UNITED STATES
PATENT AND TRADEMARK OFFICE

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Mandatory
Public Transit Subsidy (PTS) Certification Training

FY2025

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Topics

Program Overview

- Background

- TRANServe Roles and Responsibilities

- Transit Subsidy Coordinator Roles and Responsibilities

- Participant Roles and Responsibilities

Understanding the Certification Statement

Program Overview

Transit Benefit Program:
- Protects Nation's Infrastructure
- Reduces air pollution & traffic congestion
- Increases use of mass transit

Studies show traffic congestion:
- Wastes 1.9 billion gallons of gas
- Costs over $100 billion in wasted fuel & lost time
- Reduced commutes save individuals $200 monthly

Tax-free subsidy for *actual* costs of transportation
- Up to the maximum set by the IRS statutory limit

Background

Program History

- 1991 - Federal Transit Administration Program Pilot
- 1993 - Clean Air Act
- 2000 – E.O. 13150 Federal Workforce Transportation
- 2005 - SAFETEA-LU
- 5 U.S.C. § 7905 [Title 5, Part III of the U.S. Government Organization and Employees code]

Eligibility

- All USPTO federal employees
- All USPTO interns/externs
- **NOTE: USPTO Contractors are <u>NOT</u> eligible for this benefit**

Mass Transportation

- Rail (i.e. VRE, MARC, WMATA, AMTRAK)

- Bus (i.e. Metro, Fairfax Connector, DASH, DC Circulator, MTA Commuter Bus, Skyride)

- Ferry

- Trolley

- Qualified vanpools

Disallowed Transportation

- Uber

- Taxi

- Lyft

- Airfare

Please make sure you do not put these, or anything like them on your application, as those will be disapproved.

TRANServe Roles & Responsibilities

- Administers the Transit Benefit Program

- Distributes the transit benefit to qualified agency employees

- Establishes best practices

- Provides education, answers, and support to Program Offices

U.S. Department of Transportation

TRANServe

The Federal Government's Largest Transit Benefit Service Provider

RELIABLE • EFFICIENT • CERTIFIED COMPLIANT • SECURE

Capability Statement

Program Overview

The U.S. Department of Transportation has been distributing the transit benefit to federal employees since the early 1990s. TRANServe enables federal agencies to make use of a single established system with effective internal controls over the receipt, maintenance and distribution of the transit benefit to over 200,000 federal employees.

TRANServe is a fee for service program within the Department of Transportation that provides transit benefit program administration and distribution services for federal agencies. We alleviate the administrative burden of running the transit benefit program for our customers by assuming all data entry responsibilities in addition to providing best practices and resource tools. TRANServe has developed a staff with excellent qualifications and expertise on this program.

TRANServe provides unique advantages due to its size and breadth of experience and does this by working together with customers to ensure eligible employees receive their transit benefit and use it appropriately.

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Transit Subsidy Coordinator
Roles & Responsibilities

- Provides customer care and assistance to program participants

- Provides administrative and financial accountability

- Acts in the best interest of the USPTO and program participants at all times

Participant Roles & Responsibilities

- Understand the USPTO Transit Subsidy Program policy and guidelines found on SharePoint

- Participate in only one approved transportation benefit program at a given time

- Apply for benefit annually (make changes or withdraw as needed)

- Certify they understand the USPTO program policy and avoid misuse and/or fraud

How to Use Benefits?

- Use benefits to commute to and/or from work (exclude daily parking fees)
- Benefits are not transferable
- Misuse is prohibited
  - Giving
  - Selling
  - Trading
  - Transferring to other individuals
  - Purchasing the same from another individual

Should the Office decide to investigate any employee's eligibility for participation in the PTS program, the amount of benefits claimed, or failure to timely return unused subsidies where applicable, the employee will continue to receive benefits pending the Office's determination concerning eligibility. The Office may, however reduce or stop benefits once it makes a determination of ineligibility or reduced eligibility. **Employees may be required to repay benefits improperly claimed, and may be subject to disciplinary or collection action.**

PTS New Enrollment Training

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Key Requirements to apply for Transit Subsidy Benefit

1. Use your federal email address to create a User Account and register.

2. Complete the Transit Benefit Program Application.

Step 1. Direct link to TRANServe (DOT application system)

1. Open TRANServe using direct link

    • https://transitapp.ost.dot.gov/

Step 1. How to Access DOT application system

1. Open a browser

2. Go to: www.transportation.gov/transerve

3. Select: AGENCY PARTICIPANT PAGES

4. Scroll down to bottom of page/Select U.S Patent & Trademark Office (Under Additional Agencies)

5. Select Transit Benefit Program Application System

6. Select: Register

7. Complete: Register Account Information

8. Select: Blue "Register" prompt at bottom of page

9. Check emails/Sign in with system-generated password

10. Select: Transit Benefit Application

11. Select: Certify/Enroll

Step 2. Click "Register" and complete registration account information form

A temporary password is emailed to your official federal government email address.

