United States Department of Transportation

SSA TRANSIT BENEFIT PROGRAM TRANServe Electronic APPLICATION APPROVER USER GUIDE

Submitted by

TRANServe

A division of the

Office of the Secretary of Transportation

U.S. Department of Transportation

1200 New Jersey Avenue, SE
Washington, DC 20590

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1.   OVERVIEW

1.1   Background

The Department of Transportation, Transportation Services Division (TRANServe), administers the Transit Benefit program. This system will serve as the publicly accessible interface for managing Transit benefits. TRANServe Services include purchasing and distributing transit fare media through the TRANServe Debit Card via Economy Act agreements and the authority of the Administrative Working Capital Fund (49 U.S.C. 327). The office currently supports 276 Agencies and sub-divisions, proving timely and efficient transit benefit service to over 200,000 customers, 60,000 of who use the online Transit Application.

TRANServe has redesigned the current Transit WebApplication into a "new" user friendly, mobile site designed specifically for mobile devices. The mobile version of the WebApplication has been optimized for smaller screens found on mobile phones and tablets. This will allow federal government workers to apply for the transit benefit, request information, withdraw from the program and recertify using a mobile device. Further, TRANServe TBMs, Admins, first, second, and third level approvers will be able to view, update, approve, or disapprove applications from a mobile device from anywhere and at any time.

1.2   Purpose

The Transit Benefit Application user guide is designed to provide written instruction on how to use the application effectively and efficiently.

1.3   Document Organization

The following typographical conventions are used in this user guide:
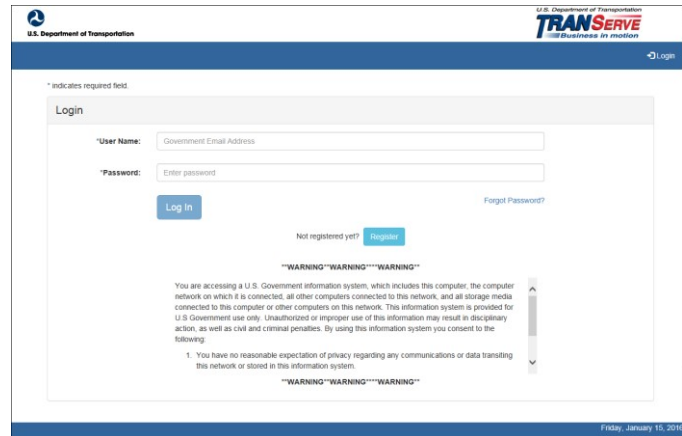- **`Courier New Bold`**   Indicates a button on a page
- *Underline Italic in blue*   Indicates a link within the system
- Title Case plus page   Indicates a name of a page in the application
- *Italic text*   Indicates a note on a page in the application

2. ACCESSING THE TRANSIT APPLICATION

2.1 Login

Use the following steps to access the application:

1. Enter the URL: http://transitapp.ost.dot.gov. The Transit Application login page is displayed.

2. Enter the username in the User Name textbox.

3. Enter the password in the Password textbox.

4. Click the `Log In` button.

Note: * *indicates required field.*

Note: *Approvers must register to be added to the web application. However, they do not have to enroll in the transit benefit program. Approvers complete the Integrity and Awareness Training. Once the user has registered the User Role will be elevated from Applicant to applicable approval level.*

Figure 1: Transit Application Log In page

2.2   My Account

The My Account page allows the user to select a proxy. The functionality to assign a proxy is available for Approving Officials: Supervisors, Managers, and Program Admins.

Use the following steps to select a proxy:

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

Available supervisor and/or managers will be displayed in the Add select box.

2. Select the proxy. Click the **Add** button to add the proxy to the column on the right.

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.

Update My Account Information

*User Name:	christine.golladay@dot.gov

*First Name: Christine   Middle Name: Nari   *Last Name: Golladay

*Agency/Mode: DHS-CIS
DHS-ICE
DOJ-FEDERAL DETENTION
DOT-BTS

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

Phone Number: 202-555-3252

Role: Approval/Supervisor

☑ Allow Access to Agency Reports

Email Agency Report Password

SUPERVISOR Proxy

(not selected)   (selected)

Donavon, Matt (DOT-OST-M1- SE)

Add >>   << Remove

Users who have you as proxy: Matt Donavon

MANAGER Proxy

(not selected)   (selected)

Bellet, Craig (DOT-OST-M1- SE)
Donavon, Matt (DOT-OST-M1- SE)
Mello, Deborah (DOT-OST-M1- SE)
Smith, Kim (DOT-OST-M1- SE)

Add >>   << Remove

Users who have you as proxy: Matt Donavon, Kim Smith

Update   Reset   Cancel

Figure 2: Update My Account Information (Proxy)

To remove a proxy from the column, select the proxy and click the **Remove** button.

