

**Office of Finance and Operations
Office of Security, Facilities, and Logistics, Services
Transportation Services Branch**

TRANSIT BENEFIT APPLICATION GUIDE



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Transit Benefit Application Guide

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1 INTRODUCTION

1.1 PURPOSE

The purpose of this document is to guide the user on applying for the Department of Education's Transit subsidy program. The Transit Benefit application process consists of four steps:

- 1) Completion of the Integrity Awareness Training via the FedTalent System,
- 2) Register and apply to online TRANServe website, and
- 3) Complete and submit application via online TRANServe website.
- 4) Secure and register your SMARTrip card or TRANServe Credit Card

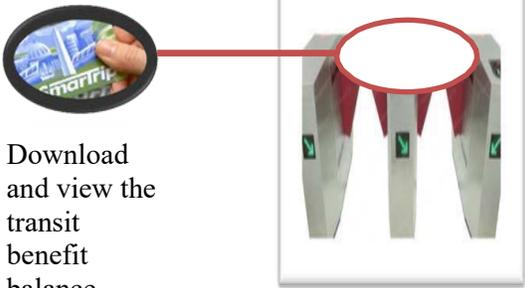
1.2 BACKGROUND

The Department of Education offers a monthly allotment of up to three hundred and fifteen dollars (\$315) to assist employees with home-to-work commuting costs.

1.3 PAYMENT OPTIONS

There are two payment options:

*TRANServe benefits cannot be used for SMARTrip card (Metro) or Parking.

 <p>Download and view the transit benefit balance here.</p>	
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Transit Benefit Application Guide

SMARTrip Card (DC Metropolitan Area)	TRANServe Credit Card (Nationwide)
<ul style="list-style-type: none">• A SmarTrip purchased online or through the SmarTrip app is automatically registered.• If the SmarTrip app were used to transfer a registered SmarTrip to Apple Wallet or Google Pay, the card would automatically be registered.• A SmarTrip purchased at a Fare Vending Machine, commuter store, or retail outlet can be <u>registered online or through the SmarTrip app</u>.• <u>Create a free SmarTrip account online or using the SmarTrip app</u> for access to card management and secure fare purchases.• 10 business days to receive benefits (auto-load via metro gate turnstile)• Benefits auto-load on the first of the month (smart benefits balance viewed ONLY via metro gate turnstile display panel)• Separates personal and transit benefits funds.	<ul style="list-style-type: none">• 7-10 business days to receive.• Accepted Nationwide by transit authorities.• Online payment options IMPORTANT: The card is allocated funds on the 10th of every month. Example: Funds added on January 10 are for February. <p>NOTE: Any remaining balance is credited to the agency on the 9th of every month.</p>

2 APPLICATION PROCESS

2.1 INTEGRITY AWARENESS TRAINING

Complete the Transit Benefit Integrity Awareness Training via FedTalent.

NOTE: INTERNS ONLY need to obtain the PowerPoint version of the Integrity Awareness Training by clicking this link – [Transit Integrity Awareness Training](#) - and open the file located under the Helpful Links section.

EDUCATION EMPLOYEES: Click [FedTalent](#) and sign in with your ED-assigned username.

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Welcome to the FedTalent System

The FedTalent System is the Department of Education's system used to track and manage the training requirements of federal employees.

FedTalent supports both mandatory training activities and individual development. Some of the key features of the learning module include the following:

- supports completion of mandatory online courses;
- allows access to thousands of online SkillSoft courses, books, and videos that cover a wide range of topics such as information technology, Microsoft office products, personal communications, leadership, and management development;
- provides the ability to register for locally provided instructor led training courses.

Please explore FedTalent and leverage the many developmental opportunities that it affords.

