

United States Department of Transportation

TRANSIT BENEFIT PROGRAM APPLICANT GUIDE

Submitted by

TRANServe

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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
- 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 Points 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 Participant Page for agency contact information:				
https://www.transportation.gov/transerve/participants/equal-employment-opportunity-commission-eeoc				



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. Use the Search Agency-Specific Participant Information enter agency and click on Go.
- 4. If your Agency requires you to complete the Transit Benefit Integrity Awareness Training; found on the agency participant page. (Follow the instructions to complete the Transit Benefit Integrity Awareness Training).
- 5. Select *Transit Benefit Program Application System* link.

2.1 Login and Registration

Use the following steps to access the application:

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

Returning applicants can enter the URL: <u>Transit Benefit Program Application</u> <u>System</u> to display the Transit Application Login page.

Q U.S. Department of Transportation		
		•O Logi
" Indicates required field.		
Login		
'User Name:	Government Email Address	
	Continue to Login . Not reported performance	
	WARNING **WARNING ***WARNING***	
	You are accessing a U.S. Somman intervention solution, which leaded the surpluster the consultant realised to entrol the contraded all other completer contracted to its nateuts, and a disage-induce contracted to this completed, and other completer contracted to its nateuts, and a disage-induce contracted to this completed, and other completes contracted intervention regions and U.S. Downmannet as only fluctuations that intervention regions and inducipating actios, as well as cell and orannel peralises. By seng the information regions per list inducipating contracted and activity and peralises. By seng the information regions per list the fluctuation.	
	 You have no reasonable expectation of privacy regarding any communications or data transiting this subsock or stored in this information system. 	
	"WARNING" WARNING"	
esolidy Effect EOK Electrolical Oxidy No Ecolog	DD Hiller [Pyrenholisiy] (Holy High Boy Boy Boltonics] Joseph J. Market States, Weither ye	Thursday, May 19, 2

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 Agency options will show once your Government Email Address has been validated	~
Phone Number:	лурску орилна ини акии чико учин оононниен. Слан ликиеза наз цесн наниател	

Figure 2: Register Account Information page



5. Click the **Register** button.

'User Name:	kimberly j gravestest@va.gov	
"First Name:	Kimberly	
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.

(U.S. Department of Transportation			
			OLogin
" indicates required field.			
Login			
'User Name:	Government Email Address		
	Continue to Login		
	Nit registered yes? Register		
	You are accessing at U.S. Government information system, since tracking the computer, the somalitize measure or united if is commented, all other computers commented to the measure, and all information of the computer of the computer of the computer of the computer of the computer and the difference on equation of the computer of the computer of the information equation of the computer patient of the computer of the computer of the computer of the computer patient of the computer of the computer patient of the computer of the computer of the computer patient of the computer of the computer patient of the computer p	ĺ	
	 You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system. 		
	"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

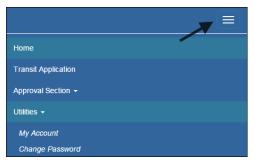


Figure 14: Utilities Menu Options

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.

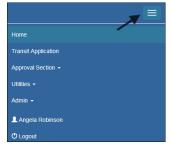


Figure 16: Additional Menu Options



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.

Select an Action t	o Continue	
	Employer: Department of VA.	
	Certify/Enroll/Change	
	SmarTrip Change 😡	
	Withdraw from the Program O	
	Request Information	
	Continu	

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
 - Change
 - 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 !
	the jurisdiction of an agency of the United States, Making a faile, fictilious, or hauddent cetification may constitute criminal violation de, Section 1001, by impresonment up to five years and fires up to \$10.000 for each offense, and/or agency disciplinary actions up to an
- I certify that I am employed by	the U.S. Federal Government
- I certify that I am not named or	n a federally subsidized parking permit with any other federal agency.
- I certify that I am eligible for a vanpool, and will not give, sell, o	public transportation fare benefit, will use it for my daily commute to and from work by public transit or r transfer it to anyone else.
per month on public transit exce	h. I vill not use the Government-provided transit benefit in excess of the statutory limit. If my commuting costs ad the month statutory limit, then I vill supplement those additional costs with my own funds rather than use penefit designated for use in a future month.
out of work due to sickness, vac	transit benefit in excess of my actual monthly commuting expanse. If at anytime during a given month I am ation or any other neason, on official travel, or use a private vehicle for commuting, I will claim less and adjust the following month if appropriate.
- I certify that my parking fees a	re not included in the computation of the daily, weekly or monthly commuting costs for my transit benefit.
	1 Agree 1 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"	
 Name of Company for your me Daily or Monthly Expense Number of days you routinely 	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 9-hou • 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

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Note: * indicates required field.

