



**TRANSIT BENEFIT PROGRAM**  
**APPLICATION SYSTEM**  
**APPLICANT**  
**USER GUIDE**

Submitted by

**TRANServe**

A division of the

**Office of Financial Management and Transit Benefit Programs**

**Office of the Secretary of Transportation**

**U.S. Department of Transportation**

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# 1. OVERVIEW

## 1.1 Background

The Department of Transportation, Transportation Services Division (TRANServe), administers the Transit Benefit Program for DOT and as Service Provider to other federal agencies, nation-wide. The Office currently supports federal agencies and sub-agencies, providing timely and efficient transit benefit program services to customers who will use TRANServe's Transit Benefit Application System. Services include purchasing and distributing mass transit fare media.

TRANServe's Electronic Application System serves as the publicly accessible interface for managing Transit Benefit Program Applications. The current application system is available on-line through the internet and is optimized for desktop and mobile devices. Federal government employees can apply for the transit benefit, request information, withdraw from the program and recertify. Agency Program Offices and Approvers are able to view, update, approve, or disapprove applications using the System.

## 1.2 Purpose

The Transit Benefit Application System user guide is designed to provide written instruction on how to use the application effectively and efficiently. Screenshots serve as examples. Field labels may not be Agency specific.

## 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 Contact

The table below provides a list of contact for additional information regarding the Transit Benefit Application process.

Role	Name/Phone	Title	Email
Office of Administration Region 10 - Seattle	Janice King-Dunbar	Regional Support Manager	Janice.l.king-dunbar@hud.gov
Local Program Coordinator	Janice King-Dunbar	Regional Support Manager	Janice.l.king-dunbar@hud.gov
Back-up Program Coordinator	Thomas Bussiere	Administrative Officer	Thomas.P.Bussiere@hud.gov

## 2. ACCESSING THE TRANSIT BENEFIT APPLICATION

### 2.1 Login Screen

Use the following steps to access the application:

- a. Enter the URL: <http://transitapp.ost.dot.gov> . The Transit Benefit Application System home page is displayed.

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

First time users must register. Use the following steps:

- b. Click the **Register** button. The Register Account Information page is displayed.

**Figure 2: Register Account Information page**

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

- c. Enter your official government email address in the User Name textbox.
- d. Complete the registration form.

Register Account Information

User Name: kimberly.j.gravestest@va.gov

First Name: Kimberly

Middle Name: J

Last Name: Graves

Agency/Mode: VA

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

Phone Number: (000) 000-0000

Register Reset Cancel

**Figure 3: Completed Registration page**

**Note:** The agency domain name used in the email for the username will determine the agency choices displayed in the Agency dropdown list.

- e. Click the **Register** button.
- f. 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 user has registered, an email is sent containing a temporary password. Use the temporary password to log into the application using the following steps:

- g. Enter your official government email address in the User Name textbox.
- h. Enter the temporary password in the Password textbox.

Login

User Name: kimberly.j.gravestest@va.gov

Password: \*\*\*\*\*

Log In

Forgot Password?

Not registered yet?

\*\*\*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 the 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 transmitted this network or stored in this information system.

\*\*\*WARNING\*\*\*WARNING\*\*\*WARNING\*\*\*

**Figure 5: Log In page**

- i. Click the **Log In** button.
- j. The Change Password page displays. Registered

## 2.2 Change Password

After logging into the application for the first time, you are required to change the password to something that you will easily remember.

1. Enter the temporary password in the Current Password textbox.

**Figure 6: Change Password page**

- a. Enter your new password in the Create New Password textbox.
- b. Minimum 12 characters
- c. Complexity: minimum of 1 uppercase, 1 lowercase, 1 number, 1 special character
- d. Reenter your new password in the Reenter New Password textbox.
- e. Enter a hint to remind you of your password in the Create a Hint textbox.
- f. Click the **Submit** button.

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

The confirmation message is displayed at the top of the Login page.



**Figure 7: Change Password Confirmation**

**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.

**Note:** The Password Expired label is only displayed when the password needs to be changed.

**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 8: Utilities Menu Options**

## 2.3 Password Recovery

Use the following steps to recover your password.

1. From the Login page; click the [Forgot Password?](#) link. The Forgot Password page displays.

**Figure 9: Forgot Password page**

- a. The Show Hint section allows the user to view the Hint entered when the password was last 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.

**Figure 10: Show Hint**

- b. Send It By Email allows the user to retrieve a temporary password through email. The password is sent to the email address entered when the account was created. Enter your username and click the **Submit** button.