Accessing FedTalent

Login

Accessing Percipio



Transit Benefit Application Guide

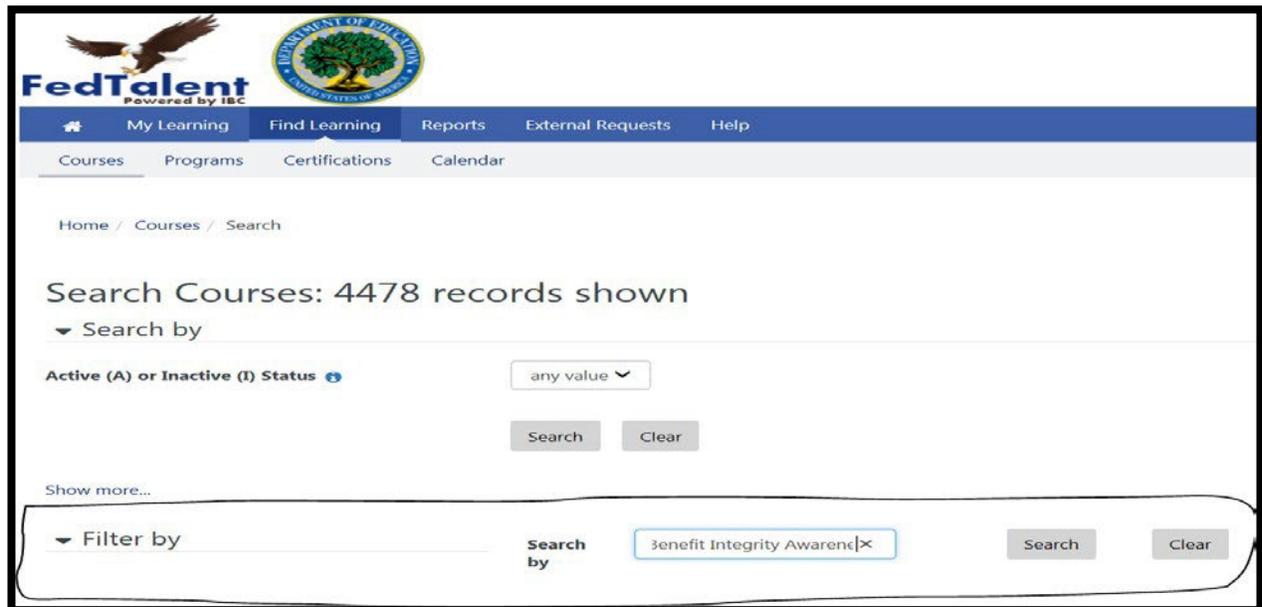
From the Home screen

- Hover the cursor over “Find Learning” and click “Courses.”



Courses window screen

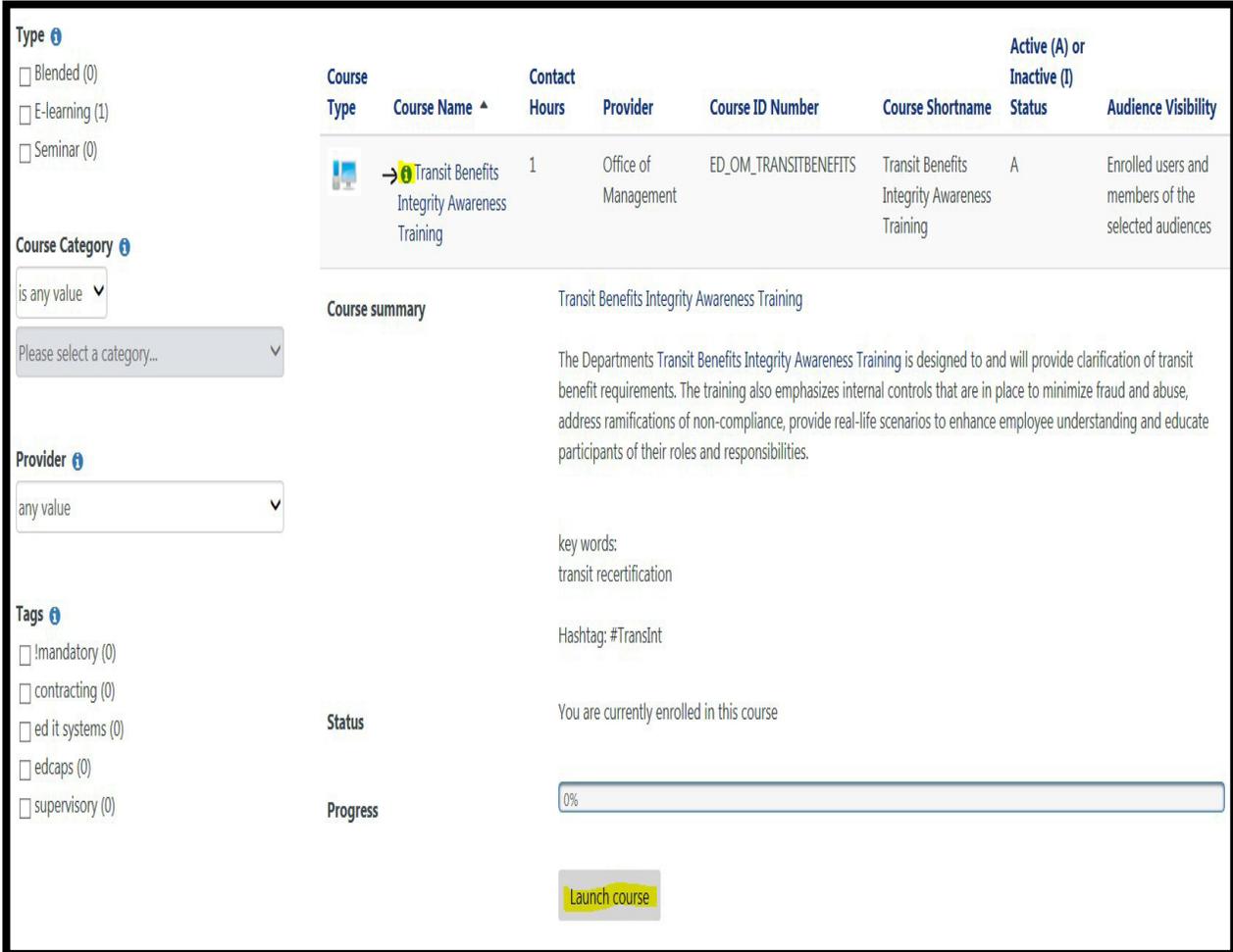
- Enter “Transit Benefit Integrity Awareness Training” in the “Search by” box and click “Search”



Transit Benefit Application Guide

To open the “Course Summary”

- Click the  icon to open the “Course Summary”
- Click “Launch Course” to access the training
- Complete the training



