



**United States Department of Transportation**

# **TRANSIT BENEFIT PROGRAM APPROVER 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: <a href="https://www.transportation.gov/transerve/participants/departments-state-dos">https://www.transportation.gov/transerve/participants/departments-state-dos</a>			



## 2. ACCESSING THE TRANSIT APPLICATION

### 2.1 Login

Use the following steps to access the application:

1. Enter the URL: [Transit Benefit Program Application System](#). The Transit Application login page is displayed.
2. Enter the username in the User Name textbox.
3. Enter the password in the Password textbox.
4. Click the **Log In** button.

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

**Note:** Approvers must register to be added to the web application. However, they do not have to enroll in the transit benefit program. Once the user has registered the User Role will be elevated from Applicant to the applicable approval level. See the Transit Benefit Applicant Guide for steps to register.

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

**Figure 1: Transit Application Log In page**


**Figure 2: Multi-Factor Authentication Login page**



## 2.2 Session Time Out

If your session is inactive (i.e., you have not typed data into an existing page, requested a new page, submitted data, etc.) for 45 minutes, you will be automatically logged out.

## 2.3 Exit

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

## 2.4 Select Proxy

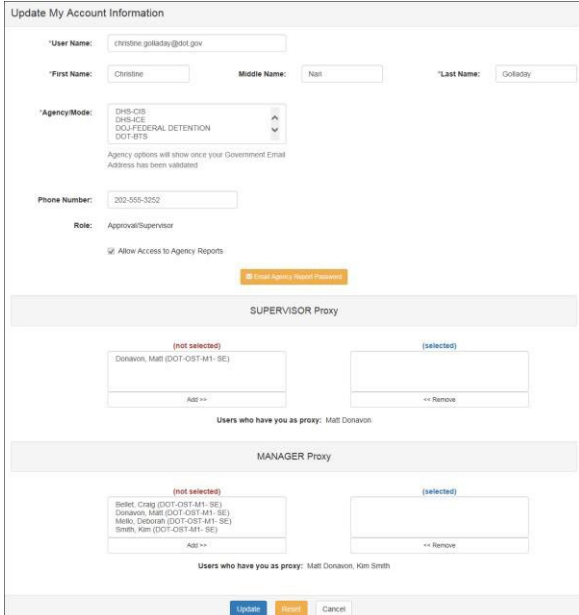
The My Account page allows the user to select a proxy. The functionality to assign a proxy is available for Approving Officials, Supervisors, Managers, and Program Admins.

Use the following steps to select a proxy:

- From the Home page, click the **My Account** button. The Update My Account Information page displays.

**Note:** Available supervisor and/or managers will be displayed in the Add select box.

- Select the proxy. Click the **Add** button to add the proxy to the **(Selected)** column on the right.



**Figure 3: Update My Account Information (Proxy)**


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



**Figure 4: Selected Proxy**

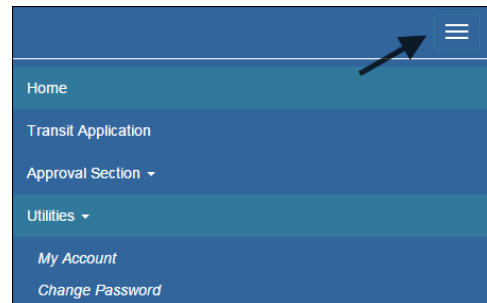
Approvers that have the logged-on user set as their proxy will be displayed below the table.

**Note:** If the user has access to the Agency Reports a checked box will be displayed on this page and an Agency Reports button will be displayed on the Home page.




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

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



**Figure 5: Utilities Menu Options**

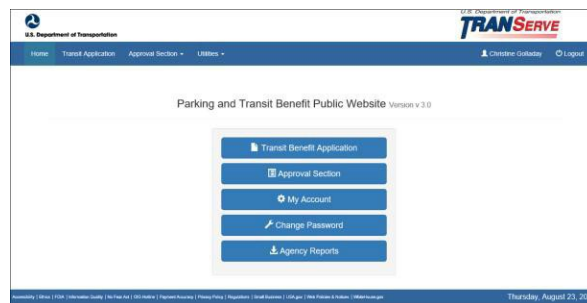


### 3. OVERVIEW OF THE PTB PUBLIC WEBSITE HOME PAGE

The tabs and links available to you on the PTB Public Website home page are determined by your assigned user role. User roles are assigned by the system administrator.