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

- ♦ 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.

1. From the Home page; click the **My Account** button. The Update My Account Information page displays.

Update My Account Information

User Name: kimberly.j.gravestest@va.gov

First Name: Kimberly Middle Name: J Last Name: Graves

Agency: VA  
Agency names will show once your Government Email Address has been validated

Phone Number: 502-555-4533

Buttons: Update, Cancel, Apply

**Figure 11: Update My Account page**

The information entered when the account was registered is pre-populated in the fields. Update the information as needed.

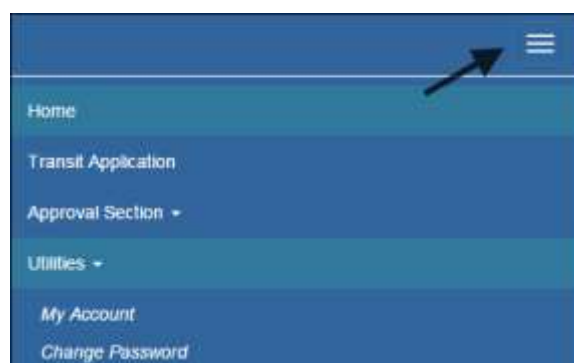
- a. Click the **Update** button to save the changes. The account information is updated and the Home page is displayed with a confirmation message at the top of the page.

User kimberly.j.gravestest@va.gov has been Updated

**Figure 12: Update My Account Confirmation**

**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 13: 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

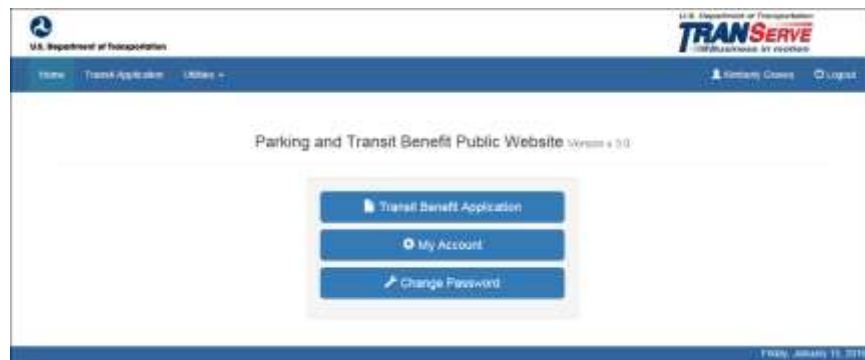
- To exit the system from a desktop, click the **Logout** button on the home page.
- To exit the system from a mobile device, click the additional menu button  at the top of page. Click the Logout button. The Login page is displayed.

### 3. OVERVIEW OF THE HOME PAGE

The tabs and links available to you on the home page are determined by your assigned user role. User roles are assigned by TRANServe and the Agency Program Office.

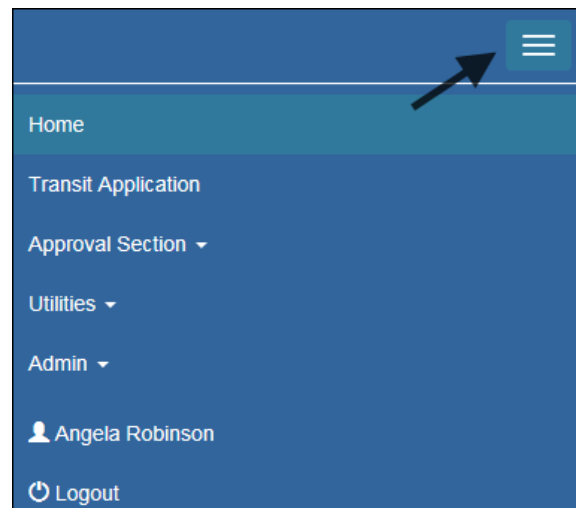
The home page is divided into two sections:

- The menu bar displays at the top of the page and displays the following:
  - ♦ Home – Click this tab to display the home page.
  - ♦ Transit Benefit 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.
  - ♦ Admin – This functionality is only available for administrators. Click this tab to display User Admin and/or Role Admin 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.
  - ♦ My Account – Click this button to display the My Account page.
  - ♦ Change Password – Click this button to display the Change Password page.
  - ♦ Log Out – Click this link to log out of the application system.



