

## **United States Department of Transportation**

# TRANSIT BENEFIT PROGRAM APPLICANT GUIDE

Submitted by

#### TRANServe

A division of the

#### Office of the Secretary of Transportation

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

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#### TABLE OF CONTENTS

1.	OVE	RVIEW	1-1
	1.1	Background	1-1
	1.2	Purpose	1-1
	1.3	Document Organization	1-1
	1.4	Point of Contacts	1-1
2.	ACCI	ESSING THE TRANSIT BENEFIT APPLICATION	2-1
	2.1	Login and Registration	2-1
	2.2	Change Password	2-3
	2.3	Password Recovery	2-4
	2.4	My Account	2-5
	2.5	Session Time Out	2-5
	2.6	Exit	2-5
3.	OVE	RVIEW OF THE PTB PUBLIC WEBSITE HOME PAGE	3–1
	3.1	Transit Benefit Application	
	3.1.1	Certify/Enroll/Change	
	3.1.2	Monthly Certification	
	3.1.3	SmarTrip® Change	
	3.1.4	Withdraw from the Program	
	3.1.5	Request Information	
	3.1.6	Disapproved Applications	
AI	PPENDI	X A: SMARTRIP CARD INSTRUCTIONS	A–1



## **Table of Figures**

Figure 1: Transit Application Login page	2-1
Figure 2: Register Account Information page	2-1
Figure 3: Completed Registration page	2-2
Figure 4: Registration Confirmation	2-2
Figure 5: Login page	2-2
Figure 6: Multi-Factor Authentication Login page	2-3
Figure 7: Change Password page	2-3
Figure 8: Change Password Confirmation	2-3
Figure 9: Utilities Menu Options	
Figure 10: Forgot Password page	2-4
Figure 11: Show Hint	2-4
Figure 12: Update My Account page	2-5
Figure 13: Update My Account Confirmation	2-5
Figure 14: Utilities Menu Options	2-5
Figure 15: PTB Public Website Home page	3–1
Figure 16: Additional Menu Options	
Figure 17: Select an Action to Continue page	3–2
Figure 18: Warning page	2 2
Figure 19: Transit Benefit Application Worksheet	
Figure 20: Commuting Distance	
Figure 21: Bus Method	
Figure 22: Other Bus Method	3-4
Figure 23: Rail Method	3–4
Figure 24: Other Method	3–4
Figure 25: Vanpool Method	3 /
Figure 26: Sample Agency Work Schedule Policies	3–4
Figure 27: Method of Transportation Table	
Figure 28: Approving Official	3–6
Figure 29: Manager/Fund Certifier	3–6
Figure 30: Point of Contact	3–6
Figure 31: Completed Transit Benefit Application	3–7
Figure 32: Smart Benefits Program page	3–7
Figure 33: Transit Benefit Program Confirmation	
Figure 34: Warning page	
Figure 35: Transit Benefit Program Application for Monthly Certification	39
Figure 36: Monthly Certification Confirmation	
Figure 37: SmarTrip® Change page	3–10



Figure 38: SmarTrip® Confirmation	3–10
Figure 39: Withdraw from the Program page	3–10
Figure 40: Approving Official (1 <sup>st</sup> Approver)	3–11
Figure 41: Manager Fund/Certifier (2 <sup>nd</sup> Approver)	3–11
Figure 42: Withdraw Confirmation	3–11
Figure 43: Request Information page	3–12
Figure 44: Point of Contact	3–12
Figure 45: Request Information Confirmation	3–12
Figure 46: Select An Action To Continue page	3–12
Figure 47: Disapproved Transit Benefit Application Worksheet	3–13
Figure 48: Update My Account Information page	4-1
Figure 49: Agency Report Password Confirmation page	4-1
Figure 50: Agency Reports page	4_1
Figure 51: Open/Save Dialog Message	4_1
Figure 52: Zip File	4_1
Figure 53: Zip File Password	4-2
Figure 54: Agency Report File	4_2



#### 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
- Underline Italic in blue Indicates a link within the system •
  - Title Case plus page
- Italic text

Indicates a name of a page in the application Indicates a note on a page in the application

#### 1.4 **Points of Contact**

Any Transit Benefits questions can be routed to BLS' Commuter Benefits Team either via email (<u>METRO@bls.gov</u>) or via phone (202-691-6007).



