



**U.S. Comptroller of the Currency**  
**TRANSIT BENEFIT PROGRAM**  
**APPLICATION SYSTEM**  
**APPROVER**  
**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

1200 New Jersey Avenue, SE

Washington, DC 20590

Version 3.0

## TABLE OF CONTENTS

<b>1. OVERVIEW .....</b>	<b>1-1</b>
1.1 Background .....	1-1
1.2 Purpose .....	1-1
1.3 Document Organization .....	1-1
1.4 Points of Contact .....	1-1
<b>2. ACCESSING THE TRANSIT BENEFIT APPLICATION.....</b>	<b>2-1</b>
2.1 Login Screen.....	2-1
2.2 Change Password.....	2-3
2.3 Password Recovery .....	2-4
2.4 My Account.....	2-5
2.5 Session Time Out .....	2-7
2.6 Exit .....	2-7
<b>3. OVERVIEW OF THE HOME PAGE .....</b>	<b>3-1</b>
3.1 Transit Benefit Application .....	3-2
3.1.1 Request Information .....	3-2
3.1.2 Withdraw from the Program .....	3-4
3.1.3 Address/SmarTrip® Change .....	3-6
3.1.4 Certify/Enroll .....	3-7
3.1.5 Disapproved Applications .....	3-14
<b>4. APPROVAL SECTION.....</b>	<b>4-1</b>
4.1 Approval Process.....	4-1
4.1.1 Delete Application .....	4-3
4.2 Approved/Disapproved/Completed Records .....	4-3
<b>5. ADMIN.....</b>	<b>5-1</b>
5.1 User Admin .....	5-1
5.1.1 Add User .....	5-2
5.1.2 Update User .....	5-3
5.1.3 Delete User .....	5-3
5.1.4 Bulk Update View.....	5-4
5.1.4.1 Single User Role Update .....	5-4
5.1.4.2 Multiple User Role Update .....	5-5
5.1.4.3 Role Update Lock .....	5-6
<b>APPENDIX A: SMARTRIP CARD INSTRUCTIONS .....</b>	<b>A-1</b>

## Table of Figures

Figure 1: Transit Benefit Application Log In page	2-1
Figure 2: Register Account Information page	2-1
Figure 3: Completed Registration page	2-2
Figure 4: Registration Confirmation	2-2
Figure 5: Log In page	2-2
Figure 6: Change Password page	2-3
Figure 7: Change Password Confirmation	2-3
Figure 8: Utilities Menu Options	2-4
Figure 9: Forgot Password page	2-4
Figure 10: Show Hint	2-4
Figure 11: Update My Account page	2-5
Figure 12: Update My Account Confirmation	2-5
Figure 14: Update My Account Information (Proxy)	2-6
Figure 15: Selected Proxy	2-6
Figure 13: Utilities Menu Options	2-7
Figure 14: Website Home page	3-1
Figure 15: Additional Menu Options	3-2
Figure 16: Select An Action To Continue page	3-2
Figure 17: Request Information page	3-3
Figure 18: Request Information Confirmation	3-3
Figure 19: Withdraw From The Program page	3-4
Figure 20: Approving Official (1 <sup>st</sup> Approver)	3-4
Figure 21: Manager Fund/Certifier (2 <sup>nd</sup> Approver)	3-5
Figure 22: Withdraw Confirmation	3-5
Figure 23: Change Address/ SmarTrip® page	3-6
Figure 24: Address/ SmarTrip® Confirmation	3-6
Figure 25: Warning page	3-7
Figure 26: Transit Benefit Application Worksheet	3-8
Figure 27: Bus Method	3-9
Figure 28: Other Bus Method	3-9
Figure 29: Rail Method	3-10
Figure 30: Other Method	3-10
Figure 31: Vanpool Method	3-10
Figure 32: Sample Agency Work Schedule Policies	3-10
Figure 33: Method of Transportation Table	3-10
Figure 34: 1 <sup>st</sup> Approver	3-11
Figure 35: 2 <sup>nd</sup> Approver	3-11
Figure 36: Points of Contact	3-12
Figure 37: Completed Transit Benefit Application	3-13

Figure 38: SmartBenefits® Program page	3-13
Figure 39: Transit Benefit Program Confirmation	3-14
Figure 40: Select An Action To Continue page	3-14
Figure 41: Warning page	3-14
Figure 42: Disapproved Transit Benefit Application Worksheet	3-15
Figure 43: Approval page	4-1
Figure 44: Approval Section Menu Options	4-2
Figure 45: Delete Confirmation page	4-3
Figure 46: Approved Records	4-3
Figure 47: Disapproved Records	4-3
Figure 48: Find Completed Applications page	4-4
Figure 49: Completed Records	4-4
Figure 50: Admin Menu Options	5-1
Figure 51: Find Users page	5-1
Figure 52: Users Search Results page	5-2
Figure 53: Add User Account Information page	5-2
Figure 54: Add User Confirmation	5-2
Figure 55: Update User Account Information page	5-3
Figure 56: Update User Confirmation	5-3
Figure 57: Confirm Delete Message	5-3
Figure 58: Delete Confirmation	5-3
Figure 59: Bulk Update View page	5-4
Figure 60: Single Username Select	5-4
Figure 61: Role Change Select	5-4
Figure 62: Role Update	5-4
Figure 63: Confirm Bulk Update Message	5-4
Figure 64: Role Update Confirmation	5-5
Figure 65: Multiple Modes	5-5
Figure 66: Multiple Username Select	5-5
Figure 67: Bulk Role Update Select	5-5
Figure 68: Bulk Role Update	5-5
Figure 69: Confirm Bulk Update Message	5-5
Figure 70: Pending Application Link	5-6
Figure 71: Pending Transit Benefit Application Status page	5-6
Figure 72: Open Application Confirmation Message	5-6

# 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:

- |  |   |
|--|---|
| • <b>Courier New Bold</b>                | Indicates a button on a page                  |
| • <u><i>Underline Italic in blue</i></u> | Indicates a link within the system            |
| • Title Case plus page                   | Indicates a name of a page in the application |
| • <i>Italic text</i>                     | 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.