**Figure 14: 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. Applicants do not see all sections

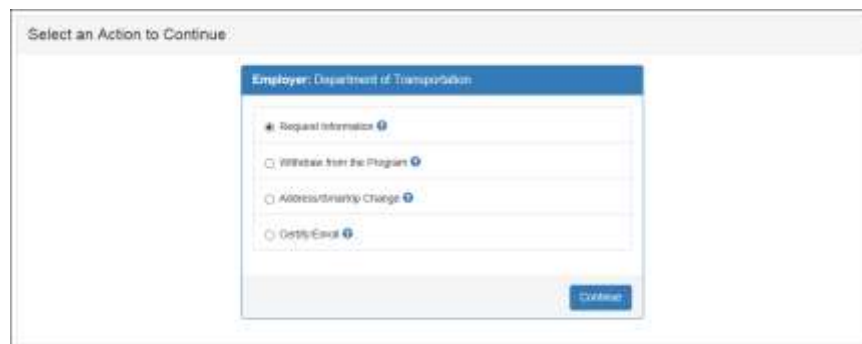


**Figure 15: Additional Menu Options**

## 3.1 Transit Benefit Application

The Transit Benefit Application option allows the applicant to request information, withdraw from the program, make address and SmarTrip® changes, and to certify/enroll in the transit benefit program.

1. From the Home page; click the **Transit Benefit Application** button. The Select An Action To Continue page displays.



**Figure 16: Select An Action To Continue page**

### 3.1.1 Request Information

The applicant can request information from the Program Office by submitting questions regarding the transit benefit program or a submitted application through the Point of Contact (POC).

1. The Request Information radio button is selected by default when the page is displayed. Click the **Continue** button to display the Request Information page.

**Request Information**

**Name:** Last: [text] First: [text] Middle: [text]

**Email Address:** [text] (e.g., j.groves@dot.gov)

**Agency:** [text] (e.g., Department of Transportation)

**Point of Contact:** [text] **Select**

Click the Select button to select Point of Contact.

**Question:** [text area]

**Send Request** **Cancel**

**Figure 17: Request Information page**

- If a POC has been selected it will pre-populate in the Point of Contact textbox. To select a POC, click the **Select** button to display the available POCs in a separate window.
- Select a POC from the list.
- Enter the question or concern in the Question textbox and click the **Send Request** button.
- An email is sent to the selected POC. The Home page is displayed with a confirmation message at the top of the page.

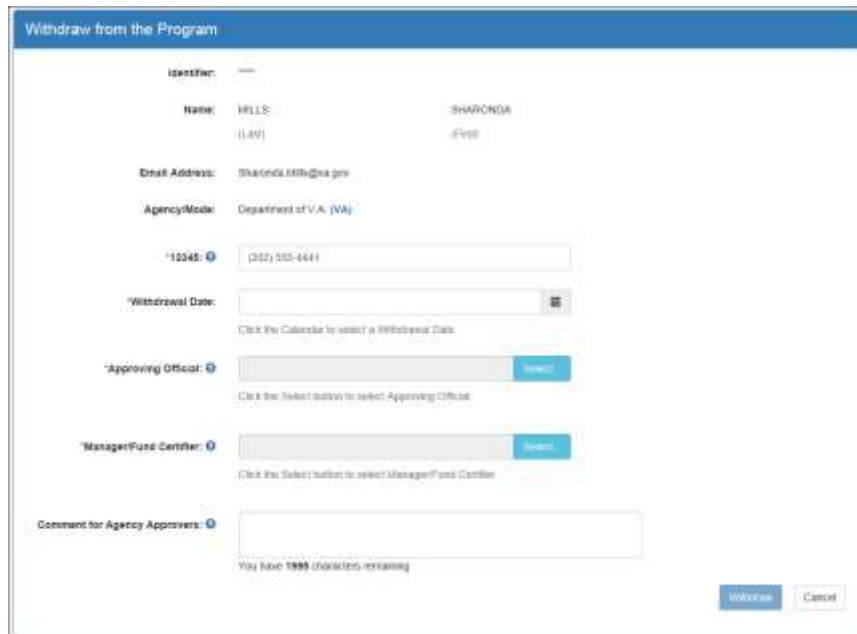
Thank you, your request has been sent.

