

SSA TRANSIT BENEFIT PROGRAM TRANSServe WEB APPLICATION: QUICK APPROVER GUIDE

OVERVIEW

There are 3 levels of SSA Approvers: Approver Level 1/Supervisor, Approver Level 2/Manager, Approver Level 3/Regional Transit Coordinator (RTC). **All approvers must register to be added to the web application.**

- Supervisors (Approver 1) and Managers (Approver 2) verify applicants are SSA employees, satisfy eligibility requirements in the SSA Transit Subsidy policy, and provide actual commuting costs based on actual commute days and fares.
- RTCs (Approver 3) review applications for technical correctness, and enter withdraw dates based on the end date of temporary employment or assignments (e.g., Temporary or detailees).

RTCs must be approved by the National Coordinator in order to be granted Program Admin rights in the application system by DOT TRANSServe. Only RTCs and the National Coordinator will have admin rights for elevating Supervisors and Managers from the applicant role to the respective approver role.

Note: All approvers are established in the system as applicants and remain so until elevated to respective roles. However, they do not have to enroll in the transit benefit program; completing the registration steps does not enroll Approvers in the program.

TRAINING

SSA Approvers are required to complete the Integrity and Awareness Training in the SSA LMS before registering to be added to the web application. The training will be completed by approvers annually:

1. Select the SSALMS single sign-on link: <https://sso.ba.ssa.gov/acu/LMS>.
2. Type “TRANSServe” in the advanced search box in the top left hand side of the screen.
3. Select the TRANSServe Applicant and Approver Integrity Awareness Training.
4. Save a pdf copy of the Certificate of Completion:
 - Approvers 1 & 2 provide a copy to your RTC(s)
 - Approvers 3 provide a copy to the National Transit Coordinator

ACCESS THE TRANSIT BENEFIT APPLICATION (Follow these steps to access the application)

1. Open an Internet Browser and enter the URL: www.transportation.gov/transerve
2. Click the *Participants* link and scroll down to select your Agency (SSA)
3. Select *Transit Benefit Program Application System* link

LOG IN AND REGISTRATION (Follow these steps to navigate to the Login/Register page)

1. Enter the URL: <http://transitapp.ost.dot.gov>. The Transit Application login page is displayed.
2. First-time users will need to register. Use the following steps to register a username
3. Click the **Register** button. The Register Account Information page is displayed.
4. Enter your government issued email address in the User Name textbox, this will cause SSA to be displayed in the Agency dropdown list on the application.
5. Complete the registration form.

After approvers register, they will receive an email containing a temporary password. Retrieve the password and go to the Log In page of the Transit Benefit Program Application System using the following steps:

1. Enter the username in the User Name textbox.
2. Enter the retrieved password in the Password textbox.
3. Click the Log In button.
4. The Change Password page displays.

CHANGE PASSWORD (Change the following steps to change your password)

After logging into the application for the first time, it is required that you change the password to something that you will easily remember:

1. Enter the retrieved password in the Current Password textbox.
2. Enter your new password in the Create New Password textbox (**See Note section below**).
3. Reenter your new password in the Confirm New Password textbox.
4. Enter a hint, something that will remind you of your password in the Create a Hint textbox.
5. Click the **Submit** button. Confirmation of the password change displays at the top of the page.

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. You can change your password at any time by using the above steps after clicking the Change Password button on the homepage.

OVERVIEW OF THE TRANServe TRANSIT BENEFIT PUBLIC WEBSITE HOME PAGE

The tabs and links available to you on the PTB Public Website home page are determined by your assigned user role. **The TRANServe Transit Benefit Public Website home page is divided into two sections:**

1. The menu bar displays at the top of the page and displays the following:
 - Home – Click this tab to display the home page.
 - Transit Application – Click this tab to display the Select An Action To Continue page.
 - Approval Section – This functionality is only available for TRANServe Transit Benefit Manager (TBMs), TRANServe Admins, System Administrators and Approving Officials: Supervisors, Managers, and Program Admins. Click this tab to display the available approval levels. Approved Records, Disapproved Records and Completed Records can also be accessed from this tab.**
 - Utilities – Click this tab to display My Account and Change Password sub-menu options.
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- Logout – Click this tab to logout of the application.

2. **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.
 - Approval Section – This functionality is only available for Approving Officials: Supervisors, Managers, and Program Admins. Click this button to display the approval page.**
 - My Account – Click this button to display the Update My Account Information page.
 - Change Password – Click this button to display the Change Password page.
 - Agency Reports – This functionality is only displayed when assigned by an administrator. Click this button to display the Agency Reports page.

APPROVAL SECTION

The Approval Section allows the user to approve or disapprove transit benefit applications and withdrawals. The user must be registered and assigned one of the three approver levels or Program Admin. The number of applications awaiting approval is displayed next to the page title.

Follow these steps to begin the Approval Process; applications will be approved or disapproved by Approvers:

1. Log on as an approver.
2. From the homepage click on **Approver Section** button; the approval page is displayed.
3. Click on the View button to begin reviewing the desired applicant.
4. Select **Approve** to approve the application after review, this will cause the label to change into a green check mark.
5. Select **Disapprove** to disapprove the application. You must enter a reason supported by SSA policy in the reason textbox. Applications should also be disapproved when information is incorrect or missing on the application.

DELETE APPLICATION

1. From the Approval page; click the Delete button. The Delete Confirmation message is displayed at the top of the application page.

Note: Delete should only be selected in limited situations (i.e. applicant changes their mind after submitting the application).

2. Click the Continue button to delete the application. The approval page is re-displayed with the delete confirmation at the top of the page.
3. The submitted application will be deleted and the applicant will need to resubmit the application.

Note: Approvers will be notified by email when an application is first routed to them. Subsequent forms submitted the same day will not prompt email notification. However, the approver will see the number forms pending their review when they first log in. If any forms are pending the next day, the system will generate a reminder the next day. Daily reminders will be emailed until all pending forms are processed (Approved or Disapproved). DOT TRANServe will process forms authorized by SSA within 48 hours of the final approval. It is imperative forms are processed by each approver timely.