(not selected)   (selected)

Donavon, Matt (DOT-OST-M1- SE)

Add >>   << Remove

Figure 3: Selected Proxy

Approvers that have the logged-on user set as their proxy will be displayed below the table.

Note: *If the user has access to the Agency Reports a checked box will be displayed on this page and an Agency Reports button will be displayed on the Home page.*

Note: *You can update your account information at any time by using the above steps after clicking the My Account button on the Home*

MANAGER Proxy

(not selected)   (selected)

Bellet, Craig (DOT-OST-M1- SE)
Donavon, Matt (DOT-OST-M1- SE)
Mello, Deborah (DOT-OST-M1- SE)
Smith, Kim (DOT-OST-M1- SE)

Add >>   << Remove

Users who have you as proxy: Matt Donavon, Kim Smith

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 submenus.*
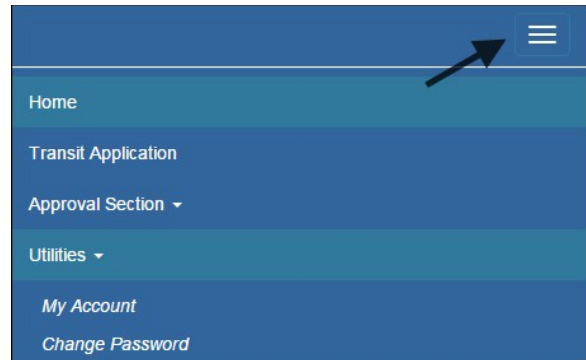

Figure 4: Utilities Menu Options

2.3   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.

2.4   Exit

- To exit the system from a desktop, click the **Logout** button on the PTBW 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 PTB 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. User roles are assigned by the system administrator.

The PTB Public Website 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 Application – Click this tab to display the Select An Action To Continue page.
  - ☐ Approval Section – This functionality is only available for TRANServe 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 Competed Records can also be accessed from this tab.
  - ☐ Utilities – Click this tab to display My Account and Change Password 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.
  - ☐ 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.
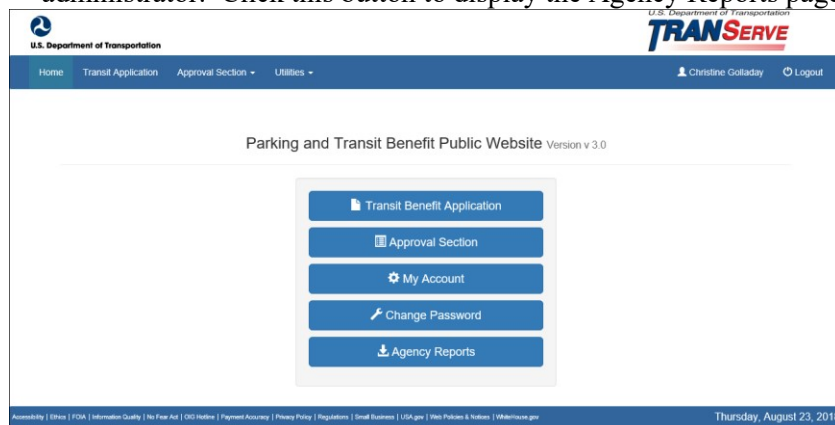

Figure 5: PTB Public Website Home page

4. APPROVAL SECTION

The Approval Section allows the user to approve or disapprove transit benefit applications and withdrawals. The user must be a Supervisor Approval Officer/1st Approver, a Manager/ 2nd Approver, Regional Transit Coordinator/3rd Approver or Program Admin user within the agency that the application is being submitted.