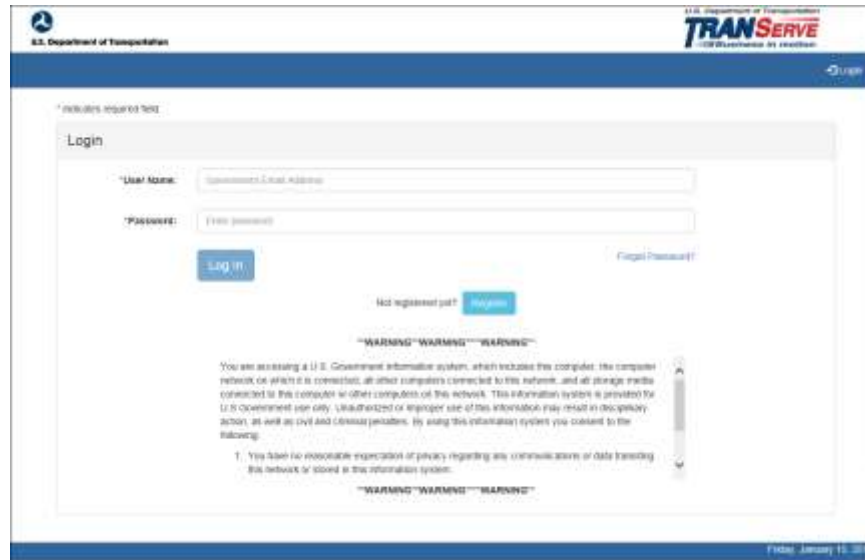
**For Agency specific questions, please contact [Transit@occ.treas.gov](mailto:Transit@occ.treas.gov)**

## 2. ACCESSING THE TRANSIT BENEFIT APPLICATION

### 2.1 Login Screen

Use the following steps to access the application:

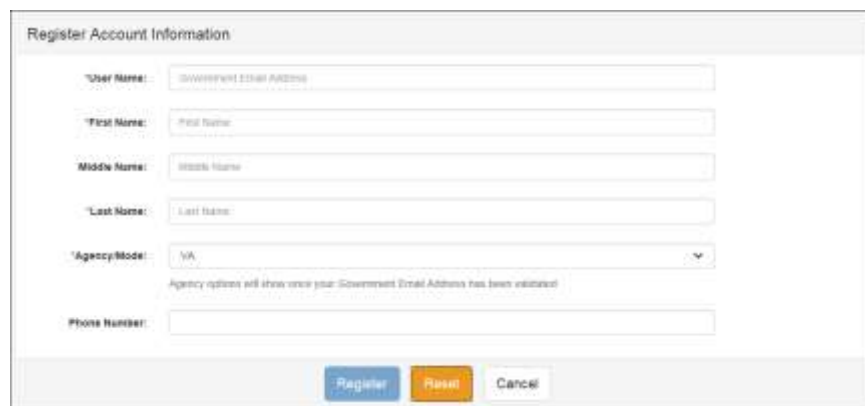
- a. Enter the URL: <http://transitapp.ost.dot.gov> . The Transit Benefit Application System home page is displayed.



**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.

**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.

**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.

**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 and to select a proxy. The functionality to assign a proxy is available for Approving Officials: Supervisors, Managers, and Program Admins.

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: Green

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

Phone Number: (202) 555-4333

Role: Applicant

Update Save Cancel

**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**

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.

Update My Account Information

User Name: christine.gutierrez@dot.gov

First Name: Christine Middle Name: Matt Last Name: Gutierrez

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: 302-555-5555

Role: Approver/Supervisor

☐ Allow Access to Agency Reports

[Don't open a New Window](#)

**SUPERVISOR Proxy**

(not selected) (selected)

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

Add >> << Remove

Users who have you as proxy: Matt Donovan

**MANAGER Proxy**

(not selected) (selected)

Bellef, Garry (DOT-OST-M1- SE)  
Donovan, Matt (DOT-OST-M1- SE)  
Holt, Deborah (DOT-OST-M1- SE)  
Smith, Kim (DOT-OST-M1- SE)

Add >> << Remove

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

[Update](#) [Reset](#) [Cancel](#)

**Figure 13: Update My Account Information (Proxy)**

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.

(not selected) (selected)

Add >> << Remove

**Figure 14: Selected Proxy**

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

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



**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 15: 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

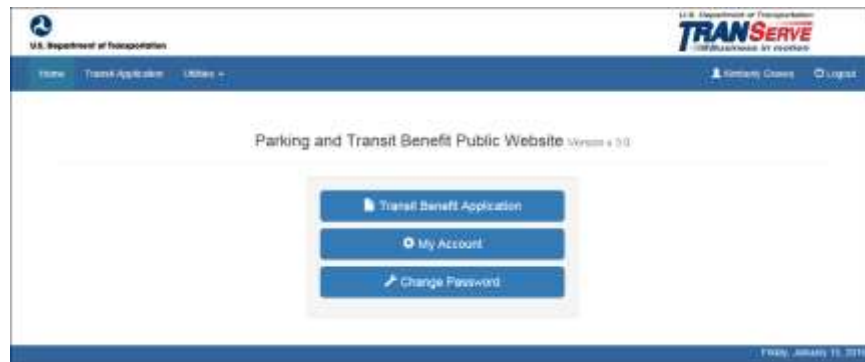
- To exit the system from a desktop, click the **Logout** button on the home page.
- To exit the system from a mobile device, click the additional menu button  at the top of page. Click the Logout button. The Login page is displayed.