## 2. ACCESSING THE TRANSIT BENEFIT APPLICATION

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

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

### 2.1 Login and Registration

Use the following steps to access the application:

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

Returning applicants can enter the URL: <u>https://transitapp.ost.dot.gov/index.cfm?m</u> <u>ethod=passport.showLogin</u> to display the Transit Application Login page.

Department of Transportation		TRANSERVE
* indicates required field.		
Login		
'User Name:	Government Emeil Address	
	Continue to Login	
	Net registered yet? Register	
	**WARNING**WARNING****WARNING**	
	You are accessing a U.S. Sowment in therefulls explain, which leaded the surplus of the annulation relation to which it is consolidal of advantagement of the list instance, and a discognization corrected to the consolidat of advantagement of the strategement of the instance, and a discognization of the strategiest and the surplus of the strategiest and the instance residence approach of the constraints and the strategiest on instance. The instance may and an independent action, as well as cell and strategiest provide instrations explain and indepleting action, as well as cell and strategiest provides in the instance residence provides strategiest and the strategiest and the strategiest and the strategiest and the strategiest and the strategiest action and the strategiest and the strategiest and the strategiest and the strategiest action and the strategiest and the strategiest and the strategiest and the strategiest action and the strategiest and the strategiest and the strategiest and the strategiest action and the strategiest and the strategiest and the strategiest action and the strategiest and the strategiest and the strategiest action and the strategiest action and the strategiest and the strategiest action and the strategiest action and the strategiest action and the strategiest action and the strategiest action and the strategiest action actio	
	<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"	
		Thursday, Ma

Figure 1: Transit Application Login 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/Mode dropdown list.

'User Name:	Government Email Address	
'First Name:	First Name	
Middle Name:	Middle Name	
'Last Name:	Last Name	
"Agency/Mode:	VA	~
Phone Number:	Agency options will show once your Government Email Address has been validated	

Figure 2: Register Account Information page



5. Click the **Register** button.

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

Figure 3: Completed Registration page

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

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

Figure 4: Registration Confirmation

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

- 1. Click the **OK** button. The Login page is redisplayed.
- 2. Enter the username in the User Name textbox.
- 3. Click the **Continue to Login** button to display the multi-factor authentication login page.

O U.S. Department of Transportation		
		-OLog
" indicates required field.		
Login		
'User Name:	Government Email Address	
	Continue to Login . Not registere	
	**WARNING**WARNING****WARNING**	
	You are accossing a U.S. Boornmost into motion sealant, minch induces the computer, the annuality induces or anticle is constead, all other compates contracted to the insteace, and a large-mella contracted to this constead, all other constants or this numbers. This information are provided the 1.5 D constraints and plause to their compares and this function may small all inductives and a scale scale and scales and provide scales. By using the information system is the inductives patients of the scale scale and scales and percentages. By using the information system scales constants to the blocking:	
	<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"	

Figure 5: Login page



**Note:** 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 6: Multi-Factor Authentication 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.

"Current Password:	Current peseword	
*Create New Password:	New password	
*Confirm New Password:	Confirm New password	
*Create a Hint:	Hist	
	A hint is a meaningful personal association to help you remember your password.	
	Password must be at least 12 characters long No password character may be repeated more than 1 time(e) in sequence Password must contain characters from at least 4 of the following categories.	
	Uppercase characters (A through Z)     Lowercase characters (a through z)     Base 10 digits (0 through 9)     Non-alphateric characters (for example, 1, 5, %)	
	Password will expire 60 days after being set Passwords cannot be reused within the last 24 changes.	

Figure 7: 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.

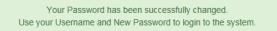


Figure 8: Change Password Confirmation



**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 9: Utilities Menu Options

### 2.3 Password Recovery

Use the following steps to recover your password:

- From the Login page, click the <u>Forgot</u> <u>Password?</u> link. The Forgot Password page displays.
- 2. 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.
- 3. The Send It By Email section allows the user to retrieve a temporary password through email. The password will be sent to the email address entered when the account was created. Enter your username and click the **Submit** button.

Note: \* indicates required field.

