

# **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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# 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 Web Application into a "new" user friendly, mobile site designed specifically for mobile devices. The mobile version of the Web Application 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
- <u>Underline Italic in blue</u> Indicates a link within the system
- Title Case plus page 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
Visit the Agency Particip	ant Page for agency contac	t information:	
		/department-comm	erce-doc-national-oceanic-and-
atmospheric-administratic	<u>on</u>		



# 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. See the Transit Benefit Applicant Guide for steps to register.

**Note:** Your agency will decide the login method. Either one or both of the methods will be displayed on the page. These methods are PIV or Login.Gov. Participants using the PIV or Network Login method will need an active PIV card. Participants using the Login.gov method will need to link the Transit Benefit Program Web Application to a Login.gov account. Instructions are provided for both of the login methods and can be accessed by clicking the Help icon for the desired login method.



Figure 1: Transit Application Log In page

Department of Transportation		TR	ANSERVE
			•
* indicates required field.			
Login			
	LOGIN WITH YOUR U.S. Department of Transportation Participants	If your are NOT connected to the DOT Network, use the option!	
	PIV or Network Login	Login.Gov	
	Please make sure your card is plugged into the reader or use your Network Login	Please use the botton below to login using Login.Gov authentication.	
	0	LOGIN	
	DODN WITH YOUR PIV OR Network Login	Need helps	
	"WARNING" WAR You are accessing a U.S. Geometide at other compute connected to the computer or other computers on the U.S. Government use only characterized or improve action, as well as out and criminal penalties. By call forming	a concered to this network, and all storage media is network. This information system is provided for race of this information may recard in decigitinary ig this information system you consent to the y regarding any communications or data transisting	
		INING-WARNING**	

Figure 2: Multi-Factor Authentication Login page



## 2.2 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.

## 2.3 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.

## 2.4 Select Proxy

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.

**Note:** *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 **(Selected)** column on the right.

"User Name:	christine.golladay@	dot.gov			
'First Name:	Christine	Middle	Name: Nat		Last Name: Golladay
'Agency/Mode:	DHS-CIS DHS-ICE DOJ-FEDERAL DE DOT-8TS	TENTION	\$		
	Agency options will st Address has been val	tow once your Governme Idated	nt Email		
Phone Number:	202-555-3252				
Role:	Approval/Supervisor				
	Allow Access to Access	gency Reports			
			JPERVISOR Proxy		
		5	PERVISOR Floxy		
		not selected)		(selec	cted)
	Donavon, Matt (DO	(T-OST-M1-SE)			
		Add >>>		<< Re	move
		Users who h	ave you as proxy: Mat	Donavon	
		1	MANAGER Proxy		
	(7	not selected)		(selec	cted)
	Bellet, Craig (DOT- Donavon, Matt (DO Mello, Deborah (DO Smith, Kim (DOT-O	(T-OST-M1-SE) DT-OST-M1-SE)			
		Add >>		<< Re	move
				won, Kim Smith	

To remove a proxy, select the proxy in the **(Selected)** column and click the **Remove** button.

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.



Figure 3: Update My Account Information (Proxy)

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

#### Figure 4: Selected Proxy

MANAGER 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 who have you as proxy: Matt Do	onavon, Kim Smith

**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.

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

Figure 5: Utilities Menu Options



# 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 6: 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:** The approval page can also be accessed from the Approval Section dropdown menu located on the Menu bar at the top of the Home page.

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

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. A reason for approval can be entered but is not required.
- 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.

epartment of t	ansportation					_	TRAN	ss in motion	
me Transi	Application	oproval Section -	Utilities + Admin +				1 Anges	a Rotenson	OLogos
Pendin	g Transit Ap	plication 🛛	Approving Official						
	Mode	Admin	Request Date	Туре	Name				
	Type to the	Type to Attes	Type to mer	Type to fitter	Type to filter_				
Se Vice	DOT-FAA	AST	01/07/2016	Rate Change	PARKER DUNPHY	Approve	Disapprove	K Dateto	
Ser Men	DDT-OST-M	OST-M	12/06/2015	SmarTrip and Rate Change	ANGELICA BERKENBILE	Approve	Disapprove	# Durete	Ĩ.
Si Ven	DDT-OST-M	OST-M	01/20/2016	Monthly Certification	ROBERT REED	Approve	Disapprove	× Diniti	
S Mes	DOT-TBM	BTS	01/13/2016	12345	JAMES PERRY	Approve	Disapprove	× Delete	
Si Ver	DOT-TBM	BTS	01/13/2016	12345	JOSEPH WILSON	Approve	Disapprove	× Outer	
Se Ver	TRE-HQ	TREASURY	01/19/2016	Rate Change	KAREN RODRIGUEZ	Approva	Disapprove	R Outeto	Ē.
Se vice	VA		01/07/2016	Agency Change	ANDREW FENSTERMACHER	Approva	Disapprova	R Dateto	
Se vice	VA		01/19/2016	Withdraw from the Program	SHARONDA MILLS	Approve	Disapprove	M Datets	
				< < 1 > >>					
			Note	Paging will reset your select	lore .				

Figure 7: Approval page





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.