### 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.

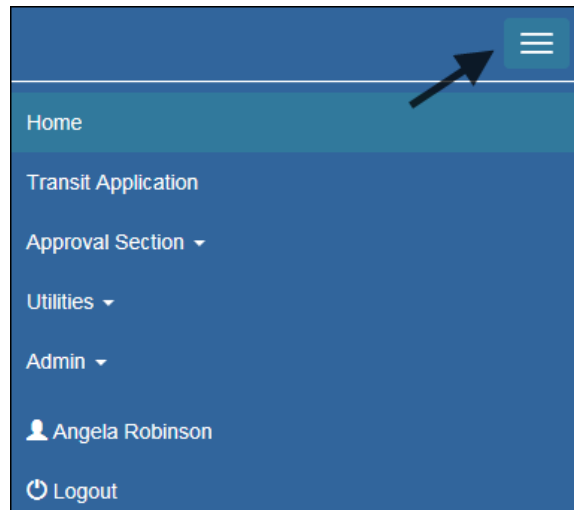
The home page is divided into two sections:

- 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.
  - ♦ Approval Section – This functionality is only available for Approving Officials: Supervisors, Budget Officers, and Program Admins. Click this tab to display the approval levels available to you. 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.
  - ♦ 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.
  - ♦ Approval Section – This functionality is only available for Approving Officials: Supervisors, Budget Officials, and Program Admins. Click this button to display the first level approval 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 16: 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.

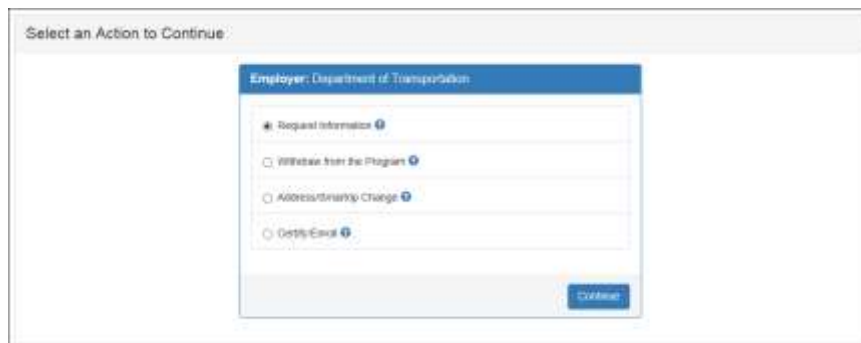


**Figure 17: Additional Menu Options**

### 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 18: Select An Action To Continue page**

#### 3.1.1 Request Information

The applicant can request information from the Agency 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] (Email)

Agency: [Text] (Agency)

Point of Contact: [Text] [Select]

Click the Select button to select Point of Contact.

Question: [Text]

[Send Request] [Cancel]

**Figure 19: 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 20: 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.
  - a. Click the **Continue** button. The Withdraw From The Program page is displayed.

**Figure 21: Withdraw From The Program page**

- b. Click the pop up calendar to select a withdrawal date.
  - c. Click the **Select** button to display the list for your agency's Supervisors.

**Figure 22: Approving Official (1<sup>st</sup> Approver)**

- d. Select your 1<sup>st</sup> Approving Official (1<sup>st</sup> Approver is the Supervisor).
  - e. Click the **Select** button to display the list for your agency's 2<sup>nd</sup> Approvers.



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

**Figure 23: Manager Fund/Certifier (2<sup>nd</sup> Approver)**

- f. Select your 2<sup>nd</sup> Approver.
- g. Enter any information that will assist your Agency Approver with processing your application in the Comment for Agency Approvers textbox.
- h. 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 24: Withdraw Confirmation**

**Note:** The applicant must be enrolled in the Transit Benefit Program thru the TRANServe Electronic Application (TEA) before they can withdraw. Registering a username does not mean that the applicant has enrolled in the program.

### 3.1.3 Address/SmarTrip® Change

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

1. Select the Address/ SmarTrip® radio button.
  - a. 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 main sections: "General Information", "Work Information", "Residence Information", and "SmarTrip Information".  
- **General Information:** Includes a "Username" field, a "Name" section with "First" (MARTIN) and "Last" (JESSICA) fields, an "Email Address" field (jessica.martin@trans.gov), an "Agency" dropdown (Department of Treasury (TRE-HQ)), and a "Work Phone" field.  
- **Work Information:** Includes a "Work Address" field, a "Work City" field, a "Work State" dropdown menu, and a "Work Zip" field.  
- **Residence Information:** Includes an "Address" field, an "Address 2" field, a "City" field, a "State" dropdown menu, and a "Zip" field.  
- **SmarTrip Information:** Includes a "SmarTrip Card Number" field.  
At the bottom right of the form are "Submit" and "Cancel" buttons.

**Figure 25: Change Address/ SmarTrip® page**

- b. Update the applicable information. Only update the section that needs to be changed. You are not required to complete an entirely new application.
    - c. 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 26: 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.
  - a. Click the **Continue** button. The Warning page is displayed.

