

UNITED STATES
PATENT AND TRADEMARK OFFICE



Mandatory Public Transit Subsidy (PTS) Certification Training

FY2019

UNITED STATES
PATENT AND TRADEMARK OFFICE



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

Mass Transportation

- Rail
- Bus
- Ferry
- SkyRide
- Trolley
- Qualified vanpools

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

**TRAN***SERVE*

U.S. Department of Transportation

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.

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
- 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

FY2019

UNITED STATES
PATENT AND TRADEMARK OFFICE



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.
 - a) Complete the Transit Benefit Program Expense Worksheet.

Step 1. Access application system and register

1. Open a browser
2. Go to: www.transportation.gov/transerve
3. Select: PARTICIPATING AGENCIES
4. Scroll down to bottom/Select U.S. Patent & Trademark Office
5. Select: Register
6. Complete: Register Account Information
7. Select: Blue "Register" prompt at bottom of page
8. Check emails/Sign in with system-generated password
9. Select: Transit Benefit Application
10. Select: Certify/Enroll

Step 2. Click “Register” and complete registration account information form



Complete the Registration Form

A screenshot of the top portion of the TRANSSERVE web interface. It shows a "Login" section with fields for "User Name" (containing "Government Email Address") and "Password" (containing "Enter password"). Below these is a blue "Log in" button and a link for "Forgot Password?". To the right of the login section is a "Register" button. A red arrow points down to the "Register" button, and the text "Not registered yet?" is positioned above it.

Click Register

A screenshot of the "Register Account Information" form. The form contains several input fields: "User Name" (with "Government Email Address" pre-filled), "First Name", "Middle Name", "Last Name", "Agency Mode" (a dropdown menu), and "Phone Number". Below the "Agency Mode" field is a note: "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). A red arrow points to the "Register" button.

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

Step 3. Wait for temporary password to Login to DOT TranServe System

U.S. Department of Transportation
TRANSERVE

Login

*User Name:

*Password:

[Forgot Password?](#)

Not registered yet?