The screenshot displays a course management interface. On the left, there are filter sections for 'Type', 'Course Category', 'Provider', and 'Tags'. The 'Type' section includes checkboxes for 'Blended (0)', 'E-learning (1)', and 'Seminar (0)'. The 'Course Category' section has a dropdown menu currently set to 'is any value'. The 'Provider' section has a dropdown menu set to 'any value'. The 'Tags' section includes checkboxes for ':mandatory (0)', 'contracting (0)', 'ed it systems (0)', 'edcaps (0)', and 'supervisory (0)'. The main area shows a table of courses with columns: 'Course Type', 'Course Name', 'Contact Hours', 'Provider', 'Course ID Number', 'Course Shortname', 'Active (A) or Inactive (I) Status', and 'Audience Visibility'. One course is listed: 'Transit Benefits Integrity Awareness Training' with 1 hour, provided by the 'Office of Management', ID 'ED_OM_TRANSITBENEFITS', shortname 'Transit Benefits Integrity Awareness Training', status 'A', and audience 'Enrolled users and members of the selected audiences'. Below the table, the 'Course summary' for this course is shown, including a description, key words ('transit recertification'), and a hashtag ('#TransInt'). The 'Status' section indicates 'You are currently enrolled in this course'. The 'Progress' section shows a progress bar at 0%. A 'Launch course' button is located at the bottom.

Course Type	Course Name	Contact Hours	Provider	Course ID Number	Course Shortname	Active (A) or Inactive (I) Status	Audience Visibility
	→  Transit Benefits Integrity Awareness Training	1	Office of Management	ED_OM_TRANSITBENEFITS	Transit Benefits Integrity Awareness Training	A	Enrolled users and members of the selected audiences

Course summary Transit Benefits Integrity Awareness Training

The Departments Transit Benefits Integrity Awareness Training is designed to and will provide clarification of transit benefit requirements. The training also emphasizes internal controls that are in place to minimize fraud and abuse, address ramifications of non-compliance, provide real-life scenarios to enhance employee understanding and educate participants of their roles and responsibilities.

key words:
transit recertification

Hashtag: #TransInt

Status You are currently enrolled in this course

Progress 0%

[Launch course](#)

2.2 REGISTER IN TRANSERVE WEBSITE

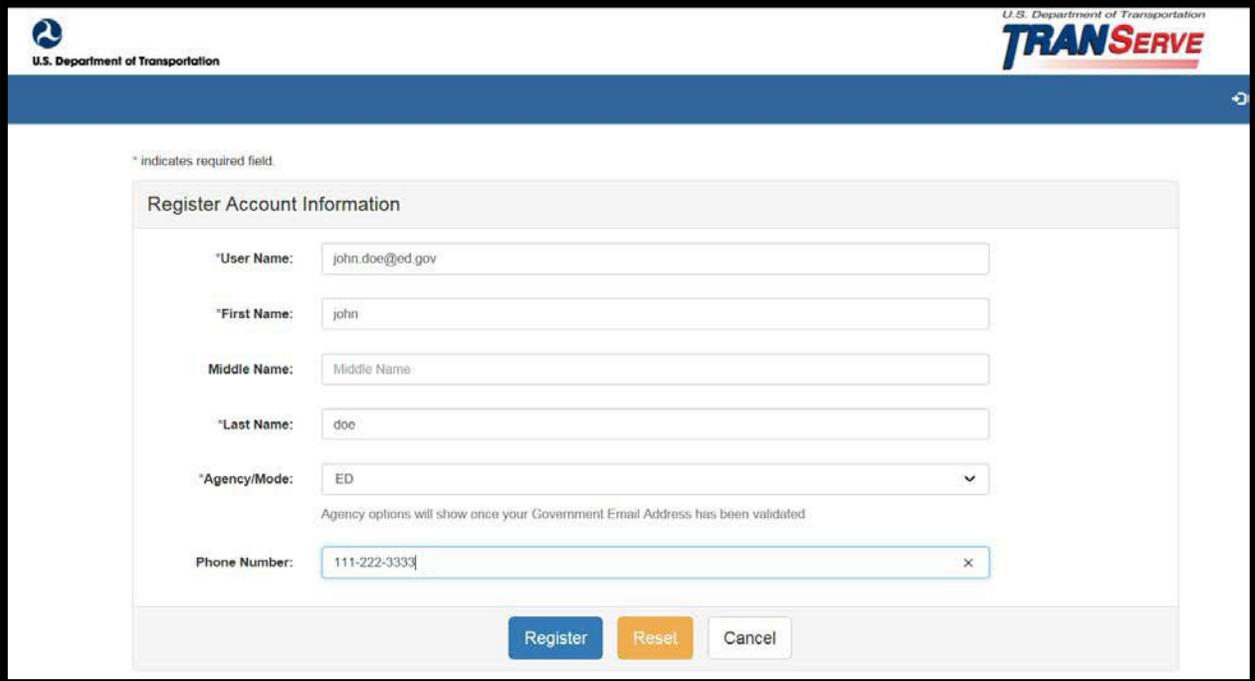
Access the ED/TRANServe website

Click this link [ED TRANSERVE](#)

- to access the TRANServe log-in screen
- Click “Register” to register within the TRANServe system

Complete the Registration form

- User your ED email address as your username and enter your desk phone number
- Click “Register”



The screenshot shows the TRANServe registration form. At the top left is the U.S. Department of Transportation logo, and at the top right is the TRANSERVE logo. Below the logos is a blue header bar. The main content area is titled "Register Account Information" and contains several input fields: "User Name" (john.doe@ed.gov), "First Name" (john), "Middle Name" (Middle Name), "Last Name" (doe), "Agency/Mode" (ED), and "Phone Number" (111-222-3333). A note below the Agency/Mode field states "Agency options will show once your Government Email Address has been validated." At the bottom of the form are three buttons: "Register" (blue), "Reset" (orange), and "Cancel" (white).