A screenshot of a warning page with a red border. At the top, it says "WARNING !" in red. Below that, a paragraph states: "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." There are six bullet points of certification statements: 1. "I certify that I am employed by the U.S. Federal Government..." 2. "I certify that I am not named on a federally subsidized parking permit with any other federal agency." 3. "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." 4. "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." 5. "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." 6. "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, there are two buttons: "I Agree" (blue) and "I Do Not Agree" (orange).

**Figure 27: Warning page**

- b. 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.

**Certify/Enroll**

**Transit Benefit Application Worksheet**

All Transit Benefit Program Applicants are required to verify the "Total Monthly Expense" of their transit costs (Check Mass, Commute Commute)

**Publicing fees are not eligible for the transit benefit and must not be included in "Total Monthly Expense"**

**Instructions:** Enterable only "Total Monthly Expense"

- Based on your transportation methodology
- Enter the following information in the "Total Monthly Expense" input of each transportation method:
  - Name of Company for your method of transportation (Metro, BART, etc.)
  - Cost of monthly expense
  - Number of days you actually work in a month
  - If you purchase a monthly pass, divide the price of the pass by 2, and enter the information in the monthly expense column
  - The Total Monthly Expense value automatically calculates

Reason for Certification:

Costs Monthly:

Work Status:

**Transit Benefit Transportation Methods**

Always follow your agency's transit policy for applicable guidance on the days per month (MPD)

Default cost schedule example:

- If you work a fixed schedule of 4 days per day, the average amount of 20 days can be entered into the Days per Month column
- If you work a fixed schedule of 5 days per day, the average amount of 20 days can be entered into the Days per Month column
- If you work a compressed schedule of 10 days per day, the average amount of 10 days can be entered into the Days per Month column
- If you work a compressed schedule of 10 days per day, the average amount of 10 days can be entered into the Days per Month column

\*Based on a transportation methodology

Every Transit Benefit Program Participant is responsible to adjust the network of their transit benefit each month to reflect the actual cost of their transit to work consistently.

Transit Monthly Expense:

**Transit Benefit Program Application**

First Name:

Last Name:

Work Phone:

Email address:

Comments/Notes:

Department of V.A.:

Select Your Agency:

Region:

Business Unit:

Accounting Code:

Routing Agency:

Location/Building:

Comments/Notes:

Work Address:

Work City:

Work State:

Work Zip:

Supervisor Information:

Supervisor:

City:

State:

Zip:

Approver Information:

Approving Official:

Manager of and Certified:

Head of Office:

Manager Phone:

Transit/Bus Card Number:

Comments/Notes:

File Name:

Transit:

Cancel:

Figure 28: Transit Benefit Application Worksheet

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

- 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. This is for organizational changes within the Program
- ♦ 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 defaults to Civilian)
- ♦ Select your work status. (This feature defaults to Full Time)
- ♦ Full Time
- ♦ Part time
- ♦ Intern
- d. Select your transportation method(s).
- ♦ Bus

**Figure 29: Bus Method**

- ♦ Other Bus

**Figure 30: Other Bus Method**

## ♦ Rail

**Figure 31: Rail Method**

## ♦ Other Method

**Figure 32: Other Method**

## ♦ Vanpool

**Figure 33: Vanpool Method**

**Note:** If all 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 34: Sample Agency Work Schedule Policies**

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

**Figure 35: 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.

- f. Enter the Identifier. This is the U.S. Customs and Border Protection HASH ID.

- g. The Common Identifier is not in use in the OCC Electronic Application. It is hidden from view.
- h. Select the Region closest to your physical work location
- i. Select the Admin.
- j. Optional Fields: For OCC, two of these fields are hidden. All applicants must use the Location/Building Field to identify their Field Office. Click the **Select** link to display the list for your agency.

- k. Enter your Work Information.
- l. Enter your Residence Information. (The address from which you routinely commute)
- m. Click the **Select** button to display the list for your agency's 1<sup>st</sup> Approvers (Supervisor).

**Figure 36: 1<sup>st</sup> Approver**

- n. Select your 1<sup>st</sup> Approver. (Check the help menu to clarify)
- o. Click the **Select** button to display the list for your agency's 2<sup>nd</sup> Approvers (Budget Official) Check the help menu to clarify

**Figure 37: 2<sup>nd</sup> Approver**

- p. Select your Budget Official.
- q. Click the **Select** button to display the list for your agency's Points of Contact.

The screenshot shows a web application window titled "Point of Contact". It features a table with three columns: "Name", "Region", and "Email". Above the table is a search bar labeled "Type to filter..." and a dropdown menu. The table contains one row with the following data: "TREASURY POC" in the Name column, "DC" in the Region column, and "POC@Agency.gov" in the Email column. Below the table are navigation buttons: "<<", "<", "1", ">", and ">>". A "Close" button is located in the bottom right corner of the window.

**Figure 38: Points of Contact**

- r. Select your Point of Contact.
- s. Field Offices always enter "NA" in this required field. NCR employees, enter your SmarTrip® card information. If you have not purchased a SmarTrip®, enter NA. See [Appendix A – SmarTrip® Card Instructions](#).
- t. Enter any information that will assist your Agency Approvers with processing your application in the Comment for Agency Approvers textbox.



**Figure 39: Completed Transit Benefit Application**

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

**Figure 40: SmartBenefits® Program page**

- v. 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®)
- w. **Field Offices click the NO Thank You button.** 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.

