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 STATUS

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Author(s)	Angela Robinson
Document Description	This document contains a description of the online transit benefit application and instructions for its use.

DOCUMENT CHANGE HISTORY

The following table summarizes the document change history for the *TRANSIT BENEFIT PROGRAM APPROVER GUIDE.*

Version	Date	Updates By	Description
1.0	8/2018	Angela Robinson	Initial Submission
1.1	2/2021	Angela Robinson	Updates

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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`** 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
Please visit the Agency Participant Page: https://www.transportation.gov/transerve/participants Program Admin: Nora Butler at noralyn.p.butler.civ@health.mil			

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.

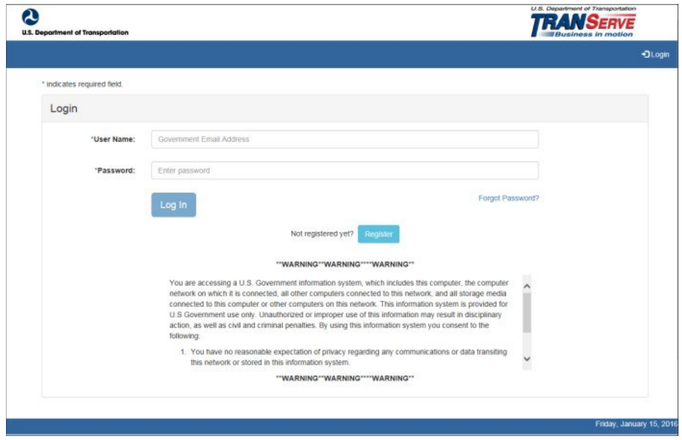


Figure 1: Transit Application Log In page

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.*

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.

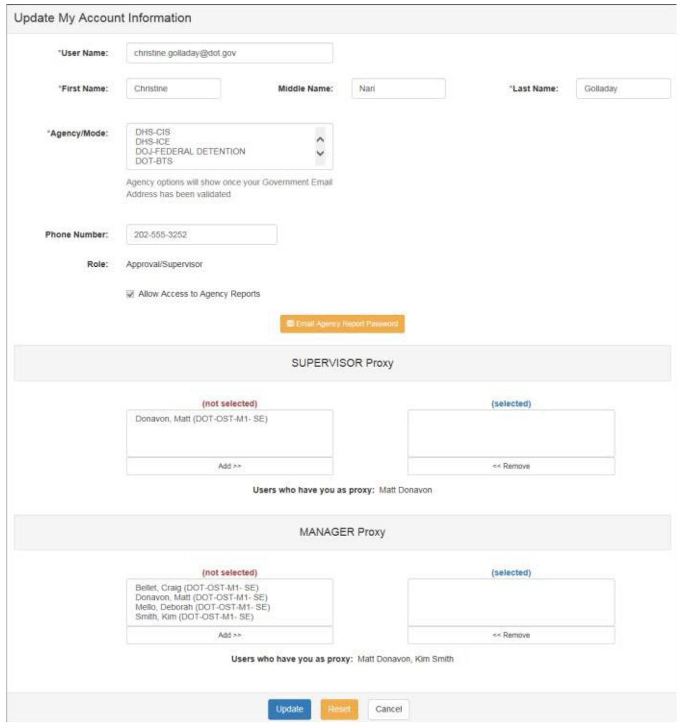


Figure 2: Update My Account Information (Proxy)

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

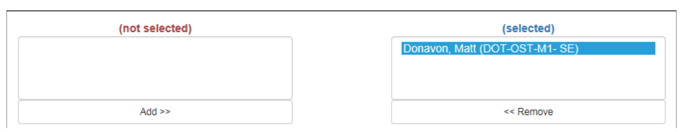
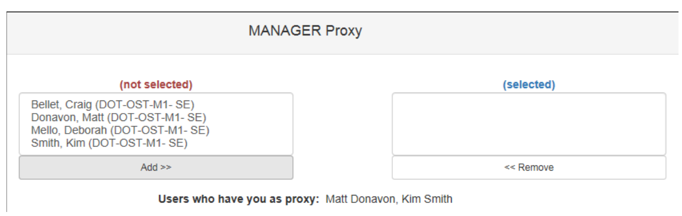