The PTB Public Website home page is divided into two sections:

- The menu bar displays at the top of the page and displays the following:
  - ◆ Home – Click this tab to display the home page.
  - ◆ Transit Application – Click this tab to display the *Select an Action to Continue* page.
  - ◆ Approval Section – This functionality is only available for TRANServe TBMs, TRANServe Admins, System Administrators and Approving Officials: Supervisors, Managers, and Program Admins. Click this tab to display the available approval levels. Approved Records, Disapproved Records and Competed Records can also be accessed from this tab.
  - ◆ Utilities – Click this tab to display My Account and Change Password sub-menu options.
  - ◆ Logout – Click this tab to logout of the application.
- The main section of the home page displays buttons representing functions you can execute within the application.
  - ◆ Transit Benefit Application – Click this button to display the *Select an Action to Continue* page.
  - ◆ Approval Section – This functionality is only available for Approving Officials: Supervisors, Managers, and Program Admins. Click this button to display the approval page.
  - ◆ My Account – Click this button to display the *Update My Account Information* page.
  - ◆ Change Password – Click this button to display the *Change Password* page.
  - ◆ Agency Reports – There are two types of agency reports. Daily Agency Reports and Monthly Agency Reports. These options are only displayed when assigned by an administrator. Click this button to display the *Agency Reports* page.



**Figure 6: PTB Public Website Home page**

## 4. APPROVAL SECTION

The Approval Section allows the user to approve or disapprove transit benefit applications and withdrawals. The user must be a Supervisor, Approval Officer or 1<sup>st</sup> Approver, Approval/Supervisor (a combination of the 1<sup>st</sup> and 2<sup>nd</sup> Approvers), Manager/Fund Certifier or 2<sup>nd</sup> Approver.

### 4.1 Approval Process

1. Log on as an approver.
2. From the Home page, click the **Approval Section** button; the approval page is displayed.

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

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

Figure 7: Approval page

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

3. Select **Approve** to approve the application. After the selection is made the label will change into a checkmark. A reason for approval can be entered but is not required.
4. Select **Disapprove** to disapprove the application. After the selection is made the label will change into a checkmark. A reason is required when an application is disapproved. Enter a reason in the Reason textbox.

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

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

Pending Transit Application 8

Number of Pending Applications

Approve Pending Application

Disapprove Pending Application

Number of Selected Applications to be Processed



### 4.1.1 Commuting Distance

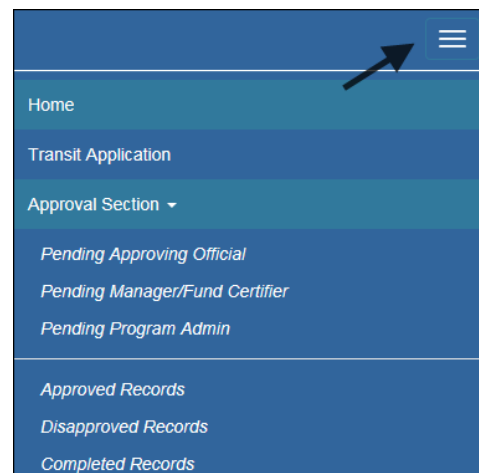
**Note:** If the Agency is tracking the commuting distance, the Approve and Disapprove buttons will not be displayed. The Approver will need to review the commuting distance address before the application can be processed.

1. Click the **View** button to display the Transit Benefit Application Worksheet.
2. Check the **I acknowledge that I have reviewed the Commuting Distance Information for the application** checkbox to enable the Approve and Disapprove buttons.

**Note:** Applicants displayed on the active page can be filtered by entering in the first few letters of the Mode, Admin, Type, and Name. To filter by date, enter in the date benefits were requested in the Request Date filter textbox.

**Note:** Click the arrows next to the column headers to sort applicants in ascending or descending order.

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



**Figure 8: Approval Section Menu Options**

### 4.1.2 Delete Application

1. From the Approval page, click the **Delete** button. The Delete Confirmation message is displayed at the top of the application page.
2. Click the **Continue** button to delete the application. The approval page is re-displayed with the delete confirmation at the top of the page.

**Note:** The submitted application will be deleted and the applicant will need to resubmit the application.

Figure 9: Delete Confirmation page

## 4.2 Approved/Disapproved/Completed Records

From the Home page; hover over the Approval Section menu option. Select the type of records to be viewed by selecting the link name.