Step 3. Wait for temporary password to Login to DOT TRANServe System
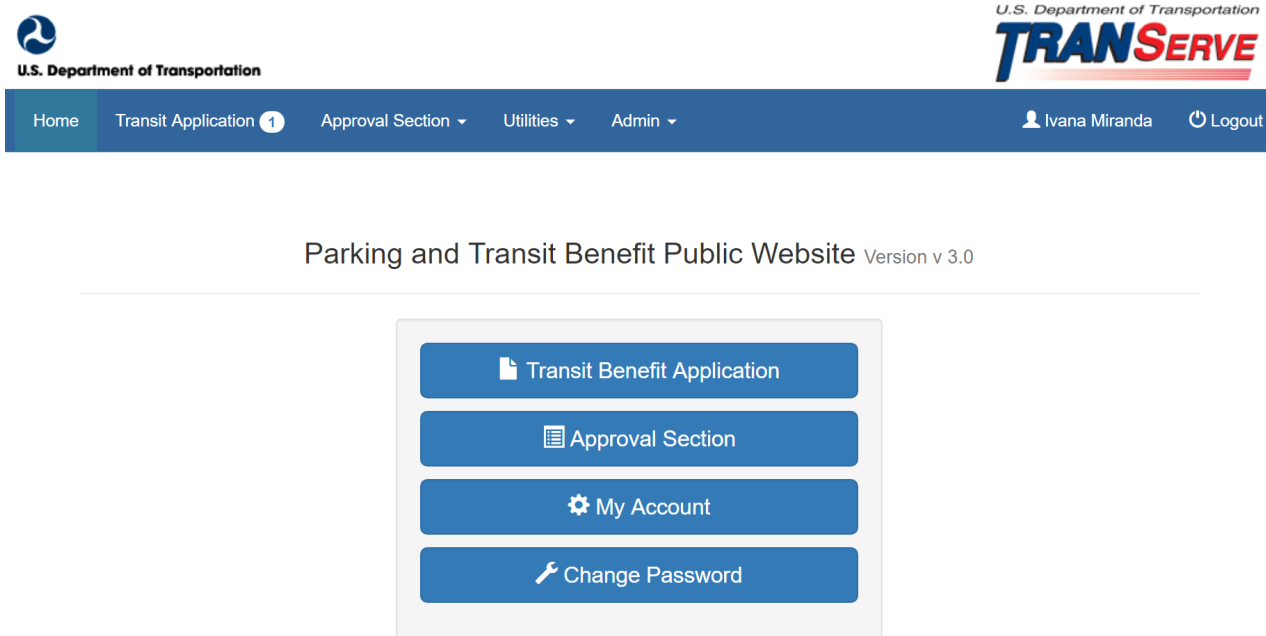
An example of the automated email from the DOT/TRANServe system.

Step 4. Select "Transit Benefit Application"

The USPTO does not offer a parking subsidy.

Step 5. Select "Certify/Enroll" and continue

Step 6. Review and select "I Agree" to USPTO program certification statements.

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. Patent and Trademark Office or am a volunteer worker with the U.S. Patent and Trademark Office. NOTE: USPTO contractors are NOT eligible.

- 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, 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.

- 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]

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Step 7. Certify/Enroll - Complete Transit Benefit Application Worksheet

* 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"**

    a. Select your transportation method(s)
    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)
         ii. Daily or Monthly Expense
         iii. Number of days you routinely work in a month
    c. If you purchase a Monthly pass, divide the price of the pass by 2, and enter the information in the Monthly Expense column.
    d. The Total Monthly Expense value automatically populates

*Reason for Certification: [▼]

Not Applicable: ❓ [CIVILIAN ▼]

Work Status: [Full Time ▼]

Step 7. Certify/Enroll – Select New Transit Benefit Participant. Check box for training.