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



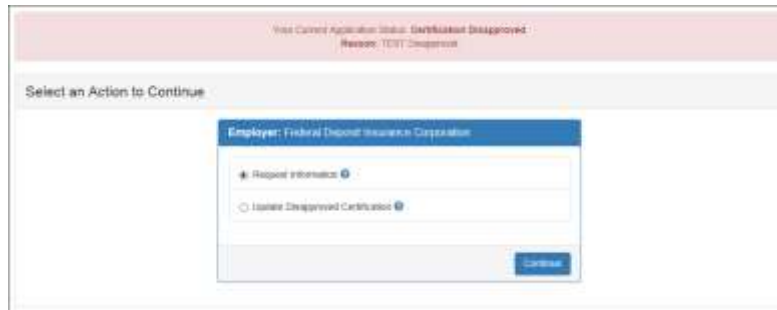
**Figure 41: Transit Benefit Program Confirmation**

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

### 3.1.5 Disapproved Applications

Applications that have been Disapproved are sent back to the applicant. Approvers must enter a reason for disapproval. The applicant must make corrections and resubmit the application.

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 42: Select An Action To Continue page**

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



**Figure 43: Warning page**

- c. After reading the message; click the **I Agree** button. The disapproved Transit Benefit Application Worksheet is displayed.

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

[illegible]

**Figure 44: 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.
- d. 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.

## 4. APPROVAL SECTION

The Approval Section allows the authorized user to view, approve or disapprove a transit benefit application. The user must be a 1<sup>st</sup> Approver (Supervisor), Approval Officer (Budget Official) or Approval/Supervisor (a combination of the 1<sup>st</sup> and 2<sup>nd</sup> Approvers), for instance a Budget Official who also Supervises or a 3<sup>rd</sup> Approver (Program Admin, Customer Service Desk( within the agency to which the application is being submitted. These roles are assigned by the TRANServe Transit Benefit Manager assigned to the Agency or the Agency Transit Benefit Program Office.

*Note: Approvers are unable to view or approve their own transit benefit application in an approval queue. 1<sup>st</sup> and 2<sup>nd</sup> Approvers will only see an application on which an employee has chosen their name.*

### 4.1 Approval Process

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

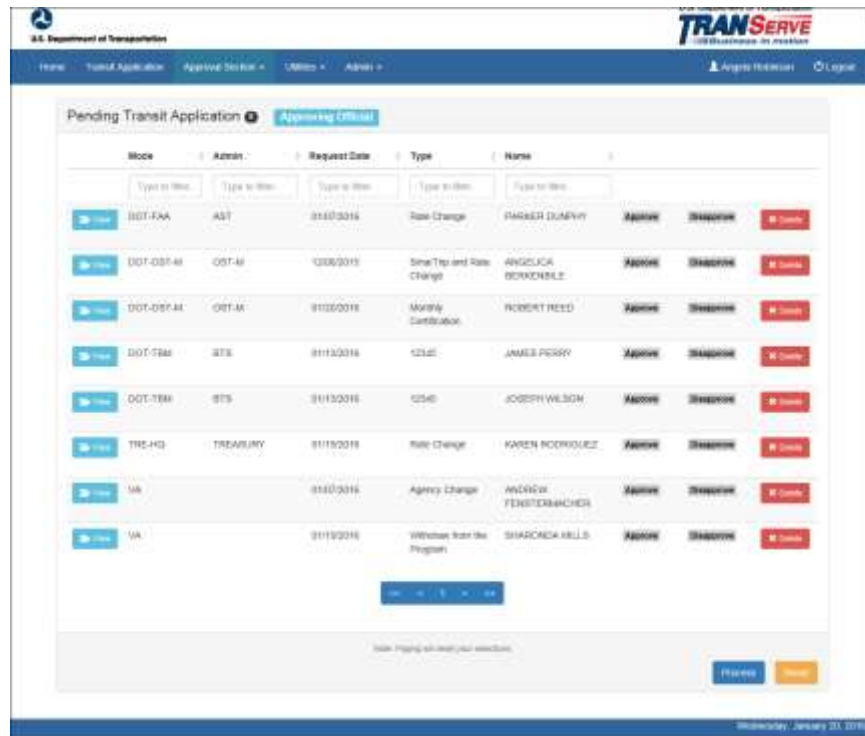


Figure 45: Approval page

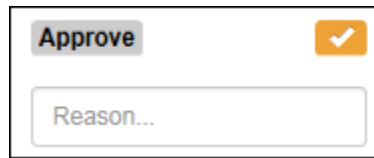
The number of applications awaiting review and approval is displayed next to the page title.

Pending Transit Application 8

- b. Review according to your Agency Policy, and then select Approve to approve the application. After the selection is made the label will change into a checkmark.

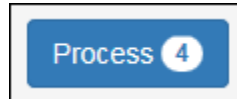


- c. Review according to your Agency Policy then select Disapprove to disapprove the application. After the selection is made the label will change into a checkmark.



- ♦ A reason is required when an application is disapproved. Enter a reason in the Reason textbox. Where possible give instructions for correction. (i.e. Correct Supervisor's name)

The number of applications approved or disapproved is displayed next to the **Process** button.



- d. Click the **Process** button to approve or disapprove the application.

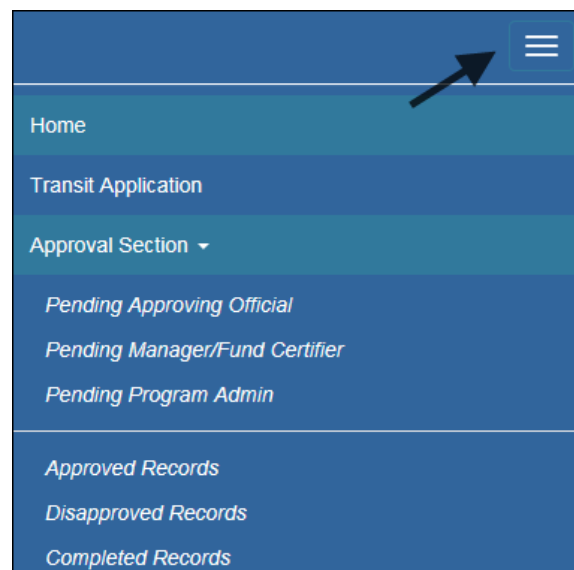
**Note:** Applications can be reviewed, approved or disapproved on the Transit Benefit Worksheet/Application page by clicking the **View** button for the desired applicant.

