

U.S. Department of Transportation



Transit Benefit Application System Approver Training

updated August 18, 2017

AGENDA

- **Purpose**
- **Approver Role**
- **Application Review Process**
- **The Portal**
- **Features & Benefits**
- **The Demonstration**

TRANServe Web Application

Why are We doing this?

- **Increased efficiency**
- **Eliminates use of paper**
- **Better Internal Controls**
- **User Friendly**

TRANServe Web Application

- **Increase efficiency**
 - **Streamline verification/approval process**
 - **Fewer errors**
 - **Easy to read**

TRANServe Web Application

- **Elimination of paper**
 - **Supports Green Initiatives**
 - **Participant information is more secure**
 - **Application history is stored on secure server**

Personally Identifiable Information

Name

Employee ID

Office Phone

Home Address

Office Address

Supervisor's Name

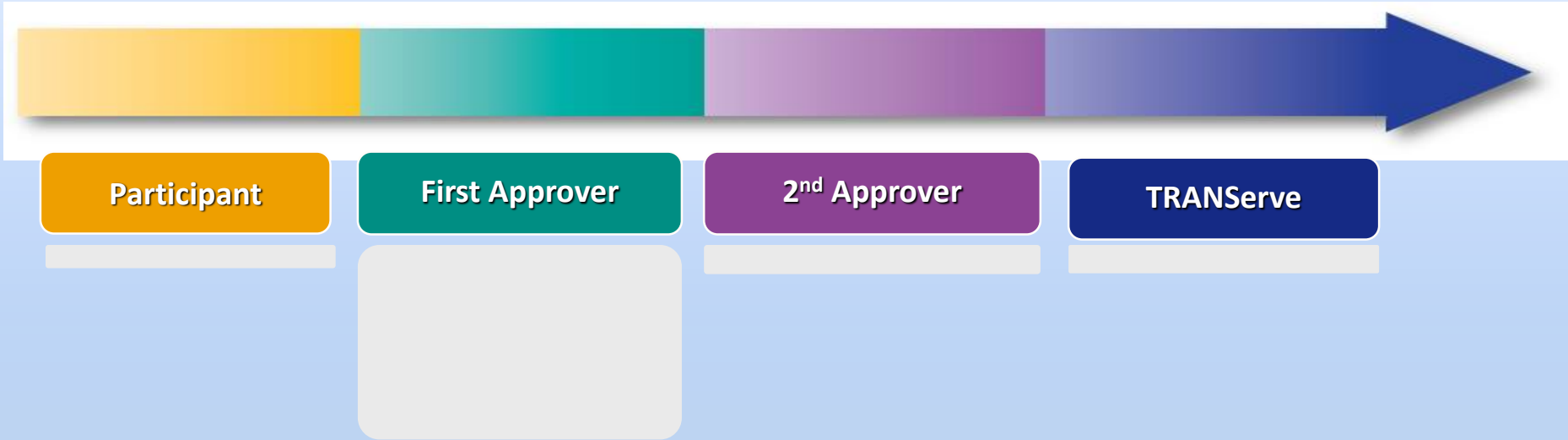
Better Internal Controls

- **Program Management Expertise**
- **Applicant Primarily Responsible**
- **Recoups unused funds**
- **Requires Government email**

User Friendly

- **Application Routing**
 - Faster to apply, withdraw or recertify & get approved
- **Commuting Cost Expense Worksheet**
 - Auto-calculates
 - Dynamic help menus

So, Where do I fit in?



Transit Benefit Application Overview of Major Steps



<https://www.transportation.gov/transerve/>

TRANServe Website – Your Resource



NEWS



PARTICIPATING AGENCIES:
APPLY/RECERTIFY



FAQs



RESOURCES



TRANSIT PROVIDERS



PARTNER WITH
TRANSERVE



[TRANServe Home](#)

[News](#)

[Active Bicycle
Commuting](#)

[Participants](#)

[SafeTrack](#)

[TRANServe Card](#)

[Resources](#)

[Returning Excess Funds](#)

Participants

Federal employees committed to using mass transportation for their home to work to home commute are eligible to receive the federal transit benefit.

TRANServe supports you with simplified access to transit authority information, electronic applications, how-to instructions and other resources that encourage your use of mass transportation as your primary means of commuting from home to work. The transit benefit is a subsidy, not an entitlement. Simply stated, it can go away.

Protect your transit benefit by following a few basic rules:

- Apply using your Agency's established application process
- Spend the transit benefit to make a direct purchase through your transit authority
- Ride mass transportation for the bulk of your own home to work to home commute
- Comply with your Agency's Transit Benefit Program Policy

Always Protect Your Transit Benefit - Any month the amount you receive exceeds the amount you use, you must return the excess funds to your Agency!