Figure 3: Selected Proxy

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 sub-menus.*

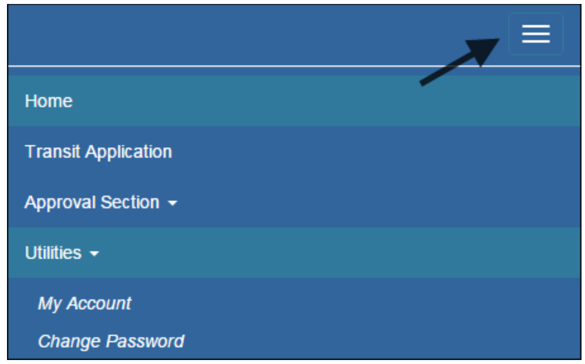


Figure 4: Utilities Menu Options

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.

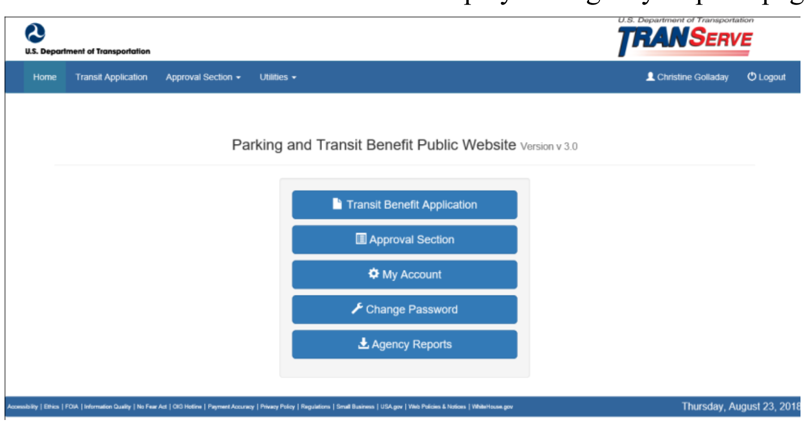


Figure 5: PTB Public Website Home page

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 1st Approver, Approval/Supervisor (a combination of the 1st and 2nd Approvers), Manager/Fund Certifier or 2nd Approver, Program Admin or 3rd 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.*

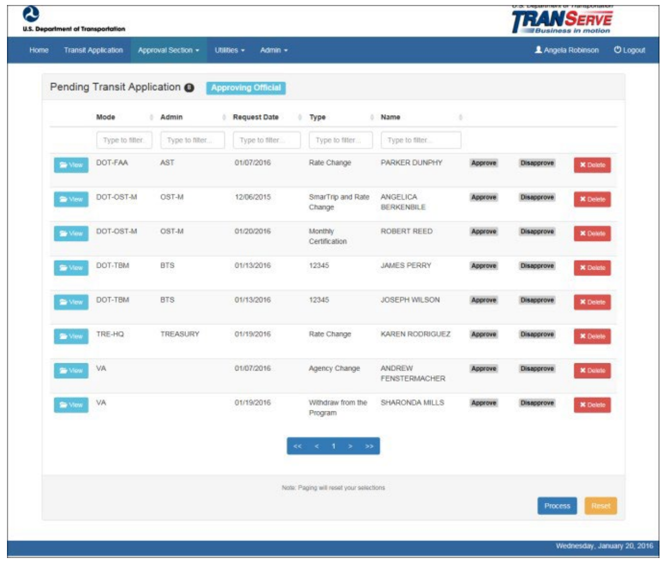
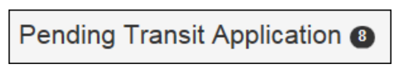


Figure 6: Approval page

The number of applications awaiting approval is displayed next to the page title.

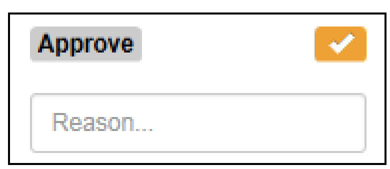


Number of Pending Applications

3. Select **Approve** to approve the application. After the selection is made the label will change into a checkmark.

Approve Pending Application

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.