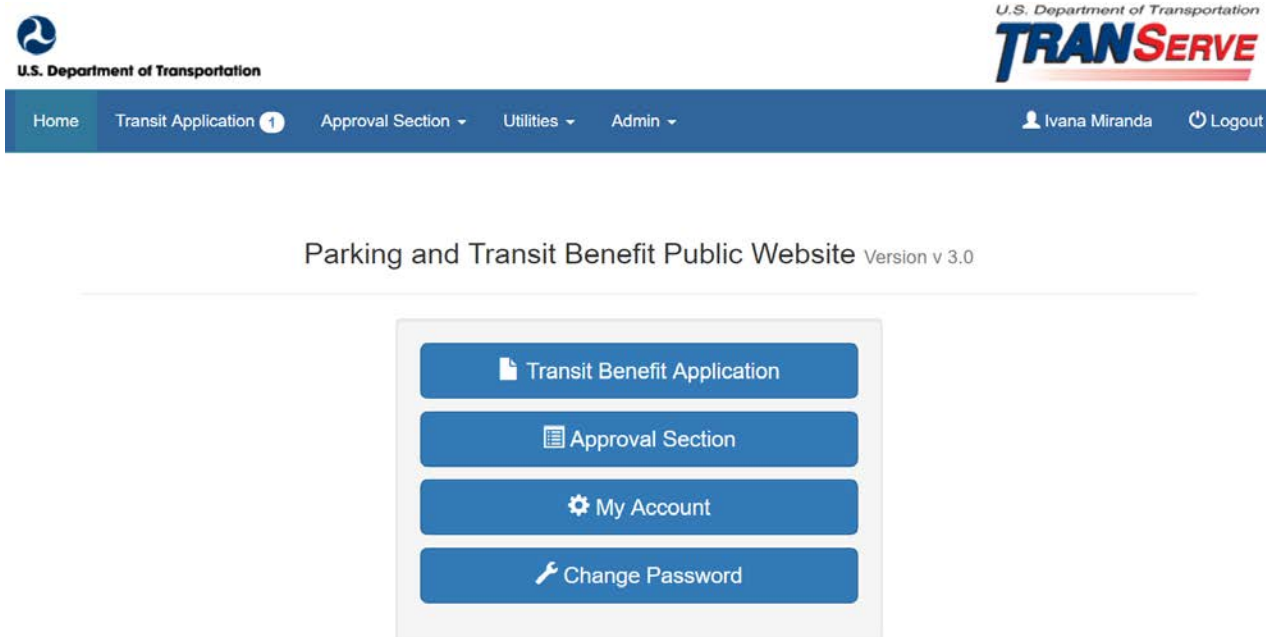
WARNING WARNING WARNING

You are accessing a U.S. Government information system, which includes this computer, the computer network to 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

Step 4. Select “Transit Benefit Application”



The USPTO does not offer a parking subsidy. Contact **Compensation and Benefits** for Parking Reimbursement Account (PRA) info. **571-272-6209**.



Step 5. Select "Certify/Enroll" and continue



U.S. Department of Transportation



Home

Transit Application

Approval Section ▾

Utilities ▾

Admin ▾

Ivana Miranda

Logout

Select an Action to Continue

Employer: U.S. Patent and Trademark Office

☐ Request Information

☐ Withdraw from the Program

☐ Address/Smartrip Change

☒ Certify/Enroll

Continue

uspto

Step 6. 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.
- 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

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 required training.

Step 8. Expand to enter daily transportation method to/from work (e.g. 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

Bus to Work:

Bus Name

Name of Company

\$

2.25

Daily Expense

22

Days per Month

\$

49.50

Monthly Expense

Bus from Work:

Bus Name

Name of Company

\$

2.25

Daily Expense

22

Days per Month

\$

49.50

Monthly Expense

Rail to Work:

Rail Name/Starting Station

Name of Company

\$

2.25

Daily Expense

22

Days per Month

\$

49.50

Monthly Expense

Rail from Work:

Rail Name/Starting Station

Name of Company

\$

2.25

Daily Expense

22

Days per Month

\$

49.50

Monthly Expense

Note: Key in "WMATA" instead of "*Metro*" for National Capital Region/ Washington DC Metro area.
All rails need a starting station.

uspto

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

*Employee ID #: ?

Name:

MIRANDA
(Last)

IVANA
(First)

H
(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

uspto

Complete alternate name field

*Employee ID #: [REDACTED]

Email: [REDACTED] -6503

Alternate: [REDACTED]

What do I enter here? (USPTO)

If your ID badge, Employee locator and email address don't match please enter alternate names here.

Close

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 Region (based on current official duty location)

*Employee ID #: [REDACTED]

Email: [REDACTED] -6503

Alternate: [REDACTED]

What do I enter here? (USPTO)

This applies to your work location.

All Shirlington, Va employees choose Arlington as your region

Close

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)

The screenshot shows a modal dialog box titled "Employment Type" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Name" with a search input field containing the placeholder text "Type to filter...". Below the search field is a list of four options, each with a blue square icon containing a white checkmark:

- None
- EXTERN
- FEDERAL EMPLOYEE
- INTERN

At the bottom of the list is a pagination control with buttons: "<<", "<", "1", ">", and ">>". In the bottom right corner of the dialog is a "Close" button. The background of the application is dimmed, showing parts of a form with labels like "U.S. Patent and Trademark Office", "*Select Your Agency", "*Business", "Employment", "Duty Station", and "Work Information".

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:	<input type="text" value="600 Dulany Street"/>		
*Work City:	<input type="text" value="Alexandria"/>	*Work State:	<input type="text" value="VA"/>
		*Work Zip:	<input type="text" value="22314"/>

Residence Information

*Address:	<input type="text" value="LOCAL PHYSICAL ADDRESS"/>		
	<input type="text" value="WHERE YOU BEGIN YOUR COMMUTE"/>		
*City:	<input type="text" value="ANYTOWN"/>	*State:	<input type="text" value="VA"/>
		*Zip:	<input type="text" value="22314"/>



Step 12. Select Point of Contact

Approver Information

*Point of Contact: ?

PLUMMER, SHIRL Select...