Forgot Password		
Show Hint		
'User Name:	Government Email Address Show Hint	
Send It by Email		
"User Name:	Overmment Einst Address A temporary password with be sent to your E-Adat Account.	
	Return to Logi	Pa

Figure 10: Forgot Password page

	Your hint is displayed below. Please Login.
' indicates required field.	
Forgot Password	1
Login	
"User Name:	kimberly į gravestost@va gov
*Password:	Enter password
	Hint: Sunday/load2
	Log In

Figure 11: Show Hint

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



## 2.4 My Account

The My Account page allows the user to update personal information and request a temporary password.

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.

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.

Note: Click the Send Temporary Password button to change your password. This request can only be made 3 times in a 24-hour period. Follow the instructions in Section 2.2 Change Password to change the password.

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

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



Figure 12: Update My Account page

User william.lett-test@state.gov has been Updated

Figure 13: Update My Account Confirmation

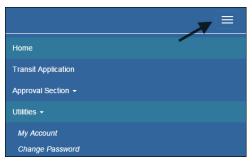


Figure 14: Utilities Menu Options

# 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 <u>home</u> 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.



Figure 15: 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.

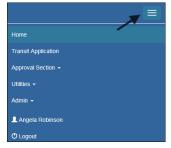


Figure 16: Additional Menu Options



## 3.1 Transit Benefit Application

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

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

**Note:** *The Certify/Enroll/Change radio button* 

is selected by default.

Employer: Department of \	/A.
Certify/Enroll/Change	0
🔿 SmarTrip Change Q	
<ul> <li>Withdraw from the Pro</li> </ul>	ogram 🛛
<ul> <li>Request Information (</li> </ul>	0

Figure 17: Select an Action to Continue page

### 3.1.1 Certify/Enroll/Change

The Certify/Enroll/Change 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 **Continue** button, the Warning page is displayed.
- 2. 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.

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

**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.



	WARNING !
xn	certification concerns a matter within the jurisdiction of an agency of the United States. Making a taske, ficilitous, or faudulent certification may constitute criminal violation shadle under Title 11, United States Code, Bection 1001, by improvement up to the years and thes up to 310.000 for each offense, and/or agency disciplinary actions up to a origi distribution.
	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 banefit, will use it for my daily commute to and from work by public transit or anpool, 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 sermonth 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 vork due to actiones, excelsion or any other reason, on official travel, or ruse a private vehicle for commuting. I will claim less and adjust to examine from the 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.
	LAgree I Do Not Agree

Figure 18: Warning page

G Transit Benefit Application Worksh	oot .	
All Transit Benefit Program Applicants are r	squired to certify the "Total Monthly Expense" of their Home to Work Mass Transit Commute	
Parking fees are not eligible for the trans	it benefit and must not be included in "Total Monthly Expense".	
nstructions: To calculate your "Total Month	ly Expense"	
<ol> <li>Name of Company for your me</li> <li>Daily or Monthly Expense</li> <li>Number of days you routinely</li> </ol>	e the price of the pass by 2, and enter the information in the Monthly Expense column.	
Reason for Certification:		w.
Civilian/Military: 0	Civilian	-
Work Status: 0	Full Time	*
C Transit Benefit Transportation Met	ods	
C manal benefit manaponation men		
	olicy for specific guidance on the Days per Month entry.	
	olicy for specific guidance on the Days per Month entry.	
Aways follow your Agency work schedule p Defined work schedule examples: • If you work a Basic schedule of 8-hou • If you work a Piex Schedule of 0-bou • If you work a Compressed schedule ;	slicy for specific guidance on the Days per Month entry. In per day, the average amount of 20 Days can be entered into the Days per Month column to the day, the average amount of 16 Days can be entered into the Days per Month column of Shourd tays, the average amount of 16 Days can be entered into the Days per Month column the fine mundred of they are dailed common bothm work.	n