Disapprove Pending Application

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

Number of Selected Applications to be Processed

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

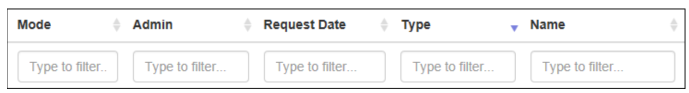
4.1.1 Commuting Distance

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.*

1. 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.

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.*

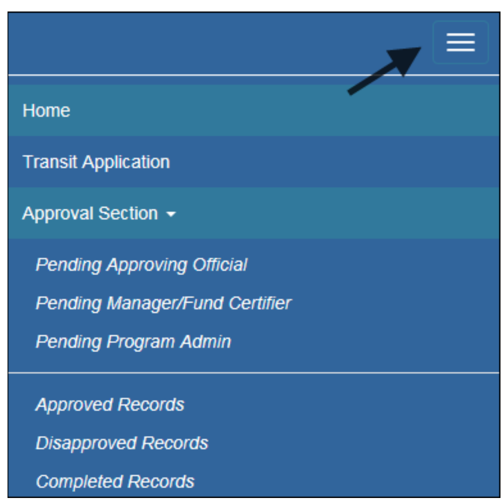


Figure 7: Approval Section Menu Options

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.*

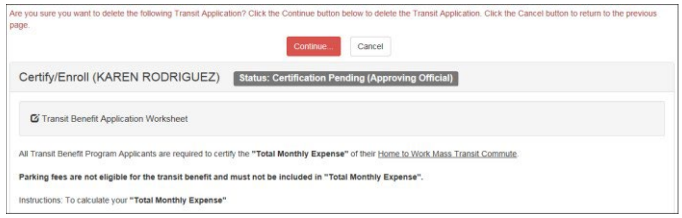


Figure 8: Delete Confirmation page

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.

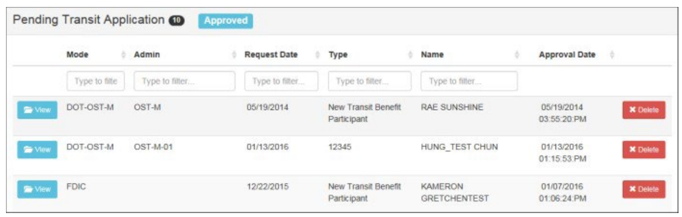


Figure 9: Approved Records

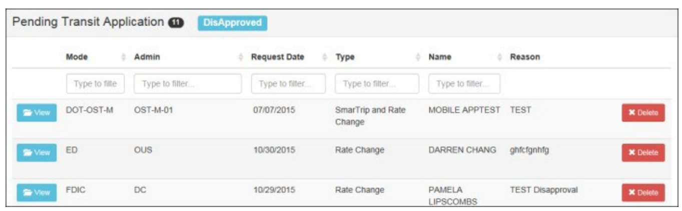


Figure 10: Disapproved Records

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.