Not Applicable: ?

Click the Select button to select
Point of Contact

Point of Contact



*SmarTrip Card Number: ?

01234567

Comment for Agency Approvers: ?

You have

	Name	Region	Email
<input checked="" type="checkbox"/>	SHIRLEY PLUMMER	ALEXANDRIA, VA	TransitSubsidyCoordinator@uspto.gov
<input checked="" type="checkbox"/>	ROBERTA MUTO-CRILEY	BOYERS, PA	TransitSubsidyCoordinator@uspto.gov
<input checked="" type="checkbox"/>	NEKIWA SMITH	DALLAS	TransitSubsidyCoordinator@uspto.gov
<input checked="" type="checkbox"/>	SANDRA SANCHEZ	DENVER	TransitSubsidyCoordinator@uspto.gov
<input checked="" type="checkbox"/>	LORRE DEWITT	DETROIT	TransitSubsidyCoordinator@uspto.gov
<input checked="" type="checkbox"/>	TARLISE LOTT	SAN JOSE, CA	TransitSubsidyCoordinator@uspto.gov

Close



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

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.

***SmarTrip Card Number**

Comment for Agency Approval

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]

PRIVACY ACT STATEMENT:
This notice is provided pursuant to the Privacy Act. Your participation in this program is voluntary, but failure to provide information are to facilitate timely processing of your request. Information disclosed to the Department of Justice and for periodic review or revocation.

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

Continue... Cancel

By providing the information on this form, you are consenting to the use of this information for the principal purposes of the program. This information may be used for the collection of listings and reports (0).

August 13, 2018 -

Regional Offices enter NA

VRE, Vanpools, Amtrak, & MetroAccess enter NA

uspto

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

U.S. Department of Transportation

TRANSERVE

Check for Completeness

Due to Work:

Name of Company

Back to Work sect

*Approving Official:

Select...

Please select Approving Official

Click the Select button to select Approving Official

Due from Work:

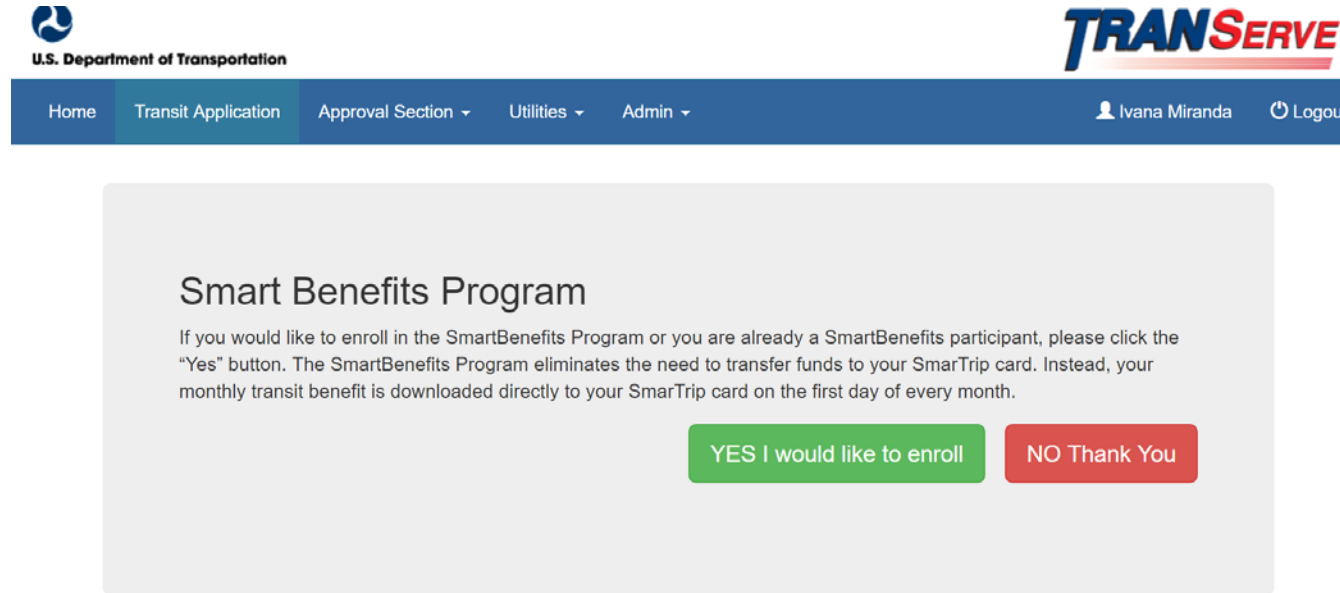
Name of Company

Continue...