*Reason for Certification: New Transit Benefit Participant ▾

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

Not Applicable: ❓

*Reason for Certification: New Transit Benefit Participant ▾

☑ ***I have completed the required Transit Benefit Integrity training for my Agency**

❓

All participants must complete this online training. Watch the recorded video session; you may fast forward through the repeated portions. Pay attention to the details.

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Step 8. Expand to enter daily transportation method to/from work (i.e. Bus, Rail, Vanpool)

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 |

Please select your Transportation Methods

---
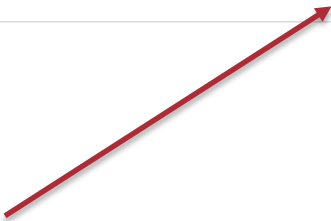
*Select your transportation methods:

| Bus | Other Bus | Rail | Other Method | Vanpool |

| Vanpool: | [Name of Company] | $ [Daily Expense] | [Days per Month] | $ [Monthly Expense] |

Step 9. Complete Expense Worksheet

*Select your transportation methods:

| Bus | Other Bus | Rail | Other Method | Vanpool |

	Name of Company	Daily Expense	Days per Month	Monthly Expense
Bus to Work:	Bus Name	$ 2.25	22	$ 49.50
Bus from Work:	Bus Name	$ 2.25	22	$ 49.50
Rail to Work:	Rail Name/Starting Station	$ 2.25	22	$ 49.50
Rail from Work:	Rail Name/Starting Station	$ 2.25	22	$ 49.50

Note: Key in "<u>WMATA</u>" instead of "*Metro*" for
National Capital Region/ Washington DC Metro area.
All rails need a starting station. Applications without rail stations will be disapproved.

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Step 10. Complete the application – enter USPTO Employee ID number (all fields w/asterisks * are required)

*Employee ID #: ❓ `*****`

Name: MIRANDA IVANA H
(Last) (First) (Middle)

Email Address: Ivana.Miranda@uspto.gov *Work Phone: ❓ `571-272-6503`

Alternate Name: ❓ [ ]

U.S. Patent and Trademark Office

*Select Your Agency: ❓ [USPTO ▾] *Region: ❓ [ALEXANDRIA, VA ▾]

*Business Unit: ❓ [CFO - CHIEF FINANCIAL OFFICER ▾]
Populates from Select Your Agency

Employment Type: ❓ [FEDERAL EMPLOYEE] [Select...]
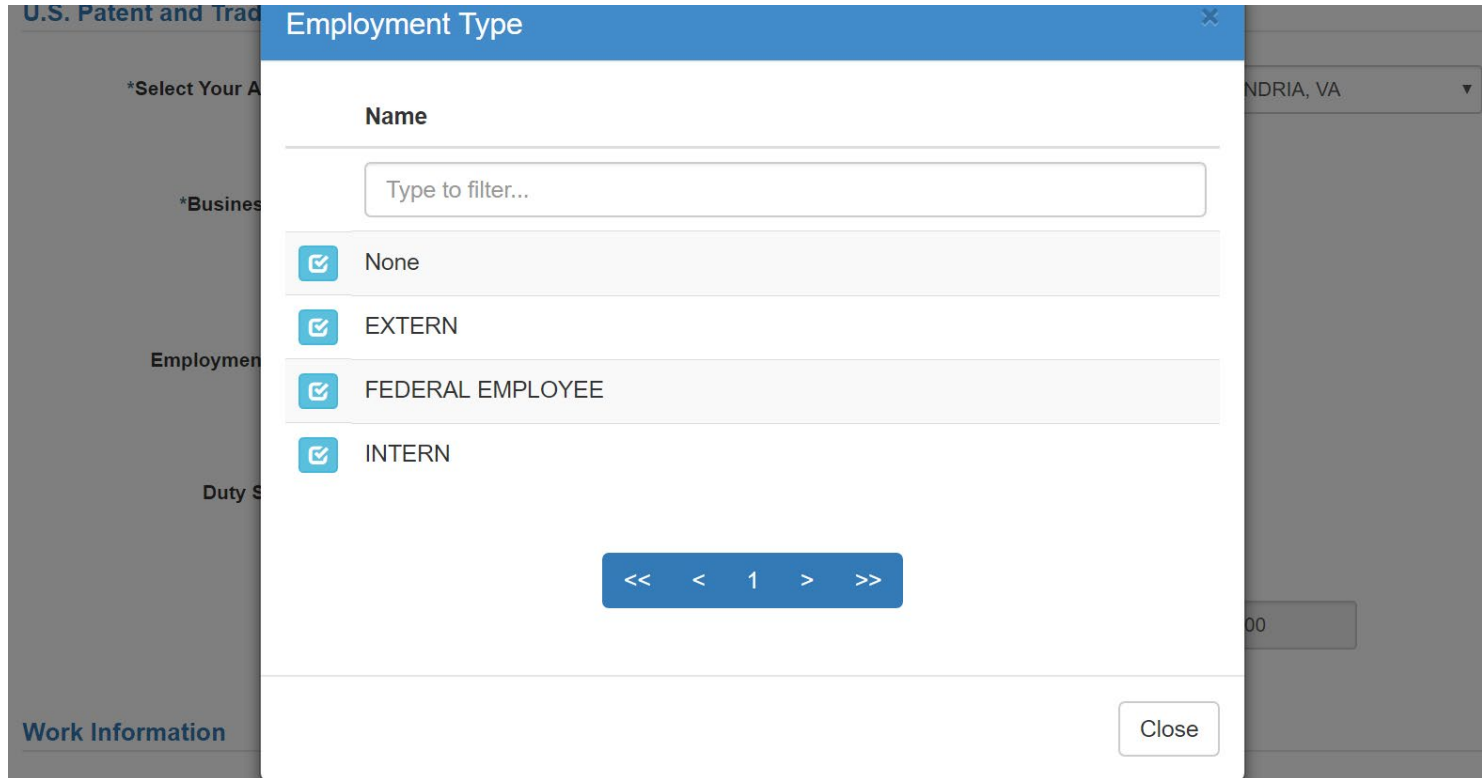Click the Select button to select Employment Type