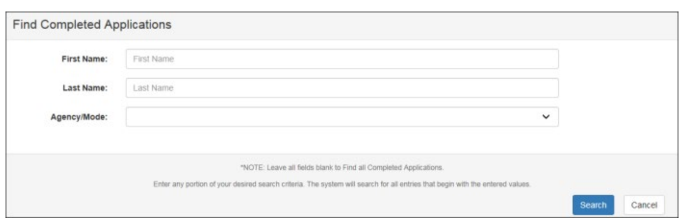


Figure 11: Find Completed Applications page

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

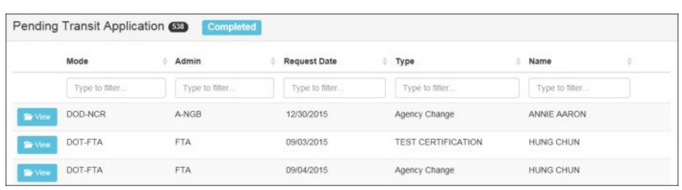


Figure 12: Completed Records

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.*

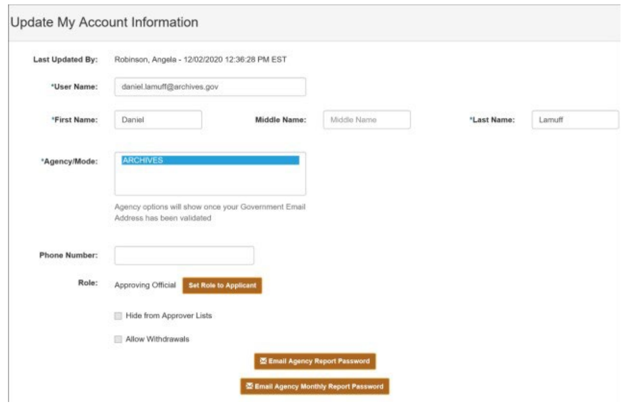


Figure 13: Update My Account Information page

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

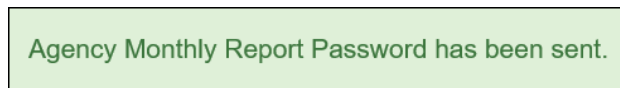


Figure 14: Agency Report Password Confirmation page

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

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

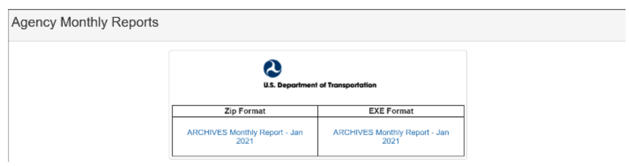


Figure 15: Agency Reports page

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

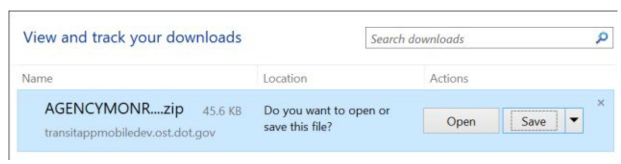


Figure 16: Open/Save Dialog Message

6. Extract the files to a selected folder.

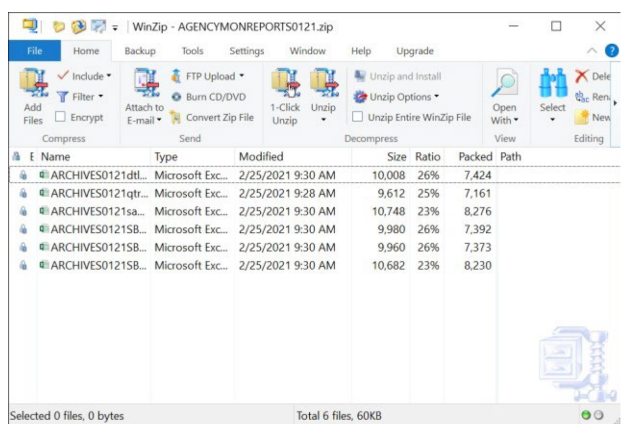


Figure 17: Zip File

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

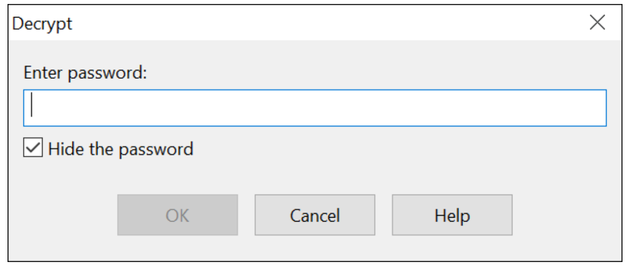


Figure 18: Zip File Password

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

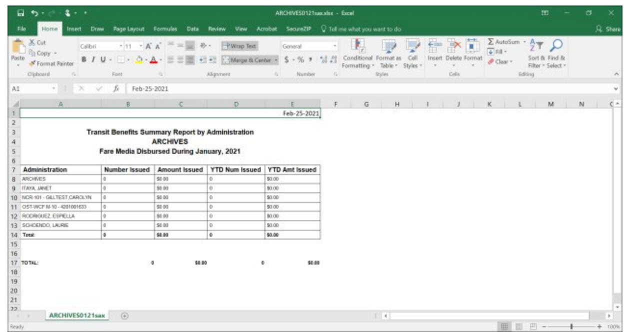


Figure 19: Agency Report File