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

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.

Office of the Secretary of Transportation

G Transit Benefit Program Applicatio	n				
"identifier: O					
Name:	LETT-TEST (Last)	WILLIAM (First)		TAVIS (Middle)	
Email Address:	william.left-test@state.gov		"Work Phone: 0	703-555-1248	
Common Identifier: 0					
Department of State					
"Select Your Agency: O	BTATE		"Region: O		
'Admin: O	[~		
	Populates from Select Your Agency Please select Admin				
Accounting Code: 9	Click the Select button to select Account	ting Code	Select		
Routing Symbol: 0	Click the Select button to select Routing		Select		
Location/Building: O	Click the Select button to select Location		Select		
	I certify that my usual monthly Transi This field is automatically calculated			5	
Work Information					
"Work Address: 0	Work Address				
"Work Zap:	Work Zip				
"Work City:	Wark Oly	'Work State:	×		
Residence Information					
'Address: O	Astron				
'Zıp:	Address 2 Zap				
*City:	City	"State:	~		
Approver Information					
*Approving Official: 9	Click the Select button to select Approving Official				
"Point of Contact: 0	Select	1	Manager Phone: 0		
	Click the Select button to select Point of Contact				
"SmarTrip Card Number: Q					
Comment for Agency Approvers: 0					
	You have 1995 characters remaining		Å		

Figure 19: 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.



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

Figure 20: Commuting Distance

- 6. Select your transportation method(s).
 - Bus ٠

Bus to Work:		5		8
	Name of Company	Daily Expense	Days per Month	Monthly Expens
Bus from Work:		8		\$
	Name of Company	Daily Expense	Days per Month	Monthly Expense
From Terroris Barriels Barriels	of is remonsible to adjust the	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	5 Monthly Expense
	Other Bus from Work	Name of Company	\$ Daily Expense	Days per Month	S Monthly Expense
	Every Transit Benefit Program Partici	ant is responsible to adjust the amount	of their transit benefit each	Total Monthly Expense	e: \$ 0.00

Every Transit Benefit Program month to reflect the actual cos

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	\$ Daily Expense	Days per Month	\$ Monthly Expense
		Every Transit Benefit Program Participa month to reflect the actual cost of their l	nt is responsible to adjust the amount of t home to work commute.	heir transit benefit each	Total Monthly Expense:	\$ 0.00
			Figure 23: H	Rail Meth	od	
٠	Other Method	Other Method to Work Other Method to Work	Name of Company	\$ Daily Expense		\$ Ionthly Expense
		Others Medhard Base West				

Figure 24: Other Method

\$ 0.00

\$

Total Monthly Expense: \$ 0.00

anpool	Vanpool:	Name of Company	S Daily Expense	Days per Month	\$ Monthly Expense
	Every Transit Benefit Program Particip month to reflect the actual cost of their		ount of their transit benefit each	Total Monthly Expense:	\$ 0.00

ry Transit Benefit Program Participant is responsion th to reflect the actual cost of their home to work o

Figure 25: Vanpool Method

ant is responsible to adjust the amount of their transit benefit each

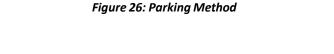
\$

Parking

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.



Alwa	s follow your Agency work schedule policy for specific guidance on the Days per Month entry.
Defin	ed 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 19 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 leckommute or work part time, enter the number of days you actually commute bitform work.

Figure 27: Sample Agency Work Schedule Policies



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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.

- 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.
- 9. Enter the Identifier. This field is used to uniquely identify the applicant.

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

- 10. Select your Region.
- 11. Select your Admin.

Note: *The optional field labels can be renamed or hidden by the Agency TBM.*

- 12. Enter your Work Information.
- 13. 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.

Bus to Work:	BTW	\$ 2.10	16	\$ 33.60
	Name of Company	Daily Expense	Days per Month	Monthly Expense
	WMATA			
	Additional Info 😌			
Bus from Work:	BFW	\$ 2.10	16	\$ 33.60
Bus from Work:	BFW Name of Company	\$ 2.10 Daily Expense	16 Days per Month	\$ 33.60 Monthly Expense
Bus from Work:				

Office of the Secretary of Transportation

Figure 28: Method of Transportation Table

I acknowledge my commuting costs are above the current 1310.00 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.