**Note:** Applicants can be filtered by entering in the first few letters of the Mode (Agency Name), Admin, Type, and Name. To filter by date, enter in the date the application was submitted in the Request Date filter textbox.

**Note:** Click the column header, and then click the arrow next to the column header 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. Click the sub-menu to enter the appropriate Approval Queue to review an application.



**Figure 46: Approval Section Menu Options**

### 4.1.1 Delete Application

Note: In most cases the applicant should delete their application to begin again. There are times when an approver will need to delete an application. (i.e. an employee separates and the application is still attached to an approver queue, sending the approver reminders.) Never delete a completed record.

1. Click the **Delete** button. The Delete Confirmation is displayed.

Figure 47: Delete Confirmation page

- a. Click the **Continue** button to delete the application. The approval page is re-displayed with the delete confirmation at the top of the page.

**Note:** The submitted application will be deleted and the applicant will need to resubmit another transit benefit 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. (Approved, Disapproved or Completed)

Mode	Admin	Request Date	Type	Name	Approval Date
DOT-OST-M	OST-M	05/18/2014	New Transit Benefit Participant	RAE SURSHINE	05/18/2014 09:50:26 PM
DOT-OST-M	OST-M-01	04/13/2016	12345	HUNG TEST CHUN	04/13/2016 01:15:53 PM
PDIC		12/22/2018	New Transit Benefit Participant	RAMERON GRETCHENTEST	01/07/2019 01:06:24 PM

Figure 48: Approved Records

Mode	Admin	Request Date	Type	Name	Reason
DOT-OST-M	OST-M-01	07/07/2015	SmartTrip and Rate Change	MOBILE APTEST TEST	
ED	OUS	10/30/2015	Rate Change	DARREN CHANG	gfr/ymfjg
PDIC	DC	10/29/2015	Rate Change	PAULEA LIPSCOMB	TEST Disapproval

Figure 49: 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.

**Figure 50: Find Completed Applications page**

**Note:** Enter at least one search criteria. If no search criteria are entered the system will retrieve and display all completed records. This load may be quite time consuming.

Pending Transit Application

6/6

Completed

	Mode	Admin	Request Date	Type	Name
	Type to filter	Type to filter	Type to filter	Type to filter	Type to filter
<a href="#">View</a>	DOT/ANCH	A-ROB	12/03/2016	Agency Change	ANNE AARON
<a href="#">View</a>	DOT/FTA	FTA	09/03/2016	TEST CERTIFICATION	HUNG CHUN
<a href="#">View</a>	DOT/FTA	FTA	05/04/2016	Agency Change	HUNG CHUN

**Figure 51: Completed Records**



## 5. ADMIN

The Admin function allows the Program Office to update users to 1<sup>st</sup> or 2<sup>nd</sup> Approver.

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

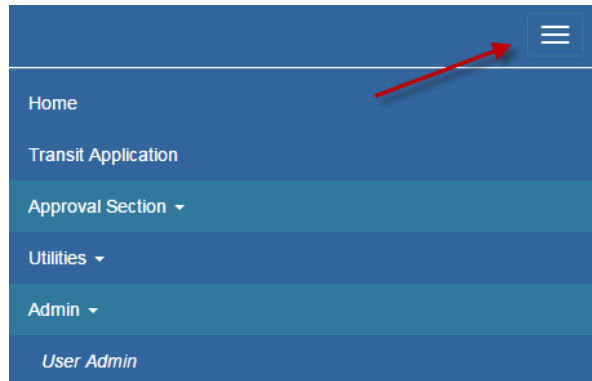


Figure 52: Admin Menu Options

### 5.1 User Admin

1. Mouse over the Admin menu bar; select the User Admin option. The Find Users page displays.

A screenshot of the 'Find Users' page. The page has a light gray background. At the top, there is a title 'Find Users'. Below the title, there are five search criteria fields: 'User Name' (with a placeholder 'Government Email Address'), 'First Name' (with a placeholder 'First Name'), 'Last Name' (with a placeholder 'Last Name'), 'Agency/Mode' (a dropdown menu), and 'Role' (a dropdown menu). The 'Role' dropdown is open, showing four options: 'Test Role', 'Read Only', 'Applicant', and 'Approving Office'. At the bottom right, there are two buttons: 'Search' and 'Cancel'. Below the search fields, there is a small note: 'NOTE: Leaves all fields blank in Find all Users. Enter any portion of your desired search criteria. The system will search for all entries that begin with the entered values.'

Figure 53: Find Users page

- a. To search for an existing user; enter the Username, First Name, Last Name, or select an Agency/Mode or Role from the dropdown menu.
- b. Click the **Search** button. The Search Results page displays.

**Note:** At least one search criteria field should be entered; if no search criteria are entered the system will retrieve and display all users. This load may be quite time consuming.

User Name	First Name	Last Name	Mode	Role
1. lewis@usda.gov	Tammy	Deke	USDA	Manages Fund Center
2. frederick@usda.gov	Frederick	Garnes	USDA	Manages Fund Center
3. adam.jeffries@usda.gov	Adam	Jeffrey	USDA	Applicant

**Figure 54: Users Search Results page**

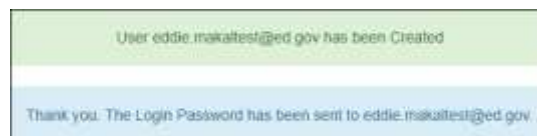
**Note:** Applicants can be filtered by entering in the first few letters of the Mode, First Name, Last Name, and Role.