After completing the registration form, the system will generate a generic password that will be sent to your ED email address, and you will be returned to the “Log In” screen. Enter your username as your ED email address and enter the generic password that you received from the TRANServe system.

- Click “Log In” after entering your username and password

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U.S. Department of Transportation

* indicates required field.

Login

*User Name:

*Password:

[Log In](#) [Forgot Password?](#)

Not registered yet? [Register](#)

*****WARNING***WARNING***WARNING****

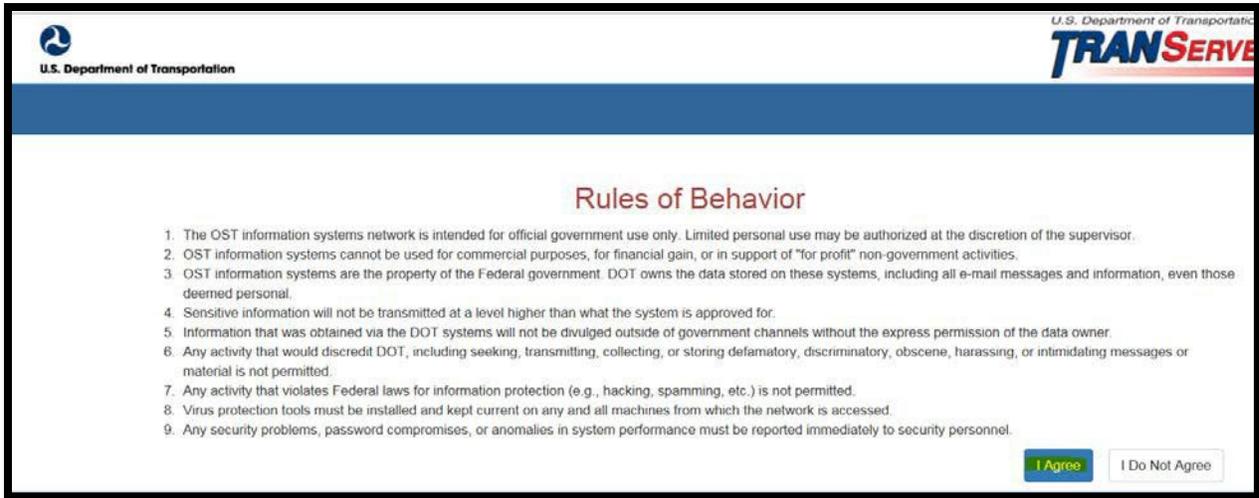
You are accessing a U.S. Government information system, which includes this computer, the computer network on which it is connected, all other computers connected to this network, and all storage media connected to this computer or other computers on this network. This information system is provided for U.S. Government use only. Unauthorized or improper use of this information may result in disciplinary action, as well as civil and criminal penalties. By using this information system you consent to the following:

1. You have no reasonable expectation of privacy regarding any communications or data transiting this network or stored in this information system.

*****WARNING***WARNING***WARNING****

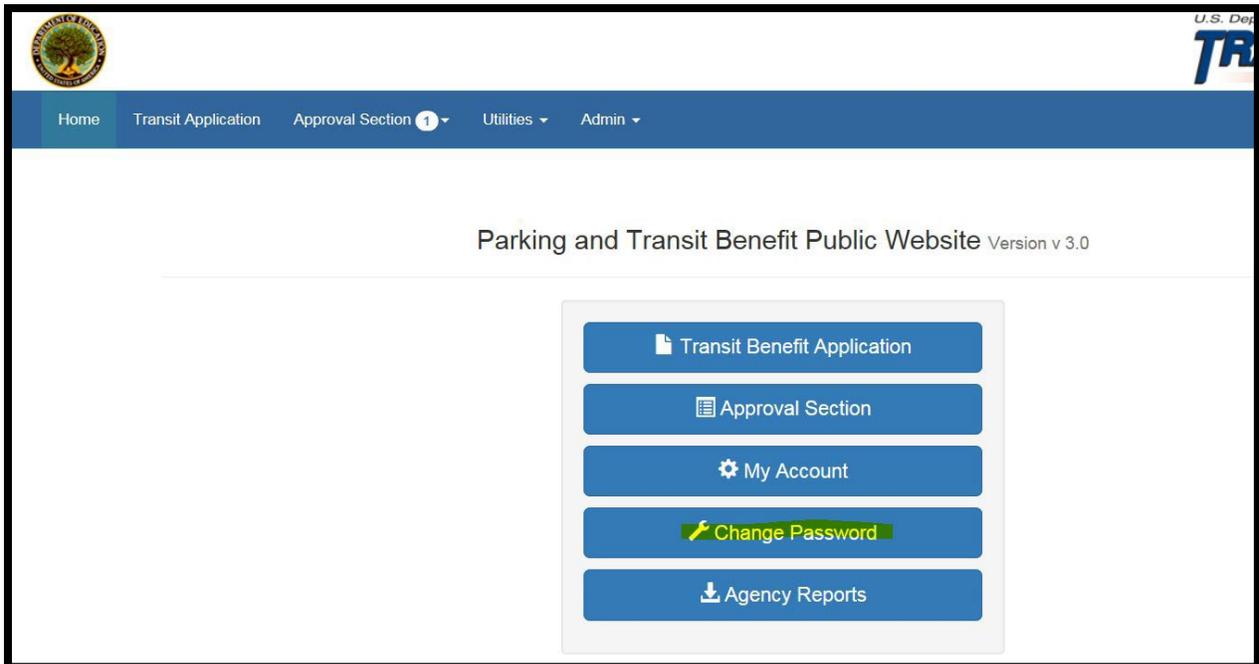
Transit Benefit Application Guide

After Logging in, you will enter the “Rules of Behavior” screen. Please read the Rules of Behavior information and click “I Agree.”