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

**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.

G Transit Benefit Program Applicatio	'n				
"identifier: O					
Name:	LETT-TEST	WILLIAM		TAVIS	
	(Last)	(First)		(Middle)	
Email Address:	william.lett-test@state.gov		"Work Phone: O	703-555-1248	
Common Identifier: 0					
Department of State					
"Select Your Agency: O	DTATE	~	Region: O		
'Admin: 0	1		9		
	Populates from Select Your Age	socy			
	Please select Admin				
Accounting Code: 0			Select		
	Click the Select button to selec	Accounting Code			
Routing Symbol: 9			Select		
	Click the Select button to selec	t Routing Symbol	_		
Location/Building: 9	Click the Select button to selec	t Location/Building	Select		
		ly Transit commuting costs ar		5	
	This field is automatically calcu		592.		
Work Information					
"Work Address: O	Wark Address				
"Work Zip:	Work Zip				
"Work City:	Wark City	"Work State:	~		
Residence Information					
"Address: O	Annen				
	Address 2				
'Zep:	Zų				
'City:	City	"State:	~		
Approver Information					
"Approving Official: 0		elect			
	Click the Select button to select Approving Official				
		_			
"Point of Contact: 0	Click the Select button to select	elect	Manager Phone: 0		
	Click the Select button to select Contact	Come of			
"SmarTrip Card Number: 0					
Comment for Agency Approvers: 0					
	You have 1995 characters rem				

Figure 19: Transit Benefit Application Worksheet

Is your commute greater than 2hrs? Q	Yes			~	
Is your primary address the same as your commuting address? O	No			~	
Commute Address					
"Commute Address: 0	Commute Address				
Commute Address2:	Commute Address 2				
"Commute Zip:	Commute 2/p				
"Commute City:	Commute City	"Commute State:	~		

Figure 20: Commuting Distance

#### **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.



- 6. Select your transportation method(s).
  - ♦ Bus

Bus to Work:		\$		8
	Name of Company	Daily Expense	Days per Month	Monthly Expens
Bus from Work:		5		\$
	Name of Company	Daily Expense	Days per Month	Monthly Expensi
		mount of their transit benefit each	Total Monthly Expense:	\$ 0.00

#### Figure 21: Bus Method

Other Bus	Other Bus to Work:	Name of Company	\$ Daily Expense	Days per Month	S Monthly Expense
	Other Bus from Work:	Name of Company	S Daily Expense	Days per Month	\$ Monthly Expense
	Every Transit Benefit Program Participar month to reflect the actual cost of their h		eir transit benefit each	Total Monthly Expense:	\$ 0.00

#### Figure 22: Other Bus Method

٠	Rail	Rail to Work:	Name of Company	\$ Daily Expense	Days per Month	\$ Monthly Expense
		Rail from Work:	Name of Company	S Daily Expense	Days per Month	\$ Monthly Expense
		Every Transit Benefit Program Participan month to reflect the actual cost of their h	nt is responsible to adjust the amount of t nome to work commute.	neir transit benefit each	Total Monthly Expense:	\$ 0.00
			Figure 23: F	Rail Meth	od	
•	Other Method	Other Method to Work Other Method to Work	Name of Company	S Daily Expense	Days per Month	\$ Monthly Expense
		Other Method from Work				

#### Figure 24: Other Method

\$ 0.00

•	Vanpool	Vanpool:	Name of Company	S Daily Expense	Days per Month	\$ Monthly Expense	
		Every Transit Benefit Program Participal		heir transit benefit each	Total Monthly Expense:	\$ 0.00	

Every Transit Benefit Program Participant is responsible month to reflect the actual cost of their home to work cor

#### Figure 25: Vanpool 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.



Figure 26: Sample Agency Work Schedule Policies



Transit Benefit Program Applicant Guide

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

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

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

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

- 8. Select your Region.
- 9. Select your Admin.
- 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.* 

- 11. Enter your Work Information.
- 12. Enter your Residence Information.

**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.

Name of Company	Daily Expense	Days per Month	Monthly Expense
WMATA			
Additional Info 😡			
c BPW	\$ 2.10	16	\$ 33.60
Name of Company	Daily Expense	Days per Month	Monthly Expense
WMATA			
Additional Info 😡			
	e 8FW	Additional Info	Adatonal Into

Figure 27: Method of Transportation Table

Accounting Code: 🕄		Select
	Click the Select button to select Accounting Code	
Routing Symbol: 🕑		Select
	Click the Select button to select Routing Symbol	
Location/Building: 3		Select
	Click the Select button to select Location/Building	

#### Agency Optional Display Fields



#### Office of the Secretary of Transportation

- Click the Select button to display the list for your agency's approving officials (1<sup>st</sup> Approver).
- 17. 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.

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

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

contacts.