4.1   Approval Process

1. Log on as an approver.
2. From the Home page, click the **Approval Section** button; the approval page is displayed.

Note: *Applications can be reviewed, approved or disapproved on the Transit Benefit Worksheet/Application page by clicking the View button for the desired applicant.*
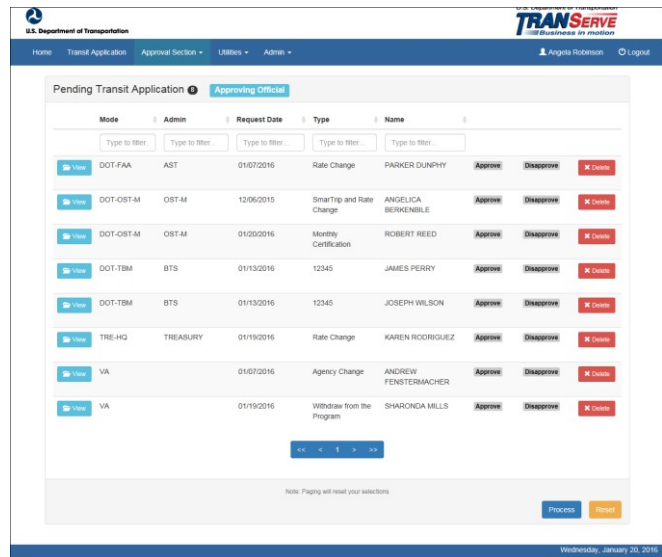
Figure 6: Approval page

The number of applications awaiting approval is displayed next to the page title.

Number of Pending Applications

3. Select **Approve** to approve the application. After the selection is made the label will change into a checkmark.

4. Select **Disapprove** to disapprove the application.

   When an application is disapproved,

   enter a reason supported by SSA policy in the Reason textbox.
   After the selection is made the label will change into a checkmark.

Approve Pending Application

Disapprove Pending Application

The number of selected applications is displayed next to the **Process** button.

5. Click the **Process** button to approve or disapprove the selected *Number of Selected Applications to be Processed* applications.

Note: *Applicants displayed on the active page can be filtered by entering in the first few letters of the Mode, Admin(RTC), Type, and Name. To filter by date, enter in the date benefits were requested in the Request Date filter textbox.*

Note: *Click the arrows next to the column headers to sort applicants in ascending or descending order.*

Note: *To access the additional Approval Section menu options from a mobile device; click the additional menus button at the top of the page. Click the Approval Section dropdown arrow to display the sub-menus.*
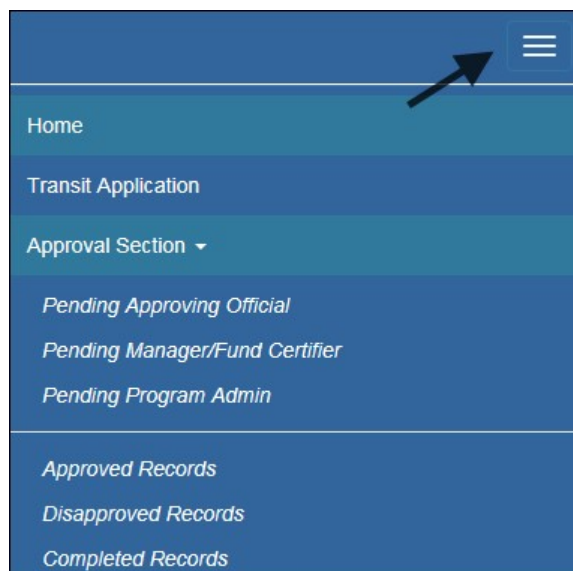
Figure 7: Approval Section Menu Options

4.1.1   Delete Application

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

Figure 8: Delete Confirmation page confirmation at the top

Note: *The submitted application will be deleted and the applicant will need to resubmit the application.*

4.2   Approved/Disapproved/Completed Records

From the Home page; hover over the Approval Section menu option. Select the type of records to be viewed by selecting the link name.

Figure 9: Approved Records

Figure 10: Disapproved Records

When the Completed Records link is selected; the Find Completed Applications page is displayed. Enter a First Name, Last Name, or select an Agency/Mode from the dropdown to limit the search results. Click the **Search** button to return all completed records.

Note: *At least one search criteria field should be entered; if no search criteria are entered the system will retrieve and display all completed records.*

Figure 11: Find Completed Applications page

Figure 12: Completed Records