2.3 CHANGE PASSWORD

Once logged in, change your password by selecting “Change Password.”



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Complete the “Change Password” form and click submit.

Change Password Current Password Expires in 8 days

*Current Password: [Show Hint](#)

*Create New Password:

*Confirm New Password:

*Create a Hint:

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(s) 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-alphabetic characters (for example, !, \$, %)

Password will expire 60 days after being set
Passwords cannot be reused within the last 24 changes.

You will be redirected to the login page and will need to login with your new password

[Submit](#) [Cancel](#)

Once you have successfully changed your password, a message will be displayed on the top of the screen that says, “Your Password has been successfully changed.”

Your Password has been successfully changed.
Use your Username and New Password to login to the system.

* indicates required field.

Login

*User Name:

*Password:

[Log In](#) [Forgot Password?](#)

Not registered yet? [Register](#)

WARNINGWARNING**WARNING**

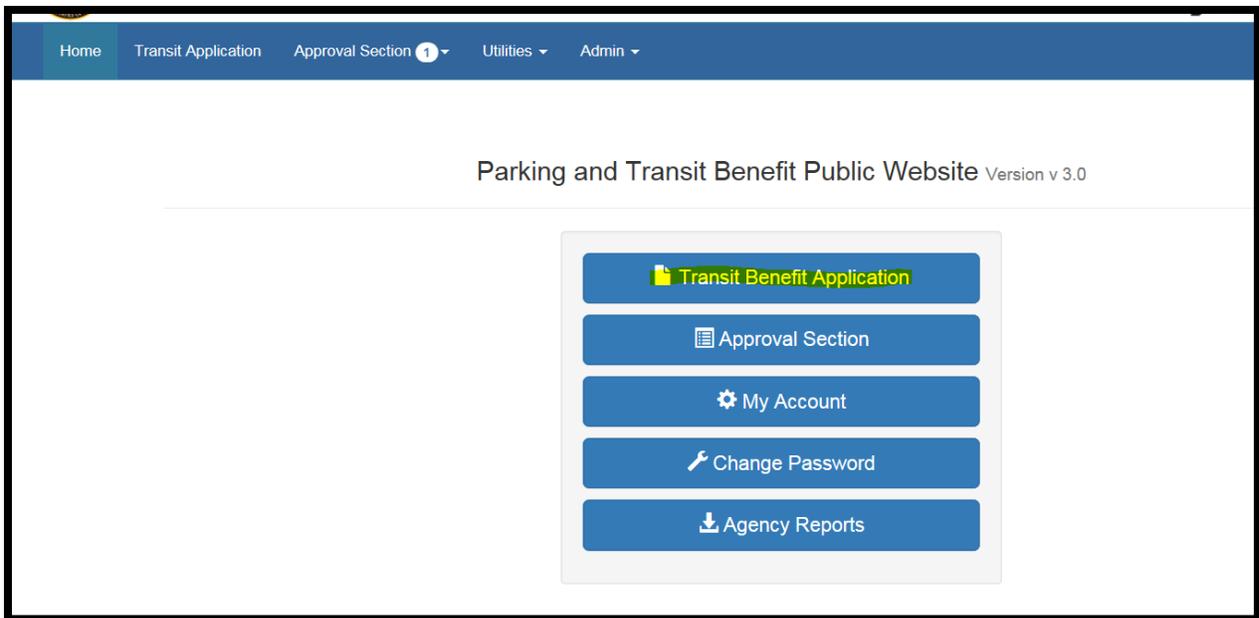
- Enter username and password and log in

2.4 COMPLETE AND SUBMIT ONLINE APPLICATION

There are three options within the **Home** screen:

- Transit Benefit Application – directs user to Transit Application screen where the participant can select an action to request information, withdraw from the program, address/SMARTrip change, and/or certify/enroll.
- My Account – Allows users to change personal information. Users can use this option to change their name and phone number.
- Change Password – Allows user to change password.

In the TRANServe Home page, select “Transit Benefit Application.”



On the next screen, there are 4 options:

- Request for Information: Choose this option for any questions regarding the transit program.
- Withdraw from the Program: Choose this option to withdraw from ED’s transit benefit program.
- Address/SMARTrip Change: Choose this to change SMARTrip card information.
- Certify/Enroll: Choose this option for new users, annual recertification, or increasing/decreasing benefits.

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Click the radio button on “Certify/Enroll” to enroll as a new user

- Click Continue

Select an Action to Continue

Employer: Department of Education

Request Information ?

Withdraw from the Program ?

Address/Smartrip Change ?

Certify/Enroll ?

Continue

YOU MUST AGREE TO THE TERMS AND CONDITIONS OF THE TRANSIT BENEFIT PROGRAM TO PROCEED WITH THE APPLICATION.

WARNING !

This certification concerns a matter within the jurisdiction of an agency of the United States. Making a false, fictitious, or fraudulent certification may constitute criminal violations punishable under Title 18, United States Code, Section 1001, by imprisonment up to five years and fines up to \$10,000 for each offense, and/or agency disciplinary actions up to and including dismissal.