**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.* 

Name		Email
Type to filter		
HARRY CAREY		harry.carey@treas.gov
		_
	<< < 1 >	>>

Figure 28: Approving Official

Mana	ager/Fund Certifier							×
	Name					Emai	1	
	Type to filter							
C	DARREN CHANG					darre	n.chang@ed.gov	
C	HARRY CAREY					harry	.carey@treas.gov	
		_						
		<<	<	1	>	>>		
								Close

Figure 29: Manager/Fund Certifier

Point of	Contact					×
Na	me		Region		Email	
1	Type to filter			~		
C TR	EASURY POC		DC		vikkey.owens@dot.gov	
		<< <	1 >	>>		
					Clos	se

Figure 30: Point of Contact



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

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

- 23. Enter any information that will assist your Agency Approver with processing your application in the Comment for Agency Approvers textbox. Examples: if you use one mode of transportation on some days and a second mode on the remaining days every week, or if you travel using one mode of transportation in the morning and a different mode in the evening on specific days every week.
- 24. Click the **Continue** button.

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

'Identifier: 😡			
Name:	RODRIGUEZ (Last)	KAREN (First)	L.Y7 (Mi
Email Address:	Karen.rodrigueztest@treas.gov	۰	Nork Phone: 0 20
Common Identifier: 😏	HELLOKITTY		
Department of Treasury			
"Select Your Agency: 🖯	TRE-HQ ¥		"Region: 🛛 D
*Admin: 🕥	TRE-HQ -DC		~
	Populates from Select Your Agency		

G Transit Benefit Program App

"Admin: 😜	TRE-HQ-DC 🗸	
	Populates from Select Your Agency	
Accounting Code: 9	Select Click the Select button to select Accounting Code	
	Crick the Select dutter to select Accounting Code	
Routing Symbol: 🕥	Select	
	Click the Select button to select Routing Symbol	
Location/Building: 0	Select	
	Click the Select button to select Location/Building	
	I certify that my usual monthly Transit commuting costs are: 0	\$ 200.00
	This field is automatically calculated	
Work Information		
'Work Address:	401 M ST SE	
"Work Zip:	20003	
"Work City:	WASHINGTON "Work State: DC V	
Residence Information		
"Address:	1200 NEW JERSEY AVE SE	
	Address 2	
"Zip:	20590	
0,0	200400	
"City:	WASHINGTON "State: DC V	
Approver Information		
Approver mormation		
	CAREY, HARRY Scient "Menager/Fund Certifier: 0	CAREY, HARRY Select
*Approving Official: •	CAREY, HARRY Select. Manager/Fund Cettifier: O Cilck the Select builton to select	CAREY, HARRY Select Click the Select button to select
	CAREY, HARRY Select Manager/Fund Certifier:  Carety, HARRY Certifier:  Carety, HARRY Certifier:  Approving Official	CAREY, HARRY Select Click the Select button to select Manage//Fund Certifier
*Approving Official: O	Citck the Select builton to select Approving Official	Click the Select button to select
	Cick the Select Buffon to select Approving Official TREASURY POC Select. Manager Phone: O	Click the Select button to select
*Approving Official: O	Citck the Select builton to select Approving Official	Click the Select button to select
*Approving Official: O	Click the Select Jutton to select Approving Official TREASURY PDC Select Manager Phone: Q Click the Select Jutton to select Point of	Click the Select button to select
*Approving Official: •	Click the Select Butter to select Approving Official TREAMARY PROC Period Click the Select Butter to select Point of Control	Click the Select button to select
*Approving Official: O	Click the Select Jutton to select Approving Official TREASURY PDC Select Manager Phone: Q Click the Select Jutton to select Point of	Click the Select button to select
*Approving Official: •	Click the Select Butter to select Approving Official TREAMARY PROC Period Click the Select Butter to select Point of Control	Click the Select button to select
*Approving Official: • *Point of Confact: • *SmarfTrip Card Number: •	Cick the Select fultion to select Agreeming Official TREAURY POC Select Manager Please: O Costa de Select button to select Point of Costad	Click the Select button to select
*Approving Official: • *Point of Confact: • *SmarfTrip Card Number: •	Cick the Select butter to select Agreeming Official TREAURY POC Select Contract NA. HELP ME HELP YOU	Click the Select button to select

#### Figure 31: Completed Transit Benefit Application



Figure 32: Smart Benefits Program page

- 25. 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.
- 26. Click the **NO Thank You** button if you do not want to join the SmartBenefits® program.