Report Waste, Fraud and Abuse to your Agency Point of Contact or Inspector General Hotline

Related Links

- [Apply Now](#)

Contact Us

TRANServe
1200 New Jersey Avenue, SE
Washington, DC 20590
United States
TRANServe@dot.gov

Share



Your Page

- The Presidio Participants Page
 - Enables your employees to self serve
 - Centralizes Program Information
 - Portal to the Web Application...

<https://www.transportation.gov/transerve/participants/Presidio>

[TRANServe Home](#)[News](#)[Active Bicycle
Commuting](#)[Participants](#)[SafeTrack](#)[TRANServe Card](#)[Resources](#)[Returning Excess Funds](#)

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Related Links

- [Apply Now](#)

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1200 New Jersey Avenue, SE
Washington, DC 20590
United States
TRANServe@dot.gov

Share



OPM
Presidio Trust
SBA
SEC
STATE
Treasury - HQ
Treasury - MINT
TRE-TIGTA
US COURTS - BALTIMORE
US DISTRICT COURTS MD
USCG
USDA



How Do I Access the Application System?

Go to: <https://www.transportation.gov/transerve/>

Click: Participating Agencies Apply/Recertify

Select: Presidio Trust

Click: Application System Link



**PARTICIPATING AGENCIES:
APPLY/RECERTIFY**

Step 1: Create An Account

Use your official federal government email address to create a User Account Profile

Complete the Registration Form

Login


***User Name:**

***Password:**

[Log In](#)

[Forgot Password?](#)

Not registered yet? [Register](#)



Click "Register"

The first time in – Complete this simple form

Register Account Information

***User Name:**

Government Email Address

***First Name:**

First Name

Middle Name:

Middle Name

***Last Name:**


Last Name

***Agency/Mode:**

▼

Agency options will show once your Government Email Address has been validated

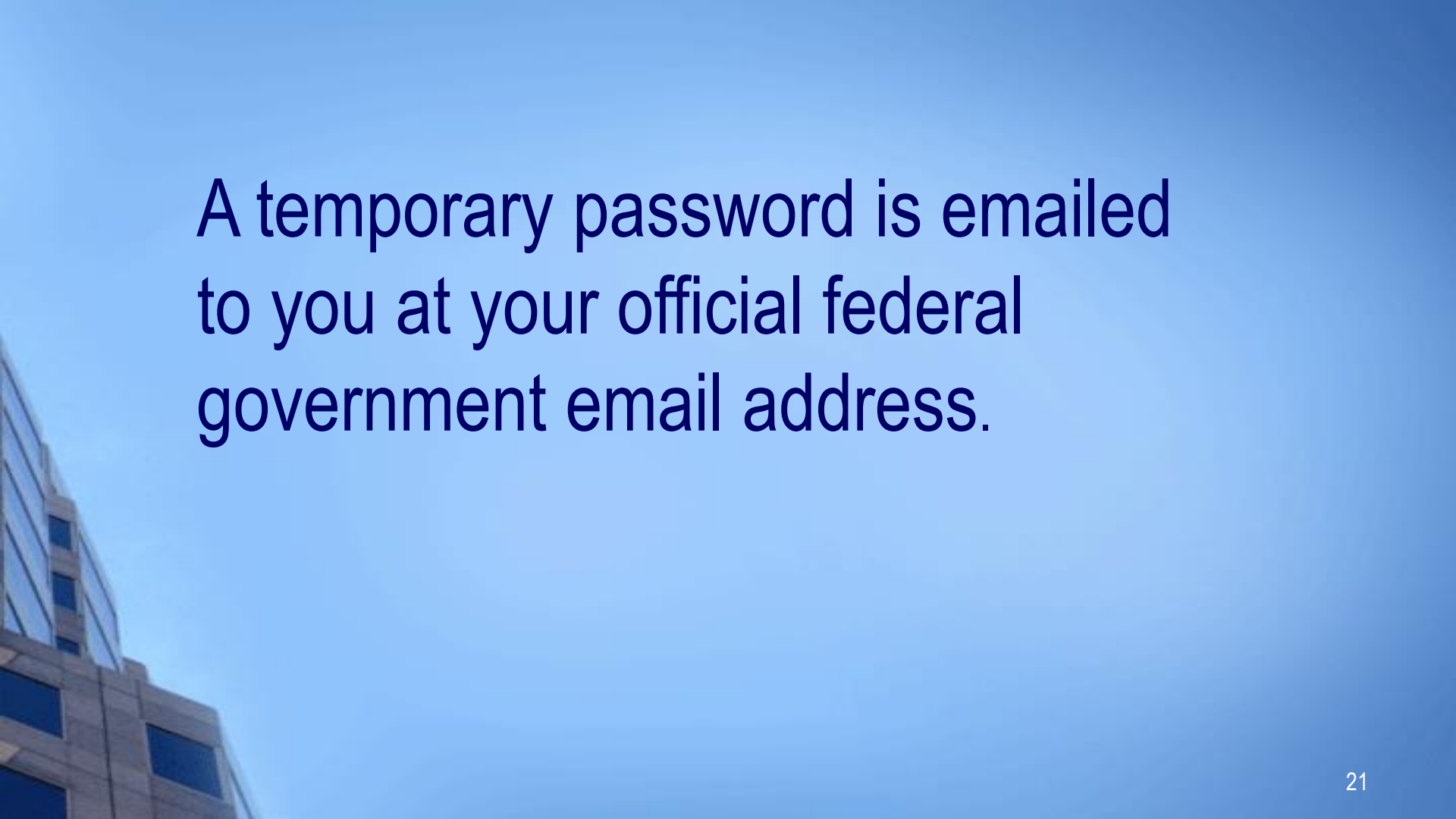
Phone Number:



Register

Reset

Cancel



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

Login

*User Name:

Firstname.Lastname@Agency.gov

*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****

Create a Password

Change Password

***Current Password:**

.....

***Create New Password:**

.....

***Confirm New Password:**

.....

***Create a Hint:**

My favorite time of year |

Log in

Login

*User Name:

Firstname.Lastname@Agency.gov

*Password:

.....

Log In

[Forgot Password?](#)

Not registered yet?

[Register](#)

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

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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****

Update My Account Information

***User Name:**

cheri.johnson@opm.gov

***First Name:**

Cheri

Middle Name:

Middle Name

***Last Name:**

Johnson

***Agency/Mode:**

OPM



Phone Number:

(202) 123-4567

Role:

TRANServe Admin

Home

Transit Application

Approval Section ▾


Utilities ▾

Admin ▾

Parking and Transit Benefit Public Website Version v 3.0


 Transit Benefit Application

 Approval Section

 My Account

 Change Password

Select an Activity

 Transit Benefit Application

 My Account

 Change Password



Home

Transit Application

Approval Section ▾

Utilities ▾

Admin ▾

Pending Approving Official


Pending Manager/Fund Certifier


Pending Program Admin


Approved Records

Disapproved Records

Completed Records

 Transit Benefit Application

 Approval Section

 My Account

 Change Password

[Home](#)[Transit Application](#)[Approval Section ▾](#)[Utilities ▾](#)[Admin ▾](#)[Cheri Johnson](#)[Logout](#)

Pending Transit Application 5

[Approving Official](#)

Mode	Admin	Request Date	Type	Name	
<input type="text" value="Type to filte"/>	<input type="text" value="Type to fi"/>	<input type="text" value="Type to filte"/>	<input type="text" value="Type to"/>	<input type="text" value="Type to filter..."/>	
View	FDIC	DC	04/14/2016	New Transit Benefit Participant	<div>Name</div> <div>Approve Disapprove Delete</div>
View	FEDSOURCE-HQ		12/06/2015	SmartTrip and Rate Change	<div>Name</div> <div>Approve Disapprove Delete</div>
View	FEDSOURCE-HQ	WHITMIRE, TAMMY	04/12/2016	Withdraw from the Program	<div>Name</div> <div>Approve Disapprove Delete</div>
View	TRICARE-REG		01/07/2016	Rate Change	<div>Name</div> <div>Approve Disapprove Delete</div>
View	VA	849TM1	01/07/2016	Agency Change	<div>Name</div> <div>Approve Disapprove Delete</div>

[Home](#)[Transit Application](#)[Approval Section ▾](#)[Utilities ▾](#)[Admin ▾](#)[Approve](#)[Disapprove](#)[Cancel](#)

Reason:

Certify/Enroll (PARKER DUNPHY)

Status: Certification Pending (Approving Official)

Approve

Disapprove

Cancel

Reason:

Correct Supervisor

Certify/Enroll (PARKER DUNPHY)

Status: Certification Pending (Approving Official)

Review Application History

Application History [3924]



Action Date	Action	Action By
03/02/2016 10:39:45AM	Annual Certification/Recertification Request sent to Manager/Fund Certifier	Cheri Johnson
03/02/2016 08:18:45AM	Annual Certification/Recertification Entered	Parker Dunphy

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.