**Figure 18: Request Information Confirmation**

### 3.1.2 Withdraw from the Program

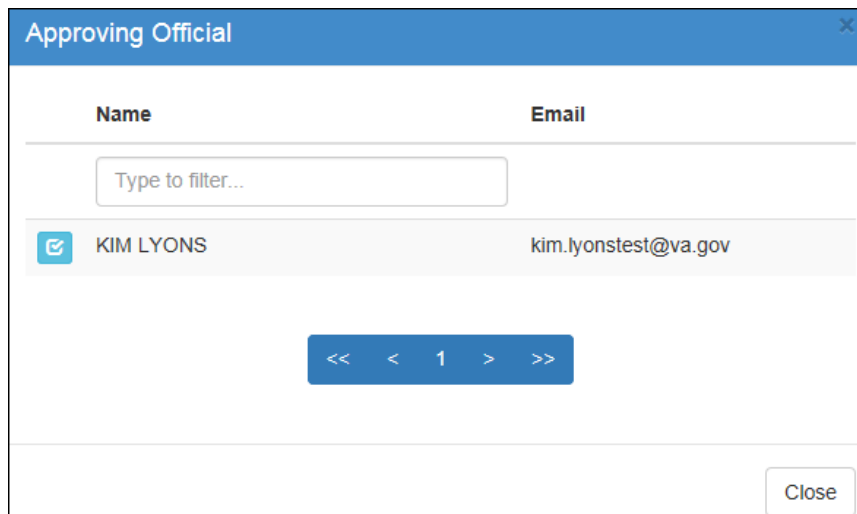
The applicant can submit a request to withdraw from the program at any time.

1. Select the Withdraw from the Program radio button.
  - e. Click the **Continue** button. The Withdraw From The Program page is displayed.



**Figure 19: Withdraw From The Program page**

- f. Click the pop up calendar to select a withdrawal date.
    - g. Click the **Select** button to display the list for your agency's Local Coordinator



**Figure 20: Approving Official (1<sup>st</sup> Approver)**

- h. Select your Approving Official (Local Coordinator).

The screenshot shows a window titled "Manager/Fund Certifier" with a close button (X) in the top right corner. Below the title bar, there are two columns: "Name" and "Email". A search bar with the placeholder text "Type to filter..." is positioned below the column headers. Below the search bar, there is a list of two users, each with a checkbox icon to its left:

Name	Email
GLEN HARPERTTEST	glen.harptest@va.gov
JESSICA MARTIN	jessica.martins@va.gov

Below the list, there are pagination controls: "<< < 1 > >>". A "Close" button is located in the bottom right corner of the window.

**Figure 21: Manager Fund/Certifier (2<sup>nd</sup> Approver)**

- i. Enter any information that will assist your Agency Approver with processing your application in the Comment for Agency Approvers textbox.
- j. Click the **Withdraw** button. The request is sent to TRANServe and a confirmation message is displayed at the top of the page.

Thank you, your application to Withdraw from the Program has been submitted.

**Figure 22: Withdraw Confirmation**

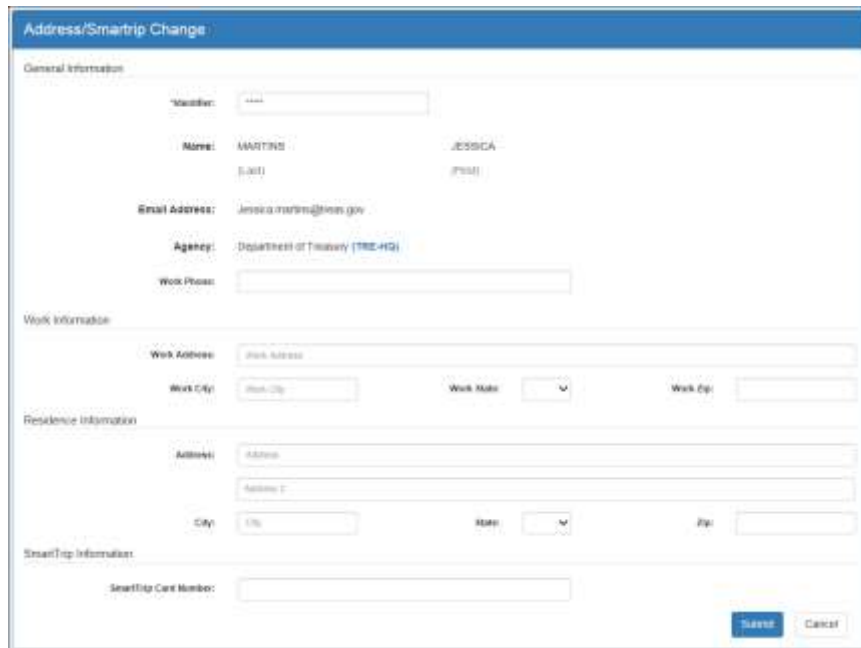
**Note:** The applicant must be enrolled in the Transit Benefit Program to withdraw. Registering a username does not mean that the applicant has enrolled in the program.