Transit Benefit Program Applicant Guide

27. 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 33: Transit Benefit Program Confirmation



### 3.1.2 Annual Recertification

Participants are required to recertify their transit benefits needs once per 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.



Suspended Transit Benefit Account

Your Current Application Status: Change Request Completed (01/29/2021) Your current transit benefit certification will expire on Feb 28, 2021. Failure to recertify by the expiration date will result in the suspension of your transit benefits.

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

Use the following steps to submit an Annual Recertification application:

- 1. From the Select an Action to Continue page; select the **Annual Recertification** 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 Annual Recertification Program to submit an annual recertification application.

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



Figure 34: Warning page



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

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

**Note:** If the address entered when the application was initially submitted is invalid; the annual recertification 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 annual recertification 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.

#### Office of the Secretary of Transportation

Monthly Certification				
C Transit Benefit Application Worksh	eet			
All Transit Benefit Program Applicants are n	equired to certify the "Total Monthly E	Expense" of their Home to Work Ma	iss Transit Commute	
Parking fees are not eligible for the trans	it benefit and must not be included	in "Total Monthly Expense".		
instructions. To calculate your "Total Month	nly Expense"			
a. Select your transportation method(s) b. Enter the following information in the				
i. Name of Company for your me	"To Work" and "From Work" row(s) of thod of transportation (Metro, BART, 5	each transportation method: Subway)		
<ol> <li>Daily or Monthly Expense</li> <li>Number of days you routinely v</li> </ol>	vork in a month			
iii. Number of days you routinely v c. If you purchase a Monthly pass, divid d. The Total Monthly Expense value aut	e the price of the pass by 2, and enter omatically populates	the information in the Monthly Expe	nse column.	
	Monthly Cartification			
Civilian Military:	CIVILIAN			
Work Status:	FULL TIME			
C Transit Benefit Transportation Met				
You work 8-hour days, enter 20 in the Day I you work 8-hour days, enter 18 in the Day I you work 10-hour days, enter 18 in the Day I you telecommute or work part time, enter		sule tofform work.		
	"Belect yo Bus Other Bus	er transportation methods: Roll Officer Method Vanjoor		
Other Bus to Work:	CETW	\$ 3.10	20	\$ 62.00
	Name of Company	\$ 3.10 Daily Expense	20 Days per Month	Monthly Expense
Other Bus from Work:	OBFW	\$ 3.10	20	\$ 62.00
	Name of Company	Dally Expense	20 Days per Month	Monthly Expense
Every Transit Benefit Program Participar month to reflect the actual cost of their h	t is responsible to adjust the amou ome to work commute.	nt of their transit benefit each	Total Monthly Expense:	\$ 124.00
C Transit Benefit Program Application	1			
Smart Benefits Program:				
identifier:	1			
Name:	SHANEFELTER	CHRIS (Finit)		
	chris.shanefelter@treas.gov			
Work Phone:	(202) 555-6989			
	TEST		Work Zip Code: 20590	
Department of Treasury				
Agency/Mode:	TREHQ		Region: DC	
Admin:	TRE-HQ -DC			
	I certify that my usual monthly Tran This field is automatically calculated	sit commuting costs are: O	\$ 124	00
Work Information				
	36 WORK PLACE			
Work City:	WORK	Work State: DC	Work Zip:	44444
Residence Information				
Address:	52 HOME PLACE			
	HOME	State: DC	Zip:	55555
Approver Information				
Approving Official:	CAREY, HARRY	Manag	er/Fund Certifier: DARREN CH	ANG
Point of Contact	TREASURY POC		Manager Phone:	
SmartTrip Card Number:	NA			
Comment for Agency Approvers: @				
	You have 1996 characters remaining	9		
	Founder 1996 Characters remaining			
	Toe have 1999 chalacters remaining			Continue Cance
PRIVACY ACT STATEMENT:	Foo nave 1966 Chalacters (English			Continue Cance

Figure 35: Transit Benefit Program Application for Annual Recertification

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

Thank you, your Monthly Certification application has been submitted.