Duty Station: ❓ [ALEXANDRIA] [Select...]
Click the Select button to select Duty Station

Complete alternate name field

Select Region (based on current official duty location)

*Employee ID #: ❓   `*****`

Name: MIRANDA   IVANA   H
     (Last)   (First)   (Middle)

Email Address: Ivana.Miranda@uspto.gov

*Work Phone: ❓   571-272-6503

Alternate Name: ❓

U.S. Patent and Trademark Office

*Select Your Agency: ❓   USPTO ▼

*Region: ❓   ALEXANDRIA, VA ▼

*Business Unit: ❓   CFO - CHIEF FINANCIAL OFFICER ▼
Populates from Select Your Agency

Employment Type: ❓   FEDERAL EMPLOYEE   [Select...]
Click the Select button to select Employment Type

Duty Station: ❓   ALEXANDRIA   [Select...]
Click the Select button to select Duty Station

Select Employment Type (Federal Employee, Extern/Intern only)

Employment Type

Name

Type to filter...

☑ None

☑ EXTERN

☑ FEDERAL EMPLOYEE

☑ INTERN

<< < 1 > >>

Close

NOTE: Application will be disapproved if "None" is selected.

Select Duty Station (Note: Options are on two pages)

Duty Station ✕

Name

[Type to filter...]

☑ None

☑ ALEXANDRIA

☑ BOYERS

☑ DALLAS

☑ DENVER

`<< < 1 2 > >>`

Close

Duty Station ✕

Name

[Type to filter...]

☑ DETROIT

☑ HOME

☑ SILICON VALLEY - SAN JOSE

`<< < 1 2 > >>`

Close

Step 11. Enter Address for usual commute to/from work

Work Information

*Work Address: 600 Dulany Street

*Work City: Alexandria   ***Work State:** VA ▾   ***Work Zip:** 22314

Residence Information

*Address: LOCAL PHYSICAL ADDRESS

WHERE YOU BEGIN YOUR COMMUTE

*City: ANYTOWN   ***State:** VA ▾   ***Zip:** 22314

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Step 12. Select Point of Contact

Approver Information

*Point of Contact: ❓   [SIMS, LATRICE **Select...**]

Click the Select button to select Point of Contact

Point of Contact   ✕

	Name	Region	Email
☑	LATRICE SIMS	ALEXANDRIA, VA	latrice.sims@uspto.gov
☑	CASSANDRA GARCIA	DALLAS	Cassandra.Garcia@USPTO.GOV
☑	BRETT CONTY	DENVER	brett.conty@USPTO.gov
☑	LORRE DEWITT	DETROIT	TransitSubsidyCoordinator@uspto.gov
☑	TARLISE LOTT	SAN JOSE, CA	TransitSubsidyCoordinator@uspto.gov

[Close]

POC's do not approve applications. They will receive the TRANServe cards in each location. For questions on application approval, please reach out to transitsubsidycoordinator@USPTO.GOV and not your POC.