### 3.1.3 Address/SmarTrip® Change

The applicant can submit a request to update an address or SmarTrip® number.

1. Select the Address/ SmarTrip® radio button.
  - k. Click the **Continue** button. The Change Address/ SmarTrip® page is displayed.

The screenshot shows a web form titled "Address/Smartrip Change". It is divided into four sections: "General Information", "Work Information", "Residence Information", and "SmarTrip Information".  
- "General Information" includes fields for "Identifier" (with a dropdown arrow), "Name" (split into "First Name" with "JESSICA" and "Last Name" with "MARTINE"), "Email Address" (with "jessica.martine@trans.gov"), "Agency" (with "Department of Treasury (TRE-HQ)"), and "Work Phone".  
- "Work Information" includes "Work Address", "Work City", "Work State" (a dropdown menu), and "Work Zip".  
- "Residence Information" includes "Address" (split into "Address 1" and "Address 2"), "City", "State" (a dropdown menu), and "Zip".  
- "SmarTrip Information" includes "SmarTrip Card Number".  
At the bottom right, there are "Submit" and "Cancel" buttons.

**Figure 23: Change Address/ SmarTrip® page**

- l. Update the applicable information. Only update the section that needs to be changed. You are not required to complete an entirely new application.
- m. Click the **Submit** button. The request is sent to TRANServe and a confirmation message is displayed at the top of the page.

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

**Figure 24: Address/ SmarTrip® Confirmation**

**Note:** The applicant must be enrolled in the Transit Benefit Program to change address/ SmarTrip® information. Registering a username does not mean that the applicant has enrolled in the program.

### 3.1.4 Certify/Enroll

The Certify/Enroll allows the applicant to enroll in the transit benefit program by submitting an application.

1. Select the Certify/Enroll radio button.
  - n. Click the **Continue** button. The Warning page is displayed.

A screenshot of a 'WARNING !' page. At the top, in red, is the word 'WARNING !'. Below it, in small black text, is a disclaimer: '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.' Below this are six lines of certification text, each preceded by a hyphen: '- 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 with 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.', and '- I certify that my parking fees are not included in the computation of the daily, weekly or monthly commuting costs for my transit benefit.' At the bottom right are two buttons: 'I Agree' (highlighted in blue) and 'I Do Not Agree'.

**Figure 25: Warning page**

- o. 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.



- p. Select the reason for certification.
- ♦ Address or SmarTrip® Card Number Change – This selection is only used to make updates to the address or SmarTrip® card number. Do not select this reason if changing transportation amounts. This feature routes the application directly to TRANServe for faster processing.
  - ♦ Agency Change
  - ♦ Annual Certification/Recertification – This selection requires the applicant to certify to completion of the Transit Benefit Integrity Awareness training.
  - ♦ New Transit Benefit Participant – This selection requires the applicant to certify to completion of the Transit Benefit Integrity training.
  - ♦ Rate Change
  - ♦ SmarTrip and Rate Change
  - ♦ Select Employment Type. (This feature default to Civilian)
  - ♦ Select your work status. (This feature defaults to Full Time)
  - ♦ Full Time
  - ♦ Part time
  - ♦ Intern
- q. Select your transportation method(s).
- ♦ Bus

The screenshot shows a form titled 'Bus Method'. It contains two main sections: 'Bus to Work' and 'Other Bus to Work'. Each section has a dropdown for 'Name of Company', a text input for 'Daily Expense', a text input for 'Days per Month', and a text input for 'Monthly Expense'. At the bottom, there is a note: '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.' and a 'Total Monthly Expense' field with a '\$' symbol and a '0.00' value.

**Figure 27: Bus Method**

- ♦ Other Bus

The screenshot shows a form titled 'Other Bus Method'. It contains two main sections: 'Other Bus to Work' and 'Other Bus to Work'. Each section has a dropdown for 'Name of Company', a text input for 'Daily Expense', a text input for 'Days per Month', and a text input for 'Monthly Expense'. At the bottom, there is a note: '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.' and a 'Total Monthly Expense' field with a '\$' symbol and a '0.00' value.

**Figure 28: Other Bus Method**

- ♦ Rail

The screenshot shows a form titled 'Rail Method'. It contains two main sections: 'Rail to Work' and 'Rail from Work'. Each section has a dropdown for 'Name of Company', a text input for 'Daily Expense', a text input for 'Days per Month', and a text input for 'Monthly Expense'. At the bottom, there is a note: '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.' and a 'Total Monthly Expense' field with a '\$' symbol and a '0.00' value.