- 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 at this or any other federal agency.
- I certify that I am eligible for a public transportation fare benefit, will use it for my daily commute to and from work by public transit or vanpool, 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 per month 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 work due to sickness, vacation or any other reason, on official travel, or use a private vehicle for commuting, I will claim less and adjust the amount of my transit benefit the following month if 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.

I Agree I Do Not Agree

Transit Benefit Application Guide

Read the terms and conditions of the Transit Benefit Program.

- Click “I Agree” to proceed with the Transit Benefit Application Worksheet.

In the Transit Benefit Application Worksheet, below are the following options for the “Reason for Certification” field:

- **Address or SmarTrip® Card Number Change** – allows the participant to change the SMARTrip card number and address information.
- **Agency** – not applicable
- **Annual Certification/Recertification** – allows the participant to submit an Annual Recertification application.
- **New Transit Benefit Participant** – This is for employees who want to participate in ED’s transit program.
- **Rate Change** – This is for participants who want to change the rate of their commuting expenses.
- **Vendor and Rate Change** – For participants who want to change both the vendor and rate of their commute.

For all new employees, please choose the option “New Transit Benefit Participant.”

* indicates required field.

Certify/Enroll

 Transit Benefit Application Worksheet

All Transit Benefit Program Applicants are required to certify the **"Total Monthly Expense"** of their [Home to Work Mass Transit Commute](#).

Parking fees are not eligible for the transit benefit and must not be included in "Total Monthly Expense".

Instructions: To calculate your **"Total Monthly Expense"**

- Select your transportation method(s)
- Enter the following information in the "To Work" and "From Work" row(s) of each transportation method:
 - Name of Company for your method of transportation (Metro, BART, Subway)
 - Daily or Monthly Expense
 - Number of days you routinely work in a month
- If you purchase a Monthly pass, divide the price of the pass by 2, and enter the information in the Monthly Expense column.
- The Total Monthly Expense value automatically populates

***Reason for Certification:**

- Address or SmarTrip® Card Number Change
- Agency Change
- Annual Certification/Recertification
- New Transit Benefit Participant**
- Rate Change
- Vendor and Rate Change

Civilian/Military:

Work Status: Full Time

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In the Civilian/Military field, choose the Civilian option.

In the “Work Status” field, choose the best option that best suits your employment status:

- **Full Time** – for full-time employees.
- **Part Time** – for part-time employees.
- **Intern** – for interns and volunteer interns.

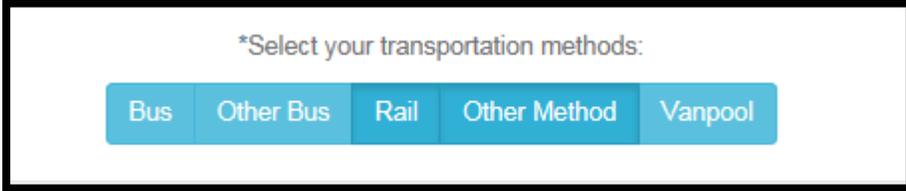


The screenshot shows two dropdown menus. The first is labeled 'Civilian/Military:' and has 'CIVILIAN' selected. The second is labeled 'Work Status:' and has 'Full Time' selected.

In the Transit Benefit Transportation Methods, choose the following options:

- **Bus** – local metropolitan transportation busses.
- **Other Bus** – commuter Buses.
- **Rail** – local metropolitan train services, i.e., MARTA, BART, WMATA, etc...
- **Other Methods** – other train services, i.e., VRE, MARC, Fairy, etc...
- **Vanpool** – a ride-sharing service that includes two or more members commuting together.

Please click on the appropriate tab to add a transportation method. Below is an illustration of the transportation method tabs. Highlighted in dark blue, both Rail and Other Method tabs are actively added.



The screenshot shows a row of five tabs: 'Bus', 'Other Bus', 'Rail', 'Other Method', and 'Vanpool'. The 'Rail' and 'Other Method' tabs are highlighted in a dark blue color, indicating they are selected.

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Complete the following fields of the Transit Benefit Transportation Method section:

- **Name of Company** – enter the name of your transportation services company, i.e., Metro, MARC, VRE, etc...
- **Daily Expense** – enter the amount of daily commuting expense in both fields, rail to work and rail from work. The monthly expense field will automatically calculate once all daily and days per month fields are completed.
- **Days per Month** – the program is based on a 20-day work schedule per month. Enter how many days you will be commuting to work. Please account for your telework schedule within this section. For example, if you telework one (1) day per week, which is a total of four (4) days per month, and subtract it from the 20-day monthly work schedule, this will provide the amount of “Days per Month” that you will be commuting to work.

🏠 Transit Benefit Transportation Methods

Always follow your Agency work schedule policy for specific guidance on the Days per Month entry.

Defined 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 18 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 telecommute or work part time, enter the number of days you actually commute to/from work.