Transit Statutory Limit Radio Buttons

Accounting Code: 😡		Select
	Click the Select button to select Accounting Code	
Routing Symbol: 🧿		Select
	Click the Select button to select Routing Symbol	
Location/Building: 😡		Select
	Click the Select button to select Location/Building	

Agency Optional Display Fields



- Click the Select button to display the list for your agency's approving officials (1st Approver).
- 17. Select your Approving Official (1st 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 (2nd Approver).
- Select your Manager/Fund Certifier (2nd Approver).

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

Note: If your agency is set-up for Single Approver – Program Admin (3rd 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	
	<< •		>>	

Figure 29: 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 30: Manager/Fund Certifier

Point	of Contact			\$
	Name		Region	Email
	Type to filter		~	
C	TREASURY POC		DC	vikkey.owens@dot.gov
		<< <	1 > >>	
				Close

Figure 31: 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. (add examples from NHO presentation).
- 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.

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.
- 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.



"Identifier: 😡				
Name:	RODRIGUEZ	KAREN		LYNN LEE
Name:	(Last)	(First)		(Middle)
Email Address:	Karen.rodrigueztest@treas.gov		"Work Phone: 📀	202-555-7764
Common Identifier: 😏	HELLOKITTY			
Department of Treasury				
*Select Your Agency: 0	TRE-HQ ¥		"Region: O	DC
'Admin: O	TRE-HQ -DC Populates from Select Your Agency		~	
Accounting Code: 9	Click the Select button to select Accountil	na Code	Select	
Dentire 6	once and detect pattern to serect Accounting	9 0000	Quin t	
Routing Symbol: 🥥	Click the Select button to select Routing 5	Symbol	Select	
Location/Building: 0			Select	
	Click the Select button to select Location	Building		
	I certify that my usual monthly Transit of This field is automatically calculated	ommuting costs	are: 😡	\$ 200.00
Work Information	This field is automatically calculated			
	401 M ST SE			
'Work Address:	401 M ST SE			
"Work Zip:	20003			
"Work City:	WASHINGTON	"Work State:	DC ¥	
Residence Information				
*Address:	1200 NEW JERSEY AVE SE			
	Address 2			
*Zip:	20590			
		"State:		
*City:	WASHINGTON	"State:	00 🗸	
Approver Information				
*Approving Official: O	CAREY, HARRY Select		"Manager/Fund Certifier: 😔	CAREY, HARRY Se
	Click the Select button to select Approving Official			Click the Select button to select Manager/Fund Certifier
*Point of Contact: 9	TREASURY POC Select Click the Select button to select Point of		Manager Phone: 😡	
	Contact			
*SmartTrip Card Number: O	NA			
Comment for Agency Approvers: 9	HELP ME HELP YOU			
	You have 1979 characters remaining			

Figure 32: Completed Transit Benefit Application



Figure 33: Smart Benefits Program page

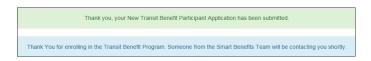


Figure 34: Transit Benefit Program Confirmation

3.1.2 Annual Recertification

Participants are required to submit a recertification 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.



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/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 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 35: 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.

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Monthly Certification								
C Transit Benefit Application Workshi	eet							
All Transit Benefit Program Applicants are n	equired to certify the "Total Monthly E	xpense" of their Home to Work M	ass Transit Commute					
Parking fees are not eligible for the trans	It benefit and must not be included in	n "Total Monthly Expense".						
instructions. To calculate your "Total Month								
a Select your transportation method(s)								
a. decr. you announcement memory b. Enter the following information in the "To Work" and "From Work" row(s) of each transportation method: I. Name of Company for your method of transportation (Metro, BART, Subway)								
 Daily or Monthly Expense Number of data your prefinates 	work in a month							
 If you purchase a Monthly pass, divid d The Total Monthly Expense value aut 	le the price of the pass by 2, and enter t tomatically populates	he information in the Monthly Exp	ense column.					
	Monthly Certification							
Civilian/Military:	CIVILIAN							
	FULL TIME							
G Transit Benefit Transportation Meth								
If you work 8-hour days, enter 20 in the Day If you work 9-hour days, enter 18 in the Day If you work 10-hour days, enter 16 in the Da If you telecommute or work part time, enter	s per Month column s per Month column sys per Month column							
If you telecommute or work part time, enter		ute tortirom work. r transportation methods.						
	Bun Other Bus		a -					
Other Bus to Work:	OBTW	\$ 3.10	20	\$ 62.00				
	Name of Company	Daily Expense	20 Days per Month	Monthly Expense				
Other Bus from Work:	OBFW	\$ 3.10	20	\$ 62.00				
	Name of Company	Daily Expense	Days per Month	Monthly Expense				
Every Transit Benefit Program Participar month to reflect the actual cost of their h	nt is responsible to adjust the amoun	t of their transit benefit each	Total Monthly Expe	nse: \$ 124.00				
C Transit Benefit Program Application	1							
Smart Benefits Program:	NO							
identifier:								
Name:	SHANEFELTER	CHRIS						
	(Last)	(First)						
Email Address:	chris.shanefelter@treas.gov							
Work Phone:	(202) 555-6989							
Common Identifier:	TEST		Work Zip Code: 20590					
Department of Treasury								
	TREHO		Region: DC					
			Negron: DC					
Admin:	TRE-HQ -DC							
	I certify that my usual monthly Trans This field is automatically calculated	iit 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							
City:	HOME	State: DC		Zip: 55555				
Approver Information	- None	Jan. 00						
	CAREY, HARRY	Mana	ger/Fund Certifier: DARRE	N CHANG				
	TREASURY POC		Manager Phone:					
SmartTrip Card Number:	NA							
Comment for Agency Approvers: @								
	You have 1996 characters remaining							
	You have 1986 characters remaining							
	Tou nave 1996 characters remaining			Continue Cance				
PRIVACY ACT STATEMENT:	You nave 1996 characters remaining			Continue. Cance				