**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									

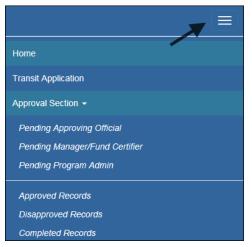


Figure 8: Approval Section Menu Options



### 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 save you want to derive the following Transit Application? Click the Continue botton below to defer the Transit Application. Click the Cancer but page. Determine the Continue to the	ton to return to the previous
Certify/Enroll (KAREN RODRIGUEZ) Status: Certification Pending (Approving Official)	
C Transit Benefit Application Worksheet	
All Transit Benefit Program Applicants are required to cently 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". Indiructions: To calculate your "Total Monthly Expense"	

Figure 9: 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	Admin	Request Date	Туре	Name	0 S	Approval Date	
	Type to filte	Type to filter	Type to filter	Type to filter	Type to filter			
New 1	DOT-OST-M	OST-M	05/19/2014	New Transit Benefit Participant	RAE SUNSHINE		05/19/2014 03:55:20:PM	X Delet
S Ver	DOT-OST-M	OST-M-01	01/13/2016	12345	HUNG_TEST CHUN		01/13/2016 01:15:53:PM	× Delet
Dr Vew	FDIC		12/22/2015	New Transit Benefit Participant	KAMERON		01/07/2016 )1:06:24 PM	× Detet

#### Figure 10: Approved Records

Pending	Transit Appl	lication 1 DisAppr	oved				
	Mode (	Admin	Request Date	Туре	Name	Reason	
	Type to fite	Type to filter	Type to filter	Type to filter	Type to filter		
Se View	DOT-OST-M	OST-M-01	07/07/2015	SmarTrip and Rate Change	MOBILE APPTEST	TEST	X Delete
Se View	ED	OUS	10/30/2015	Rate Change	DARREN CHANG	ghtctgnhtg	X Defete
Se Vice	FDIC	DC	10/29/2015	Rate Change	PAMELA	TEST Disapproval	× Derete

Figure 11: 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 completed records.

First Name:	First Name	
First Halling.	The menu	
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.	

Figure 12: Find Completed Applications page

nding	Transit Applicat	ion 658 Completed				
	Mode	0 Admin	Request Date	0 Туре	Name	÷.
	Type to filter	Type to titler	Type to filter	Type to filter	Type to filter	
View	DOD-NCR	A-NGB	12/30/2015	Agency Change	ANNIE AARON	
t Vere	DOT-FTA	FTA	09/03/2015	TEST CERTIFICATION	HUNG CHUN	
View	DOT-FTA	FTA	09/04/2015	Agency Change	HUNG CHUN	

Figure 13: 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.

	Robinson, Angela - 12/02/2020 12:36:28 PM E	ST		
"User Name:	daniel.lamulf@archives.gov			
*First Name:	Daniel Middle	e Name: Middle Name	"Last Name:	Lamuff
*Agency/Mode:	ARCHIVES	-		
	Agency options will show once your Governme Address has been validated	nt Email		
Phone Number:				
Role:	Approving Official Set Role to Applicant			
	Hide from Approver Lists			

Figure 14: Update My Account Information page





Agency Monthly Rep	orts						
	Q.	t of Transportation					
	Zip Format	EXE Format					
	ARCHIVES Monthly Report - Jan 2021	ARCHIVES Monthly Report - Jan 2021					

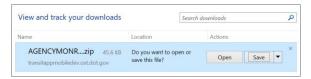


Figure 17: Open/Save Dialog Message

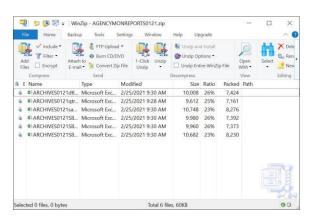


Figure 18: Zip File



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

×

Figure 19: Zip File Password

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

hourd is	Part					Optim					100-0			
			Algered	N Norder		Abin								
	fi Feb-25	-2021												
.A.		5.	p		F	G H		0.11	1	ĸ	5	M	N	
				Feb-25-2021										
	Fare Media Disbi	ursed During Jan	nuary, 2021											
inistration	Number Issued	Amount Issued	YTD Num Issued	YTD Ant Issued										
VCI	1	\$0.00	0	90.00										
JAIET	8	\$0.00	0	93.00										
		80.00		90.00										
	3		0											
ENDO: JAURE														
		86.00	0											
	A Tra	A B Transil Bendits Sur Fare Welds Obb Ca Number Issued Ca Number Issued C	A B C  Transit Bendits Summary Report by  ArChivit B Fare Media Dictored Chang Jan Fare Media Di	A B C DUST	A         B         C         B         L <thl< th=""> <thl< th=""> <thl< th=""> <thl< th=""></thl<></thl<></thl<></thl<>	A         B         C         B         L         C	A         E         B         A         B         C         B         A         B         C         B         B         C	A         B         C         B         L         C         B	A         B         C         B         L         2         C         N           Transit Branch Rummy Rupper Mark Antibiation Actives         Actives         Actives	A         B         C         B         B         C         B         B         C         C         B         C	A         B         C         B         B         C         B         B         C         C         B         C	A         B         C         B         C         B         C         B         C         C         B         C         C         B         C	A         B         C         B         C         B         C         C         B         C	A         B         E         I         C         B         C         C         B         C         C         B         C         C         N         N           Tassels Besons property Administration ACC (VPS Fain Med Colorado Change Journey, 2017           Tassels Colorado Change Journey, 2017           Tasse

Figure 20: Agency Report File