*Select your transportation methods:

Bus
Other Bus
Rail
Other Method
Vanpool

Rail to Work:	<input type="text" value="Metro"/> <small>Name of Company</small>	<input type="text" value="\$ 1.65"/> <small>Daily Expense</small>	<input type="text" value="16"/> <small>Days per Month</small>	<input type="text" value="\$ 26.40"/> <small>Monthly Expense</small>
Rail from Work:	<input type="text" value="Metro"/> <small>Name of Company</small>	<input type="text" value="\$ 1.65"/> <small>Daily Expense</small>	<input type="text" value="16"/> <small>Days per Month</small>	<input type="text" value="\$ 26.40"/> <small>Monthly Expense</small>
Other Method to Work	<input type="text" value="Train"/> <input type="text" value="VRE"/> <small>Name of Company</small>	<input type="text" value="\$ 8.55"/> <small>Daily Expense</small>	<input type="text" value="16"/> <small>Days per Month</small>	<input type="text" value="\$ 136.80"/> <small>Monthly Expense</small>
Other Method from Work	<input type="text" value="Train"/> <input type="text" value="VRE"/> <small>Name of Company</small>	<input type="text" value="\$ 8.55"/> <small>Daily Expense</small>	<input type="text" value="16"/> <small>Days per Month</small>	<input type="text" value="\$ 136.80"/> <small>Monthly Expense</small>

Every Transit Benefit Program Participant is responsible to adjust the amount of their transit benefit each month to reflect the actual cost of their home to work commute.

Total Monthly Expense:

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In the Transit Benefit Program Application section, please enter your work information:

- **Name, Email, and Common Identifier** – this section will be prepopulated.
- **Work Phone** – enter your desk phone number.
- **Admin** – enter the appropriate principal office for which you work.
- **Work Address** – enter your work location address.

Transit Benefit Program Application

*Last 4 SSN:

Name: MURRISH SIDNEY N
(Last) (First) (Middle)

Email Address: Sidney.Murrish@ed.gov *Work Phone:

Common Identifier:

Department of Education

*Select Your Agency: *Region:

*Admin:
Populates from Select Your Agency

I certify that my usual **monthly Transit commuting costs** are:
This field is automatically calculated

Work Information

*Work Address:

*Work City: *Work State: *Work Zip:

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Complete the Residence Information and the Approver Information section of the application.

- **First Approver (Executive Officer)** – First Approver is the name of the Executive Officer for your Principal Office
- Click the blue “Select” button to choose the appropriate First Approver.
- **Manager/Fund Certifier** – choose “COORDINATOR ED TRANSIT BENEFIT.”
- **Points of Contact** – all names are under DeNeen Rapley. Please choose the appropriate region.
- **Manager Phone** – not required.
- **SMARTrip® Card Number** – participants using only SMARTrip Benefits, enter your SMARTrip card number.
- **TRANSERVE Credit Card** - participants using the TRANServe Credit card, should enter “NA.” For participants splitting their benefits between SMARTrip Benefit and TRANServe Credit card, enter your SMARTrip card number.
- **Comment section for Agency Approver** – for participants splitting their benefits between a SMARTrip card and a TRANServe Credit card, please include a statement of how you would like your benefits separated in the comment box.

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Example: “I would like my benefits split in the following way: SMARTrip Card: \$100 and TRANServe Card: \$170.”

The screenshot displays a web form with two main sections: "Residence Information" and "Approver Information".

Residence Information:

- *Address: 123 Idontknow Street
- Address 2: (empty)
- *City: Somewhere
- *State: WI (dropdown menu)
- *Zip: 11111

Approver Information:

- *First Approver: DAVIS, WANDA (with "Select..." button). Below it: "Click the Select button to select First Approver".
- *Manager/Fund Certifier: COORDINATOR ED TRANS (with "Select..." button). Below it: "Click the Select button to select Manager/Fund Certifier".
- *Point of Contact: DENEEN RAPLEY ROSE (with "Select..." button). Below it: "Click the Select button to select Point of Contact".
- Manager Phone: (empty text box).
- *SmarTrip Card Number: NA
- Comment for Agency Approvers: (empty text box). Below it: "You have 1995 characters remaining".

3 WITHDRAWAL PROCESS

3.1 WITHDRAWING FROM THE PROGRAM

To withdraw from the transit benefit program, choose the option “**Withdraw from the Program**” on the “Select an Action to Continue” screen.

The screenshot shows a web interface with a status bar at the top: "Your Current Application Status: Change Request Completed (08/04/2018)".

The main heading is "Select an Action to Continue". Below it, a modal window titled "Employer: Department of Education" is displayed. This modal contains a list of actions:

- Request Information
- Withdraw from the Program
- Address/Smartrip Change
- Certify/Enroll

A "Continue" button is located at the bottom right of the modal.

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In the Withdraw screen, complete the following fields:

- **Withdrawal Date** – enter your effective withdrawal date. This will be the date that your benefits will be deactivated.
- **First Approver** – Your Principal Office Executive Officer’s name.
- **Manager/Fund Certifier** – Choose “Coordinator ED Transit Benefits”.

* indicates required field.

Withdraw from the Program

Last 4 SSN: ****

Name: [Redacted] [Redacted] [Redacted]
(Last) (First) (Middle)

Email Address: [Redacted]

Agency/Mode: Department of Education (ED)

***Work Phone:**

***Withdrawal Date:** 
Click the Calendar to select a Withdrawal Date

***First Approver:**
Click the Select button to select First Approver

***Manager/Fund Certifier:**
Click the Select button to select Manager/Fund Certifier

Comment for Agency Approvers:
You have 1995 characters remaining

4 TRANServe CREDIT CARD

4.1 TRANServe CREDIT CARD ACTIVATION

1. All cards are shipped directly to your home address listed on your application.
2. Activate your card by calling U.S Bank Customer Service at 1-888-994-6722. You will need the following:
 - Work Zip code – 20202
 - Purchase Limit Amount – This information is the monthly commuting cost you entered in your Transit Benefit online application.
 - For credit card posting purposes, please purchase your tickets, passes, or other fare by the 4th of each month to prevent a disruption in your following month's benefit.

Your transit funds will be electronically deposited to your TRANServe Card on the 10th day of each month.