Figure 36: 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 37: 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)		
imarTrip Information				
SmarTrip Card Number: Q				
			Submit	Cance

Figure 38: SmarTrip® Change page

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

Figure 39: 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:			
	Click the Calendar to sele	t a Withdrawal Date	
*Approving Official: 9		Select	
	Click the Select button to s	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 40: Withdraw from the Program page



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

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

Email	
kim.lyonstest@va	.gov
<< ۲ 1	Email kim.lyonstest@va

Figure 41: Approving Official (1st 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 42: Manager Fund/Certifier (2nd 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 43: 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	t of Contact		
"Question:				
			Send Request	Canc

Figure 44: Request Information page

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

Figure 45: Point of Contact

Thank you, your request has been sent.

Figure 46: 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 to	Continue	
	Employer: Department of State	
	Update Disapproved Certification	
	Request Information	

Figure 47: Select An Action To Continue page



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- 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.

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	Delete Applicat	tion and Start Over		
	Disapproved Rear	sen: TEST Disapprove		
indcates required field.				
Certify/Enroll Status: Cer	tification Disapproved (11/15/20	122)		
S Transit Benefit Application Workst				
	required to certify the "Total Monthly Expe- sit bonefit and must not be included in "		ass Transit Commute	6
Instructions: To calculate your "Total Mont				
 a. Select your transportation method(s) b. Enter the following information in the) "To Work" and "From Work" row(s) of each	transportation method.		
	ethod of transportation (Metro, BART, Subw work in a month			
	de the price of the pass by 2, and enter the tomatically populates	information in the Monthly Exp	ense column.	
	New Transt Benefit Participant			č
Civilian/Milliany: O				-
Work Status: 0				
G Transit Benefit Transportation Met	hods			
Always follow your Agency work schedule : Defined work schedule samples:	policy for specific guidance on the Days per	Month entry.		
· If you work a Basic schedule of 8-bo	urs per day, the average amount of 20 Days ins per day, the average amount of 16 Days	s can be entered into the Days can be entered into the Days	per Month column per Month column	
If you work a Compressed schedule If you telecommute or work part time	in per day, the average amount of 16 Days of 10-hour days, the average amount of 16 , enter the number of days you actually con		Days per Month colu	m
	"Select your tran	sportation methods:		
	Bus Other Bus Rail	Other Method Vargos	a l	
Vargeod:	Arrive Alive LLC	\$ 10.00	16	\$ 100.00
	Name of Company	Daily Expense	Days per Month	Monthly Expense
Every Transit Benefit Program Participa	nt is responsible to adjust the amount of	f their transit benefit each	Total Monthly	Expense: § 160.00
month to reflect the actual cost of their	home to work commute.		Claco Brit	Carton Los Designed
G Transit Benefit Program Applicatio	n			
	Disapproved Reas	en: TEST Disapprove		
Subertifier: O	1			
Nama	LETT-TEST	WELIAM		AVIS
Sume	(Lost)	(First)		Avia Midde)
Email Address!	william.iett-test@state.gov		Work Phone: O	703-555-1248
Common Identifier: 0				
Department of State "Select Your Agency: 0	STATE		Region: O	
anary see Advorts O	BIATE 0		walten o	50
'Admin: 0	A Populates from Select Your Agency		~	
			No. of Concession, Name	
Accounting Code: 0	Click the Select button to select Accounts	ing Code	Belet	
Routing Symbol: 0			Select	
	Click the Select button to select Routing	Symbol	_	
Location Building: 0	Click the Select button to select Location	Building	Select	
	I certify that my usual monthly Transit	commuting costs are: 0		\$ 160.00
Work Information	This field is automatically calculated			
Work Address: 0	1200 NEW JERSEY AVE			
Work Zu:	30568			
Work City:	No. Andrews West	Tologia Bitalar		
	WASHINGTON	Work State: DC v		
Residence Information				
'Address: 0	4301 48TH AVE			
20:	Address 2 20781			
"City:	HONTEVELE	"State: MD ~		
Approver Information				
Approving Official: 0	VEHMA, RAJV K Selectu,			
	Click the Belect button to select Approving Official			
Point of Contact: O	OROVES SARA Select	Mar	reger Phone: O	
	Click the Select button to select Point of Contact			
"SmarTrip Card Number: 0	PA .			
Comment for Agency Approvens: 0				
	You have 1995 characters remaining			
				Continue Cancel
				and the second second