Continue...

Step 15. Select YES or NO for SmartBenefits Program

- If your provider accepts a SmarTrip card, select YES, I would like to enroll (in SmartBenefits Program)
- If your provider does not accept a SmarTrip card, select NO Thank You.



The screenshot shows the TRANSERVE web application interface. At the top, there is a header with the U.S. Department of Transportation logo on the left and the TRANSERVE logo on the right. Below the header is a navigation bar with links for Home, Transit Application, Approval Section, Utilities, and Admin. On the right side of the navigation bar, there is a user profile for Ivana Miranda and a Logout button. The main content area is titled "Smart Benefits Program" and contains a paragraph explaining the program: "If you would like to enroll in the SmartBenefits Program or you are already a SmartBenefits participant, please click the 'Yes' button. The SmartBenefits Program eliminates the need to transfer funds to your SmarTrip card. Instead, your monthly transit benefit is downloaded directly to your SmarTrip card on the first day of every month." Below this text are two buttons: a green button labeled "YES I would like to enroll" and a red button labeled "NO Thank You".

U.S. Department of Transportation

TRANSERVE

Home Transit Application Approval Section Utilities Admin

Ivana Miranda Logout


Smart Benefits Program

If you would like to enroll in the SmartBenefits Program or you are already a SmartBenefits participant, please click the "Yes" button. The SmartBenefits Program eliminates the need to transfer funds to your SmarTrip card. Instead, your monthly transit benefit is downloaded directly to your SmarTrip card on the first day of every month.

YES I would like to enroll NO Thank You

CONGRATULATIONS!!

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



U.S. Department of Transportation

U.S. Department of Transportation


TRANSERVE

[Home](#) [Transit Application](#) [Approval Section](#) [Utilities](#) [Admin](#) [Ivana Miranda](#) [Logout](#)

Thank you, your New Transit Benefit Participant Application has been submitted.

Certify/Enroll (IVANA MIRANDA)

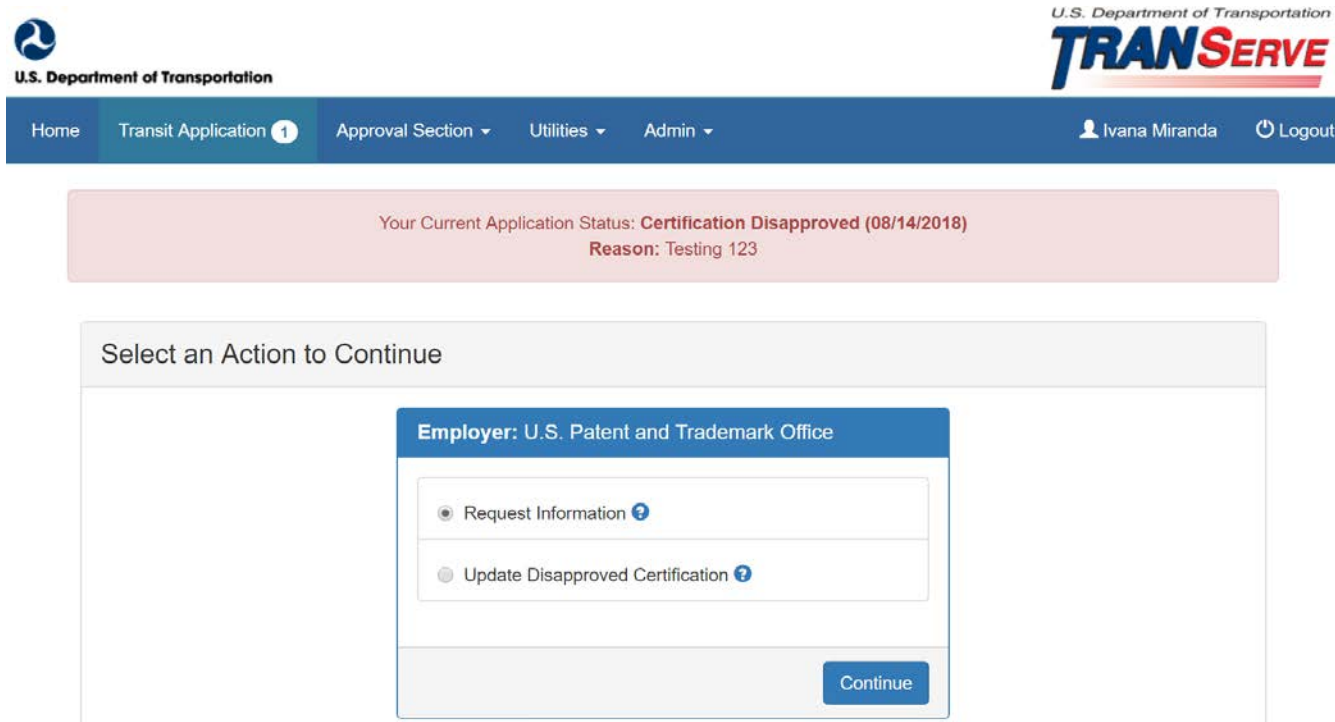
Status: Application Pending (Program Admin - 08/13/2018)

