation page**

Zip Format	EXE Format
ARCHIVES Monthly Report - Jan 2021	ARCHIVES Monthly Report - Jan 2021

**Figure 53: Agency Reports page**



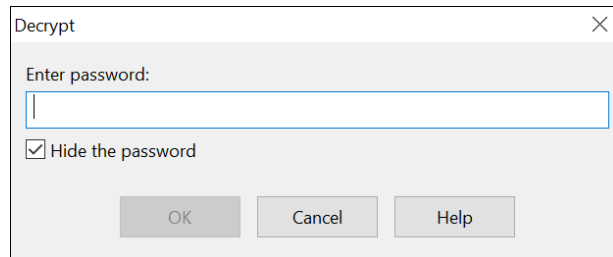
**Figure 54: Open/Save Dialog Message**

Name	Type	Modified	Size	Ratio	Packed	Path
ARCHIVES0121dtdl...	Microsoft Exc...	2/25/2021 9:30 AM	10,008	26%	7,424	
ARCHIVES0121qtr...	Microsoft Exc...	2/25/2021 9:28 AM	9,612	25%	7,161	
ARCHIVES0121sa...	Microsoft Exc...	2/25/2021 9:30 AM	10,748	23%	8,276	
ARCHIVES0121SB...	Microsoft Exc...	2/25/2021 9:30 AM	9,980	26%	7,392	
ARCHIVES0121SB...	Microsoft Exc...	2/25/2021 9:30 AM	9,960	26%	7,373	
ARCHIVES0121SB...	Microsoft Exc...	2/25/2021 9:30 AM	10,682	23%	8,230	

**Figure 55: Zip File**

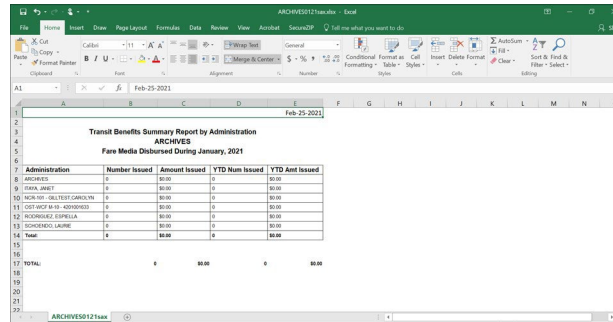


7. Enter the retrieved password and click the **OK** button.



**Figure 56: Zip File Password**

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



**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.



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