### 5.1.1 Add User

1. From the User Admin page; click the **Add New User** button. The Account Information page displays.

**Figure 55: Add User Account Information page**

- a. Enter the applicant's official government email address in the User Name textbox.
- b. Complete the account information form.
- c. Select the user role from the Role dropdown.
- d. Click the **Add User** button. The Add User Confirmation displays.



**Figure 56: Add User Confirmation**

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

**Note:** The agency used in the email for the username will determine the agency names displayed in the Agency dropdown.

**Note:** This page can also be accessed by hovering over the Admin menu option and clicking the Add New User sub-menu option. In most cases all users should create their own profile using the Registration

process on the login page. When an Admin creates a new user, they also create a communication chain to inform and educate the user to obtain the password through their official government email address. This slows the process and also defeats the control point of the user providing all certified information.

### 5.1.2 Update User

1. From the User Admin page; click the [Username](#) link. The Update User Account Information page displays with the applicant's information.

**Figure 57: Update User Account Information page**

- a. Update the applicant's user information.
- b. Click the **Update User** button. The Update User Confirmation displays.

User eddie.makaltest@ed.gov has been Updated

**Figure 58: Update User Confirmation**

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

**Note:** After the Add User button is clicked the page re-displays as the Update User Account Information page. Updates can be made on this page.

### 5.1.3 Delete User

1. From the User Admin page; click the **Delete** button. The Confirm Delete message displays.

**Figure 59: Confirm Delete Message**

- a. Click the **Delete** button to confirm deletion. The Delete Confirmation is displayed.

User eddie.makaltest@ed.gov has been Deleted

**Figure 60: Delete Confirmation**

## 5.1.4 Bulk Update View

The Bulk Update View allows the administrator to update multiple user roles at one time.

1. From the User Admin page; click the **Bulk Update View** button. The Bulk Update View page displays.

User Name	First Name	Last Name	Role	Role
<a href="#">Select</a> sarahy@usda.gov	Sarah	Deft	USDA	Manager Fund Center
<a href="#">Select</a> frederickgaines@usda.gov	Frederick	Gaines	USDA	Manager Fund Center
<a href="#">Select</a> adon.jefferson@usda.gov	Adon	Jeffers	USDA	Approval

Figure 61: Bulk Update View page

### 5.1.4.1 Single User Role Update

1. Click the **Select** button next to the username. The button changes to a check mark after it is selected.

Figure 62: Single Username Select

- a. Click the down arrow for the User Role dropdown menu.

Figure 63: Role Change Select

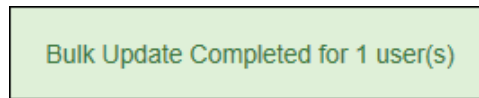
- b. Select the desired user role from the dropdown menu.

Figure 64: Role Update

- c. Click the **Process** button. The Confirm Bulk Update message is displayed.

Figure 65: Confirm Bulk Update Message

- d. Click the **Process** button to confirm the update and close the dialog box. A confirmation message is displayed at the top of the page.



**Figure 66: Role Update Confirmation**

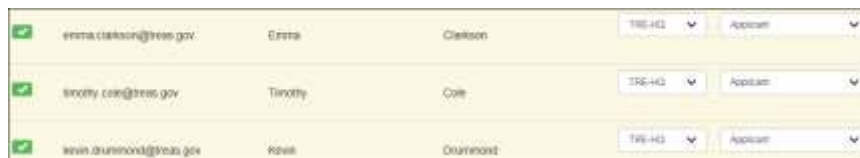
**Note:** If the user is associated with an Agency that has multiple Modes/Agency Names, the Mode can be updated using the same steps used to update the User Role.



**Figure 67: Multiple Modes**

### 5.1.4.2 Multiple User Role Update

1. Click the **Select** button next to the usernames. The button changes to a check mark after it is selected.



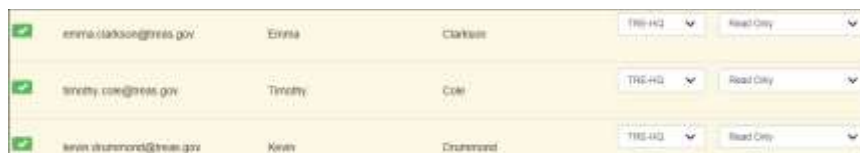
**Figure 68: Multiple Username Select**

- a. Click the down arrow for the Bulk Role Update dropdown menu at the top of the page.



**Figure 69: Bulk Role Update Select**

- b. Select the desired user role from the dropdown menu.



**Figure 70: Bulk Role Update**

- c. Click the **Process** button. The Confirm Bulk Update message is displayed.



**Figure 71: Confirm Bulk Update Message**

- d. Click the **Process** button to confirm the update and close the dialog box. A confirmation message is displayed at the top of the page.