3. Select the “Credit” option when purchasing transit fare media.



NOTE: TRANServe Credit Card Balance

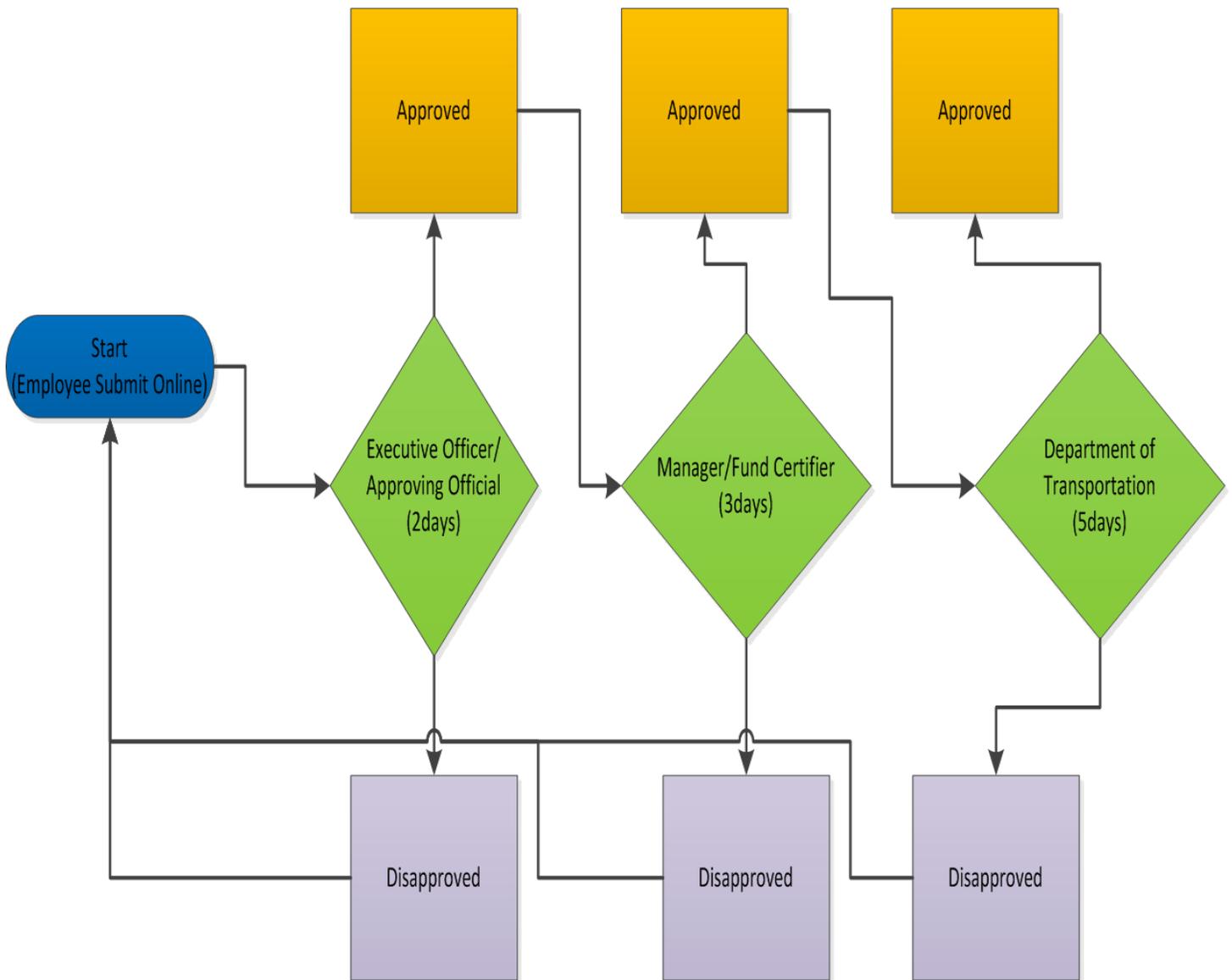
Here are four ways to keep track of your account balance.

1. Mobile app1: download the U.S. Bank Access® Online Mobile app from the Apple App® or Google Play™ stores.
2. Log in to Access Online at access.usbank.com, then go to My Personal Information
3. Visit access.usbank.com
4. To hear your balance, call 1-888-994-6722 or 711 for people who are deaf or hard of hearing. You must have your TRANServe Credit Card number available before calling. Please contact the Transportation Services Branch if you do not have your card number.

5 APPLICATION PROCESS

5.1 APPLICATION PROCESS FLOWCHART

The application process is a three-tier approval process. When an application is submitted, the Executive Officer will receive a generated email from the TRANServe system indicating that a new application has been submitted and is ready for approval. For each approval/disapproval, the participant will receive a generated email indicating the status of their application and whether it is approved/disapproved. Below is the three-tier approval process.



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SMARTrip Card Processing Timeframe – 10 business days; funds will auto-load onto the card electronically (if applications are received and approved by DOT).

TRANServe Card: Processing Timeframes – TRANServe Card will take 7 to 10 business days to receive for new participants and twenty-four hours for replacement cards.

6 EXECUTIVE OFFICERS LIST (APPROVING OFFICIAL LIST)

IMPORTANT NOTE: The Executive Officer List (Approving Official) updates periodically. Click on the link to obtain the [Executive Officer List](#). ****Please do not select any of the Transportation Services Branch employees as your Approving Official; doing so will significantly delay the processing of your application.**