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Step 13. SmarTrip card users must provide registered card information or enter NA

Enter NA

(No spaces or special characters)

If you are:

- A Regional Office Employee

or

- A commuter who rides
    - VRE
    - Vanpools, Amtrak
    - Metro Access
    - MTA

---

*SmarTrip Card N...

Comment for Agency A...

What number do you need? (USPTO) ✕

SmarTrip cards are limited to WMATA (Metro) enabled commuters in the NCR (Washington, DC-Virginia-Maryland).
If your transportation provider does not accept a SmarTrip card, enter NA.

The card must be registered with WMATA in the EXACT NAME used on the application.
NAMES MUST MATCH on SmarTrip Card and Transit Benefit Application.
Applications will be disapproved for unregistered SmarTrip cards or inaccurate names.

Enter the SmarTrip Card number without dashes or spaces.
See the samples below to identify your card number series, then insert the numbers on the application in the same format that follow =

Example 1: [01670693456479929601]
Example 2: [012345678]
Example 3: [012345678] 3
Example 4: 0020 00[012345678] 1 or [0020000123456781]

*Please note that changing the name on your Smartrip.com account will not update your SmarTrip card registration.

These are two separate features in the WMATA system that do not link.

Changing your SmarTrip card in this system will NOT update your WMATA SmarTrip registration.

nue... Cancel

PRIVACY ACT STATEMENT:

This notice is provided pursuar...
form is voluntary, but failure to...
information are to facilitate time...
*disclosed to the Department of...
and for periodic review or reva...*

Accessibility | Ethics | FOIA | Information
Policies & Notices | WhiteHouse.gov

...hishing the information on this
...principal purposes of the
...lved. *This information may be
...ction of listings and reports
...).*

...ay, August 13, 2018 -

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If your commute requires a split distribution

(SmarTrip card AND credit card, please add Comments for Agency Approvers to tell us:

How much money to assign to your credit card
How much money to assign to your SmarTrip card.

NOTE: The total must match your total commute costs.

*Point of Contact: ❓   SHIRLEY PLUMME   Select...   **Not Applicable:**

Click the Select button to select Point of Contact
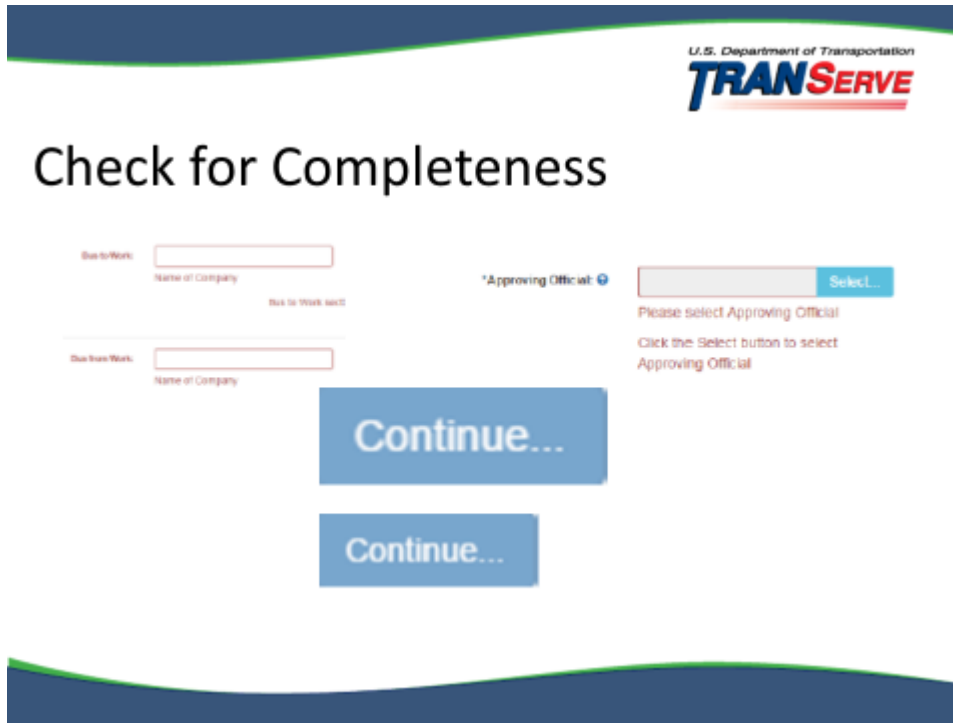
*SmarTrip Card Number: ❓   MY SMARTRIP CARD NO.