**Figure 29: Rail Method**

♦ Other Method

**Figure 30: Other Method**

♦ Vanpool

**Figure 31: Vanpool Method**

**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.

**Figure 32: Sample Agency Work Schedule Policies**

- r. Fill out the selected method of transportation table for every method routinely used (i.e. Bus and Rail)

**Figure 33: Method of Transportation Table**

**Note:** The Monthly Expense and the Total Monthly Expense is automatically calculated when you enter the Daily Expense and the Days per Month.

- s. Enter the Identifier. This may be the last four digits of your social security number, your employee identification number or another indicator specified by your Agency. If not sure, you may check the help menu.
- t. Enter the Common Identifier. This is information used to activate the TRANServe Card. The card activation key may be a word phrase or number. If not sure, you may check the help menu.
- u. Select the Region closest to your physical work location
- v. Select the Office Locality.

- w. Depending on the Agency three optional fields may be displayed (i.e. Accounting Code, Routing Symbol, and Location/Building). For HUD REGION 10 these fields are labeled: Local Coordinator and Office of Administration. Click the **Select** link to display the list for your agency.

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

- x. Enter your Work Information.
- y. Enter your Residence Information. (The address from which you routinely commute)
- z. Click the **Select** button to display the list for your agency's 1<sup>st</sup> Approvers (Local Coordinator).

Name	Email
HARRY CAREY	harry.carey@rebas.gov

**Figure 34: 1<sup>st</sup> Approver**

- aa. Select your Local Coordinator (Check the help menu to clarify)
- bb. Click the **Select** button to display the list for your agency's Office of Administration. (Check the help menu to clarify)

Name	Email
DARREN CHANG	darren.chang@ed.gov
HARRY CAREY	harry.carey@rebas.gov

**Figure 35: 2<sup>nd</sup> Approver – Office of Administration**

- cc. Select your Office of Administration.
- dd. Click the **Select** button to display the list for your agency's Points of Contact.

Name	Region	Email
TREASURY POC	DC	POC@Agency.gov

**Figure 36: Points of Contact**

- ee. Select your Point of Contact.
- ff. Enter your SmarTrip® card information. If you have not purchased a SmarTrip®, enter NA. See [Appendix A – SmarTrip® Card Instructions](#). (This information is not applicable to Region 10 Seattle)
- gg. Enter any information that will assist your Agency Approvers with processing your application in the Comment for Agency Approvers textbox.

**Figure 37: Completed Transit Benefit Application**

hh. Click the **Continue** button. The SmartBenefits® Program page is displayed.



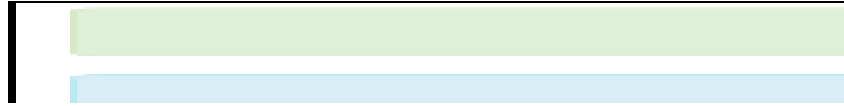
**Figure 38: SmartBenefits® Program page**

- ii. Click the **YES I would like to enroll** button to join the SmartBenefits® program. By clicking yes, you agree to have your transit benefit downloaded to your SmarTrip® card the first of every month. (Mandatory for methods that accept SmarTrip®)
- jj. Click the **NO Thank You** button if you do not want to join the SmartBenefits® program.



**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.

kk. After clicking the **YES** or **NO** button, a confirmation message is displayed.



**Figure 39: Transit Benefit Program Confirmation**

**Note:** The SmartBenefits® program confirmation message is only displayed when the applicant enrolls in the SmartBenefits® program.

### 3.1.5 Disapproved Applications

Disapproved Applications are sent back to the applicant. The applicant must make corrections and resubmit the application to continue the application approval process.

1. 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.

**Figure 40: Select An Action To Continue page**

- II. Select the Update Disapproved Application radio button.
- mm. Click the **Continue** button. The Warning page is displayed.

**Figure 41: Warning page**

**Note:** *If the applicant does not agree, click the **I Do Not Agree** button to return to the Select An Action To Continue page.*

**Figure 42: Disapproved Transit Benefit Application Worksheet**

- ♦ The reason the application was disapproved is displayed at the top of the Transit Benefit Application Worksheet and the Transit Benefit Program Application.
- ♦ The information the applicant entered when the application was submitted is displayed. Make the required 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 revert the application back to the last submitted application. If this is your first application using this system, only the Profile information will display.