Bus to Work:	MBTA	\$1.00	10	\$10.00
	<i>Name of Company</i>	<i>Daily Expense</i>	<i>Days per Month</i>	<i>Monthly Expense</i>

Bus from Work:	MBTA	\$1.00	10	\$10.00
	<i>Name of Company</i>	<i>Daily Expense</i>	<i>Days per Month</i>	<i>Monthly Expense</i>

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:	\$20.00
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Transit Benefit Program Application

Smart Benefits Program: NO

Identifier: ****

Name: DUNPHY
(Last)

PARKER
(First)

T.
(Middle)

Email Address: parker.dunphy@ssa.gov

Work Phone: (123) 456-7890

Common Identifier: SSA TRANSIT

Work Zip Code: TESTING

SSA

Select Your Agency: SSA

*Region:

BOSTON

*Admin:

ABOV, YEMIMA

Accounting Code:

Select...

Click the Select button to select Accounting Code

Routing Symbol:

Select...

Click the Select button to select Routing Symbol

Location/Building:

BOSTON

Select...

Click the Select button to select Location/Building

I certify that my usual **monthly Transit commuting costs** are: **\$237.2**

Work Information

Work Address: 1234 Ocean Parkway

Work City: Oklahoma City

Work State: OK

Work Zip: 12345

Residence Information

Address: 98765 Beech Drive

City: Suburban

State: OK

Zip: 12347

Approver Information

Approving Official:

Name

Manager/Fund Certifier:

Name

Point of Contact:

Name

Manager Phone:

123-456-7890

SmartTrip Card Number:

NA

Comment for Agency Approvers:

Where do I enter my Parking Fees?



Approve

Disapprove

Cancel

Reason:

Approve

Disapprove

Cancel

Delete

Approval Section ▾

Utilities ▾

Pending Approving Official

Pending Manager/Fund Certifier

Pending Program Admin

Approved Records

Disapproved Records

Completed Records

Home

Transit Application

Approval Section ▾

Utilities ▾

Admin ▾

Cheri Johnson



Find Completed Applications

First Name:

Last Name:

Agency/Mode:

*NOTE: Leave all fields blank to Find all Completed Applications.

Enter any portion of your desired search criteria. The system will search for all entries that begin with the entered values.

Search

Cancel

Pending Transit Application **576****Completed**

Mode	Admin	Request Date	Type	Name	
<div>Type to filter..</div>	<div>Type to filter...</div>	<div>Type to filter...</div>	<div>Type to filter...</div>	<div>Type to filter...</div>	
<div><div><div></div><div>View</div></div></div>	ARCHIVES	508TM1	01/28/2013	Monthly Certification	GUILLERMO BRAMHALL
<div><div><div></div><div>View</div></div></div>	ARCHIVES	542 - 1400 BLACKHORSE HILL RD,	01/28/2013	Monthly Certification	PATTIE BRUDNICKI
<div><div><div></div><div>View</div></div></div>	ARCHIVES	508TM1	08/27/2013	Monthly Certification	GUILLERMO BRAMHALL
<div><div><div></div><div>View</div></div></div>	ARCHIVES		10/21/2013	Rate Change	IZAIA RANCH
<div><div><div></div><div>View</div></div></div>	ARCHIVES	ARCHIVES	09/08/2014	12345	GORDON LEXUS
<div><div><div></div><div>View</div></div></div>	ARCHIVES	ARCHIVES	09/08/2014	12345	GORDON LEXUS
<div><div><div></div><div>View</div></div></div>	ARCHIVES	ARCHIVES	09/30/2014	New Transit Benefit Participant	TOM PETTYWORTH

 Transit Benefit Application

 Approval Section

 My Account

 Change Password

SUPERVISOR Proxy

(not selected)

Add >>

(selected)

<< Remove

Users who have you as proxy: N/A

MANAGER Proxy

(not selected)

Add >>

(selected)

<< Remove

Users who have you as proxy: N/A

Update

Reset

Cancel

For Recertification, other application changes, User Guides & this Training always refer to the TRANServe website



**PARTICIPATING AGENCIES:
APPLY/RECERTIFY**

<https://www.transportation.gov/transerve>

It's Time For You To Register !

1. Open a browser
2. Go to: <https://www.transportation.gov/transerve>
3. Click: [PARTICIPATING AGENCIES: APPLY/RECERTIFY](#)
4. Scroll down to “Presidio Trust”
5. Click : Presidio Transit Benefit Program Enrollment/Change Application
6. Click” Register

Do you have Questions?

First Consult the Approver's Guide on TRANServe.dot.gov

If you still need help, email your Transit Benefit Coordinator
or your DOT TRANServe Transit Benefit Manager

Thank You