Comment for Agency Approvers: ❓   Debit card = $165   SmarTrip card = $100. The total must match your total commute costs.

COMMENTS FOR AGENCY APPROVERS

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Step 14. Check application for accuracy and completeness. Correct errors or select "continue".

Continue = Submit

There is no summary or review page. Selecting continue will submit your application.

Step 15. Select YES or NO for SmartBenefits Program

- If you need funds on your SmarTrip card, select YES, I would like to enroll (in SmartBenefits Program)

- If you do not want funds on your SmarTrip card, select NO Thank You.

- If your provider does not accept a SmarTrip card, you should not see this page.

CONGRATULATIONS!!

You have now completed the application process for the USPTO Transit Subsidy Program.

Look for this message. You will not receive an email until the application is approved or disapproved.

NEXT STEPS

❑ Applicants will receive "Application has been submitted" message on the screen. There is <u>NO</u> email for submitting an application.

❑ Applicants will receive a confirmation e-mail when the application is <u>approved</u> or if <u>disapproved</u>

  ▪ Explanation of disapproval is provided

Application Status:

If your application is disapproved, see the Reason.

- Select Update Disapproved Certification to correct the application.

- If you do not understand the Reason, you may Request Information; or email transitsubsidycoordinator@USPTO.GOV.

Your Current Application Status: **Certification Disapproved (08/14/2018)**
Reason: Testing 123

Select an Action to Continue

Employer: U.S. Patent and Trademark Office

◉ Request Information ❓

◯ Update Disapproved Certification ❓

Continue

Update Disapproved Certification: Prior to contacting the Transit Subsidy Coordinator, see Disapproved Reason (top and bottom of app). Either continue with pre-populated data and update accordingly or select Delete Application and Start Over.

DISTRIBUTION OF BENEFITS

➢ For SmarTrip card commuters: Benefits will load on the first day of each month.

➢ For debit card commuters: Benefits will load on the 10th of each previous calendar month for advance ticket purchases.
  ➢ i.e. March benefits will load February 10th.

Please note: benefits do not roll-over or accumulate.

TRANServe Cards

➢ If you use a TRANServe credit card, it will be sent to the Office of Finance, arriving 7-10 business days after your application has received its final approval by DOT. You will receive an email when the TRANServe Card is available for pickup, with instructions on picking up your card, as well as activating.

Note: As the TRANServe card is a credit card, purchases do not post immediately. It is recommended you use your funds by the 4th of the month to avoid accidentally using the next month's funds.

When do I make changes to my application?

SITUATION	ACTION
Change in hoteling status	Change [commute] Days per Month or Withdraw
Change in # telework days	Change [commute] Days per Month
Transition to monthly parking	Withdraw from Transit program
Fare increases	Modify Daily Expense
Leaving the agency	**Withdraw from Transit program/Return debit card**

NOTE: *When/If the maximum allowable subsidy amount increases, you DO NOT need to change your application unless you also have a change in commuting data. Increases for the maximum allowable subsidy amount is automatic, based on the data provided.*

Thank you for choosing to commute using mass transit.

For USPTO questions about the Transit Subsidy Program or to report a concern and/or claim of non-receipt, please email:

TransitSubsidyCoordinator@USPTO.GOV

For virtual assistance, call:
571-270-5578

Additional information is available on the following sites:

Commuter SharePoint site:

https://usptogov.sharepoint.com/sites/0782646c/SitePages/transit-program-commuters.aspx

Department of Transportation (DOT)/TRANServe site:

https://www.transportation.gov/transerve/faq

PPA Code for Training

ATRAIN-0000-090101

POPA and NTEU 243 bargaining unit employees are permitted one hour of other time for this training.