**Note:** Program Admins can only update user roles below the Program Admin level within their Agency.

*TRANServe Admins can only update user roles below the TRANServe Admin level.*

*TRANServe Transit Benefit Managers can only update user roles below the TRANServe TBM level.*

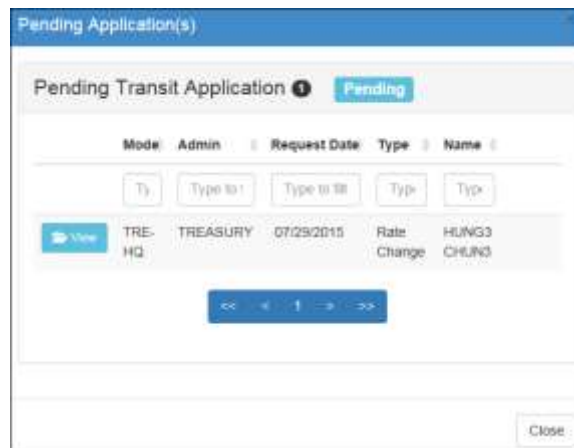
### 5.1.4.3 Role Update Lock

**Approvers must complete all pending applications prior to having their roles updated.** This will ensure that applications are not orphaned when user roles are changed. This includes applications that are anywhere in the approval process. The number of pending applications is displayed in place of the **Select** button.



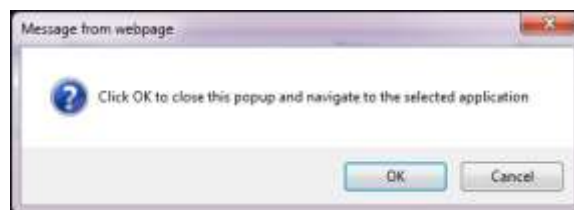
**Figure 72: Pending Application Link**

1. Click the number next to the username to display the Pending Transit Benefit Application Status page.



**Figure 73: Pending Transit Benefit Application Status page**

- a. Click the **View** button next to the applicant's name. A confirmation message is displayed. Click the **OK** button.



**Figure 74: Open Application Confirmation Message**

The application is opened. If the status is at the final approving level the application is approved and will display the status at the top of the page (i.e. CERTIFICATION DISAPPROVED or WITHDRAWAL APPROVED).



If the application needs further approval the buttons will display at the top of the page along with the pending certification level.



The screenshot shows a web application interface. At the top, there are three buttons: 'Approve' (blue), 'Deny' (orange), and 'Cancel' (grey). Below these buttons is a text input field labeled 'Reason'. At the bottom of the interface, there is a status bar that reads 'Certify/Enroll (ANDREW FENSTERMACHER)' and a button labeled 'Status: Certification Pending (Approving Official)'.

## APPENDIX A: SMARTRIP CARD INSTRUCTIONS

For SmartBenefit Participants: Purchase and Register a SmarTrip® card

SmarTrip® card usage is mandatory for all participants in the National Capital Region.

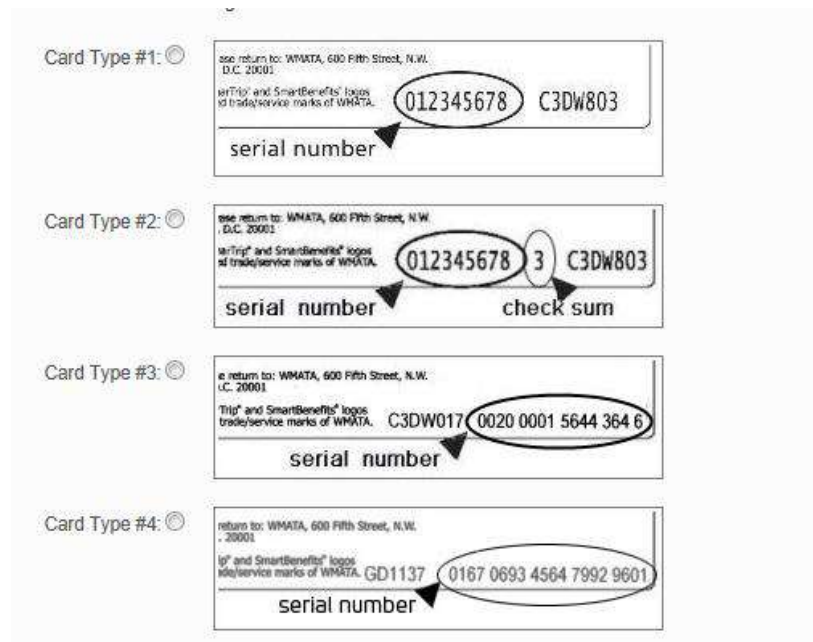
1. Purchase a SmarTrip® Card – This is a reloadable electronic fare card. Using a reloadable card supports government initiatives to support and improve the environment through more sustainable practices.
  - ♦ a. You can purchase at a Metro Sales Store, Station Kiosk (these are located in Stations where parking is available, a Commuter Store and many retail establishments.

**Note:** Look here for more information on locations: <http://www.wmata.com/fares/purchase/where.cfm>

- ♦ You can also purchase a SmarTrip® Card on line: <http://www.wmata.com/fares/purchase/>

**Note:** An online order requires you to provide a shipping address which must match the billing address on line with your credit card provider.

- a. Create a Personal Account to register your SmarTrip® Card. You must register your SmarTrip® card with WMATA in order to receive your transit benefit electronically. Registration may take up to 48 hours to be reflected in the WMATA system. An additional benefit of registering your card is to protect the funds on the card. If lost or stolen you may cancel the card. After you replace your SmarTrip® card, you can transfer the funds to the new card.
- ♦ Register your SmarTrip® card here: <https://SmarTrip.wmata.com/Registration/Register.aspx>
  - ♦ You must indicate the type of card by matching the serial number on the back with the pattern that is circled below:



**TIP 1:** Enlarge the number on a Xerox machine and attach to your application

**TIP 2:** If your SmarTrip® (or CharmCard) serial number is fewer than nine (9) digits, you need to add zero(s) to the front to make it nine (9) digits.