Figure 36: Annual Recertification Confirmation



### 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.

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.

Seneral Information				
"Identifier:	****			
Name:	QUINTEROTEST	BIFF		
	(Last)	(First)		
Email Address:	biff.quinterotest@fdic.gov			
Agency:	Federal Deposit Insurance Cor	poration (FDIC)		
marTrip Information				
SmarTrip Card Number: Q				
			Submit	Cancel

Figure 37: SmarTrip® Change page

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

Figure 38: 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.

Identifier:			
Name:	MILLS	SHARONDA	
	(Last)	(First)	
Email Address:	Sharonda Mills@va.gov		
Agency/Mode:	Department of V.A. (VA)		
*12348: 🛛	(202) 555-4441		
"Withdrawal Date:		Ħ	
	Click the Calendar to sele	t a Withdrawal Date	
*Approving Official: 9		Select.	
	Click the Select button to :	elect Approving Official	
*Manager/Fund Certifier: 0		Select_	
	Click the Select button to a	elect Manager/Fund Certifier	
Comment for Agency Approvers: 9			
	You have 1995 characters	remaining	
			Withdraw Cancel

Figure 39: Withdraw from the Program page



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

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

proving Official			
Name		Email	
Type to filter			
KIM LYONS		kim.lyonstest@va.gov	
	<< < 1 >	>>	
			Clo

Figure 40: Approving Official (1<sup>st</sup> Approver)

Mana	ager/Fund Certifier							×
	Name					Email		
	Type to filter							
C	GLEN HARPERTEST					glen.h	arpertest@va.gov	
C	JESSICA MARTIN					jessica	a.martins@va.gov	
		<<	<	1	>	>>		
								Close

Figure 41: Manager Fund/Certifier (2<sup>nd</sup> Approver)

- 8. Enter any information that will assist your Agency Approver with processing your application in the Comment for Agency Approvers textbox.
- 9. Click the **Withdraw** button. The request is sent to TRANServe for processing and a confirmation message is displayed at the top of the page.

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

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

Figure 42: Withdraw Confirmation



### 3.1.5 Request Information

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

- From the Select an Action to Continue page; click the Request Information radio button.
- 2. Click the **Continue** button. The Request Information page is displayed.
- 3. Click the **Select** button to display the list for your agency's point of contacts.
- 4. Select a POC from the list.
- 5. Enter the question or concern in the Question textbox and click the **Send Request** button.

**Note:** *The POC selected on a submitted application will pre-populate in the Point of Contact textbox.* 

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

Name:	Graves	Kimberly	Jessica	
	(Last)	(First)	(Middle)	
Email Address:	kimberly j.gravestest@dot.gov			
Agency:	Department of Transportation			
Point of Contact: 😌		Select		
	Click the Select button to select Point	of Contact		
'Question:				
			Send Request	Canc

Figure 43: Request Information page

Point	of Contact			
	Name	Region	Email	
C	TREASURY POC	DC	vikkey.owens@dot.gov	
				Close

Figure 44: Point of Contact

Thank you, your request has been sent.

Figure 45: Request Information Confirmation

### 3.1.6 Disapproved Applications

Applications that have been Disapproved are sent back to the applicant. If corrections are needed the applicant can make those corrections and resubmit the application.

- From the Home page, click the **Transit Benefit Application** button. The Select an Action to Continue page displays. The reason the application was disapproved is displayed at the top of the page.
- 2. Select the **Update Disapproved** Application Certification radio button.

	Reason: TEST Disapprove	
Select an Action t	o Continue	
	Employer: Department of State	
	Update Disapproved Certification	
	O Request Information O	

Figure 46: Select An Action To Continue page



Transit Benefit Program Applicant Guide

- The reason the application was disapproved is displayed at the top of the Transit Benefit Application Worksheet and the Transit Benefit Program Application.
- The applicant's information entered when the application was submitted is displayed in the fields. Make the noted corrections and resubmit the application by clicking the Continue button.
- Click the **Delete Application** and **Start Over** button to delete the existing application. Doing this will require the applicant to complete and resubmit a new application.