 Transit Benefit Application Worksheet

NEXT STEPS

- ❑ Applicants will receive “Application has been submitted” message on the screen
- ❑ Applicants will receive a confirmation e-mail when application is approved or if disapproved
 - Explanation of disapproval is provided

Application Status: If your application is disapproved, see Reason. Select Update Disapproved Certification or Request Information to contact the TSC for assistance.



The screenshot displays the TRANSERVE web application interface. At the top, the U.S. Department of Transportation logo is on the left, and the TRANSERVE logo is on the right. Below the logos is a navigation bar with links: Home, Transit Application (with a notification badge '1'), Approval Section, Utilities, and Admin. On the right side of the navigation bar, the user's name 'Ivana Miranda' and a 'Logout' button are visible.

A prominent pink message box in the center states: 'Your Current Application Status: **Certification Disapproved (08/14/2018)**
Reason: Testing 123'.

Below this message is a section titled 'Select an Action to Continue'. Inside this section is a blue-bordered box with the header 'Employer: U.S. Patent and Trademark Office'. This box contains two radio button options: 'Request Information' (which is selected) and 'Update Disapproved Certification'. Both options have a small blue question mark icon to their right. A blue 'Continue' button is located at the bottom right of this box.

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.

Delete Application and Start Over

Disapproved Reason: Testing 123

* Indicates required field.

Certify/Enroll

Status: Certification Disapproved ()

🔗 Transit Benefit Application Worksheet

*Select your transportation methods:

Bus

Other Bus

Rail

Other Method

Vanpool

Vanpool:

Lucky Day Vans

Name of Company

\$

11.82

Daily Expense

22

Days per Month

\$

260.00

Monthly Expense

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:

\$

260.00

🔗 Transit Benefit Program Application

Disapproved Reason: Testing 123

The logo for the United States Patent and Trademark Office (USPTO), featuring the lowercase letters "uspto" in a white, sans-serif font inside a light gray rounded rectangle.

DISTRIBUTION OF BENEFITS

- For SmarTrip card commuters: Benefits will load on the first day of each month.
- For debit card commuters: Benefits will load in the previous calendar month for advance ticket purchases. Benefits must be used by the last day of each month.

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

When do I make changes to my application?

SITUATION

Change in hoteling status

Change in # telework days

Transition to monthly parking

Fare increases

ACTION

Change [commute] Days per Month or Withdraw

Change [commute] Days per Month

Withdraw from Transit program

Modify Daily Expense

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:

[Transit Subsidy Coordinator@uspto.gov](mailto: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/Pages/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.