Figure 48: 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.

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.

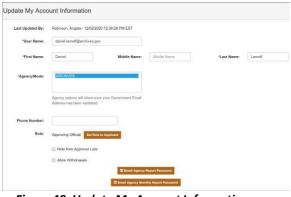


Figure 49: Update My Account Information page



Figure 50: Agency Report Password Confirmation page

0	0				
	U.S. Department of Transportation				
Zip Format	EXE Format				
ARCHIVES Monthly Report - Jan 2021	ARCHIVES Monthly Report - Jan 2021				

View and track your downloads	Search	downloads		P
Name	Location	Actions		
AGENCYMONRzip 45.6 KB	Do you want to open or save this file?	Open	Save 🔻	×

Figure 52: Open/Save Dialog Message

-	- 🖓 🚱 🤘 -	WinZip	- AGENC	MONREP	ORTS0121.zip				-		×
Fi	e Home	Backup	Tools	Settings	Window	Help	Upgrade				~ (
Ad File	es Encrypt	Attach to E-mail •	 FTP Up Burn C Converting 	D/DVD	1-Click Unzip Unzip	🥭 Unzig	o and Instr o Options o Entire Wi	•	Open With •	Select	X Del Carlor Net
	Compress		Send	Modi	P	Decompres	is lize Rati		View d Path		Editing
na t	ARCHIVES012	Ty				10.0					
4 4 4 4 4	ARCHIVES012 ARCHIVES012 ARCHIVES012 ARCHIVES012 ARCHIVES012	1qtr M 1sa M 158 M	icrosoft Ex icrosoft Ex icrosoft Ex	c 2/25/ c 2/25/ c 2/25/	/2021 9:28 AM /2021 9:30 AM /2021 9:30 AM		12 259 48 239 180 269	6 7,16 6 8,27 6 7,392	1 5 2		
-	ARCHIVES012					10,6					
Salac	ted 0 files, 0 byte	c.			Total 6 f	les. 60KB					00

Figure 53: Zip File



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

Decrypt				\times
Enter passw	ord:			
<mark>∕ H</mark> ide the	password			
	OK	Cancel	Help	

Figure 54: Zip File Password

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

1A		/ fi Feb-25	2021												
	A		5	D	E Feb-25-2021	F	G	н	1	1	K	4	м	N	
		Number issued	Arrount Issued	These at the barries	YTD Amt Issued										
	Administration	Number issued		T ID NUM Issued											
	Administration Allowics Taxa, Jave 1	Number issued	Arrount Issued	0 0	90.00 80.00										
	410-4403	Number issued	90.00	0 0 0	90.00										
	NTO-PVET TAVA JAVET	Number issued	90.00 \$0.00	0	90.00 83.00										
	NEO INTER TAVA, JANET NOR 111 GELTEST GROUNI	9 8 9	90.00 50.00 50.00	0 0	90.00 83.00 90.00										
	NOVES TAVA SHET NOR THI GELTERT CHROLINI DET MOT IK VE SHERRINI	9 8 9	90.00 50.00 50.00 50.00	0 0	90.00 80.00 90.00 80.00										

Figure 55: 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.
 - 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/

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:

Card Type #4: 🔘	return to: WMATA, 600 Fifth Street, N.W. - 20001 stel/service marks of WMATA. GD1137 stel/service marks of WMATA. GD1137
	serial number

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.



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