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

#### Office of the Secretary of Transportation

		ation and Start Over		
	Disapproved Rea	eson: TEST Disapprove		
indcales required field,				
Certify/Enroll Status: Cer	tification Disapproved (11/15/2)	022)		
G Transit Benefit Application Worksh	set			
All Transit Benefit Program Applicants are	required to certify the "Total Monthly Expe	ense" of their <u>Home to Work</u>	Mass Transit Com	nute
Parking fees are not eligible for the trans- instructions. To calculate your "Total Mont		'Total Monthly Expense''.		
a Salart upor transportation methodia				
<ol> <li>Name of Company for your m</li> <li>Daily or Monthly Expense</li> </ol>	"To Work" and "From Work" row(s) of each ethod of transportation (Metro, BART, Sub- work in a month de the price of the pass by 2, and enter the nomatically populates	wzy)	ixpense column.	
"Reason for Certification:	New Transt Benefit Participant			v
Civilian/Military: 0	CIVILIAN			4
Work Status: 0	PullTime			-
G Transit Benefit Transportation Met	hods			
Aways tollow your Agency work schedule ; Defined work schedule asamples:	policy for specific guidance on the Days pe	e Month entry.		
Hyou work a Basic schedule of 8-ho     Hyou work a Flex Schedule of 9-ho	urs per day, the average amount of 20 Day m per day, the average amount of 16 Days of 10-hour days, the average amount of 16	rs can be entered into the Da s can be entered into the Da	sys per Month colur vs per Month colur	m 0
If you work a Compressed schedule     If you telecommute or work part time	, enter the number of days you actually co	mmute todrom work.	ne Days per Month	column
		neportation methods:		
	Bus Other Bus Rai	i Other Method Varg	hood	
Vargoot:	Arrive Alive LLC Name of Company	5 10.00 Daily Expense	18 Days per Mi	\$ 160.00 Monthly Expense
	Harde of Company	Unity Expense	Cashi bei Mi	mm Monthly Expense
Every Transit Benefit Program Participa month to reflect the actual cost of their	nt is responsible to adjust the amount of here to work commute.	f their transit benefit each	Total Nor	thy Expense: \$ 160.00
C Transit Benefit Program Applicatio	n			
	Disapproved Rear	sen: TEST Disapprove		
"sdweitifhae: O				
Name	LETT-TEST	WILLIAM		TAVIS
Ernell Address	(Lost) william.lett-teot@state.gov	(First)	Work Phone: 0	(Midde)
Common Identifier: 9				
Department of State				
"Select Your Agency: O	STATE ~		"Region: O	DC
'Admin: O	A		ω.	
	Populates from Select Your Agency			
Accounting Code: 0	Click the Galect button to select Account	trig Code	Select	
Routing Symbol: O			Select	
	Click the Salect button to select Routing	Symbol	-	
Location Building: 0	Click the Select suffor to select Location	n®ulāng	Select	
	I certify that my usual monthly Trensit This field is automatically calculated	t commuting costs are: 0		\$ 160.00
Work Information				
Wark Address: 0	1200 NEW JERSEY AVE			
"Work Zu:	30568			
Work City:	WADHINGTON	Work State: DC	3	
Residence Information				
	ABD1 ABTH AVE			
	Address 2			
20:	20761			
· city:	HUNTERATE	"Blate: UD	*	
Approver Information				
	VERMA, RARY K Select			
	Click the Detect button to select Approving Official			
"Point of Contact: Q	ORIVES SARA Selection		Manager Phone: O	
	Click the Select button to select Point of Contact			
"limarTrip Card Number: 0	265			
Comment for Agency Approvers: 9				
	You have 1995 characters remaining			
	You have 1995 characters remaining			
	You have 1995 characters remaining			

Figure 47: Disapproved Transit Benefit Application Worksheet





# 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.
  - 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 online: http://www.wmata.com/fares/purchase/
- You can also purchase a SmarTrip card on an Apple or Android smartphone through WMATA's phone applications. Please note that these cards will be digitized to your smartphone's wallet application.

**Note:** An online order will require you to provide a shipping address which must match the billing address online 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:

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

TIP 2: If your SmarTrip® serial number is nine (9) digits, you need a new (20) digit card.

Card Type #4: 🔘	return to: WMATA, 600 Fifth Street, N.W. . 20001 by and SmartBenefits' logos
	le <sup>r</sup> and Smartbenetits' logos Adviewka marks of WMXIX. GD1137 0167 0693 4564 7992 9601