Mode	Admin	Request Date	Type	Name	Approval Date
DOT-OST-M	OST-M	05/19/2014	New Transit Benefit Participant	RAE SUNSHINE	05/19/2014 03:55:20 PM
DOT-OST-M	OST-M-01	01/13/2016	12345	HUNG TEST CHUN	01/13/2016 01:15:53 PM
FDIC		12/22/2015	New Transit Benefit Participant	KAMERON GRETCHENTEST	01/07/2016 01:06:24 PM

Figure 10: Approved Records

Mode	Admin	Request Date	Type	Name	Reason
DOT-OST-M	OST-M-01	07/07/2015	SmartTrip and Rate Change	MOBILE APPTTEST	TEST
ED	OUS	10/30/2015	Rate Change	DARREN CHANG	gri/tgri
FDIC	DC	10/29/2015	Rate Change	PAMELA LIPSCOMBS	TEST Disapproval

Figure 11: Disapproved Records

When the Completed Records link is selected; the Find Completed Applications page is displayed. Enter a First Name, Last Name, or select an Agency/Mode from the dropdown to limit the search results. Click the **Search** button to return all completed records.

Figure 12: Find Completed Applications page

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

Mode	Admin	Request Date	Type	Name
DDD-NCR	A-NGB	12/30/2015	Agency Change	ANNIE AARON
DOT-FTA	FTA	09/03/2015	TEST CERTIFICATION	HUNG CHUN
DOT-FTA	FTA	09/04/2015	Agency Change	HUNG CHUN

Figure 13: Completed Records

## 5. AGENCY REPORTS

Use the following steps to download an agency report:

1. From the Home page; click the **My Account** button. The Update My Account Information page displays.
2. Click the applicable password request button. A confirmation message is displayed.

**Note:** If you have access to both Daily Agency Reports and Monthly Agency Reports, a password request 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.

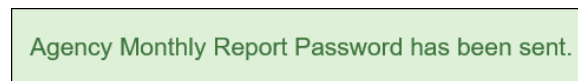
**Note:** The same steps are used to download daily and monthly agency reports.

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.

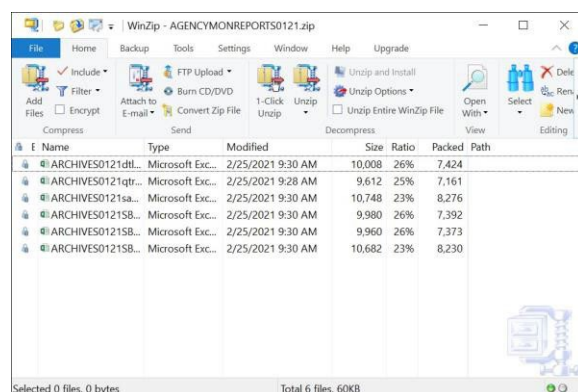
**Figure 14: Update My Account Information page**



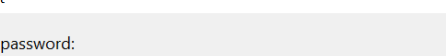
**Figure 15: Agency Report Password Confirmation page**

**Figure 16: Agency Reports page**

**Figure 17: Open/Save Dialog Message**



**Figure 18: Zip File**

- 
- Decrypt
- Enter password:
- 
- ☒ Hide the password
- OK Cancel Help

The screenshot shows an Excel spreadsheet titled "Transit Benefits Summary Report by Administration ARCHIVES". The data is for January 2021. The spreadsheet is organized into columns: Administration, Number Issued, Amount Issued, YTD Num Issued, and YTD Amt Issued. The data rows are as follows:

Administration	Number Issued	Amount Issued	YTD Num Issued	YTD Amt Issued
ADMIN	6	\$30.00	6	\$30.00
PANA AMET	0	\$0.00	0	\$0.00
PANA AMET	0	\$0.00	0	\$0.00
WEST VALLEY CARPENTRY	0	\$0.00	0	\$0.00
WEST VALLEY CARPENTRY	0	\$0.00	0	\$0.00
WEST VALLEY CARPENTRY	0	\$0.00	0	\$0.00
WEST VALLEY CARPENTRY	0	\$0.00	0	\$0.00
WEST VALLEY CARPENTRY	0	\$0.00	0	\$0.00
WEST VALLEY CARPENTRY	0	\$0.00	0	\$0.00
WEST VALLEY CARPENTRY	0	\$0.00	0	\$0.00
<b>Total</b>	<b>6</b>	<b>\$30.00</b>	<b>6</b>	<b>\$30.00</b>



**Bowhead**