

# OM

Security, Facilities and  
Logistics Services  
Division Transportation  
Services Branch



# TRANSIT BENEFIT APPLICATION GUIDE

*Have a Question about Transportation?  
Contact the Transportation Services Branch!*

[OMMSTransportationservices@ed.gov](mailto:OMMSTransportationservices@ed.gov)

202-401-2905 or 202-401-3861



## Contents

|     |   |    |
|-----|---|----|
| 1   | INTRODUCTION .....                                      | 2  |
| 1.1 | PURPOSE .....   | 2  |
| 1.2 | BACKGROUND.....   | 2  |
| 1.3 | PAYMENT OPTIONS.....                                    | 2  |
| 2   | APPLICATION PROCESS.....                                | 3  |
| 2.1 | COMPLETE INTEGRITY AWARENESS TRAINING .....             | 3  |
| 2.2 | REGISTER IN TRANSERVE WEBSITE.....                      | 10 |
| 2.3 | CHANGE PASSWORD .....                                   | 14 |
| 2.4 | COMPLETE AND SUBMIT ONLINE APPLICATION.....             | 16 |
| 3   | APPLICATION APPROVAL PROCESS (FLOWCHART) .....          | 23 |
| 4   | EXECUTIVE OFFICERS LIST (APPROVING OFFICIAL LIST) ..... | 24 |



## 1 INTRODUCTION

### 1.1 PURPOSE

The purpose of this document is to guide the user on how to apply for the Department of Education’s Transit subsidy program. The Transit Benefit application process consists of three steps:

- 1) Completion of the Integrity Awareness Training via the Talent Management System (TMS),
- 2) Register via TRANServe website, and
- 3) Complete and submit application via online TRANServe website.

### 1.2 BACKGROUND

To assist employees with to and from commuting cost. The Department of Education offers up to one hundred and twenty-five (\$125) per month.

### 1.3 PAYMENT OPTIONS

There are two payment options:

| SMARTrip Card (Smart Benefits DC are only)   | TRANServe Debit Card   |
|--|--|
|  <p>Download and view transit benefit balance here</p>  |   |
| <ul style="list-style-type: none"> <li>• Purchase at Metro Station or CVS</li> <li>• 10 business days to receive benefits (auto-load via metro gate turnstile)</li> <li>• <b>Benefits auto-load on the first of the month</b> (smart benefits balance viewed ONLY via metro gate turnstile display panel)</li> <li>• Separates personal and transit benefit funds</li> </ul> <p><b>IMPORTANT: Register SMARTrip card before completing application. Register: click <a href="#">“Register Smartrip”</a> or contact 888-762-7874.</b></p> | <ul style="list-style-type: none"> <li>• 15-30 business days to receive card</li> <li>• Widely accepted by transit authorities</li> <li>• Online payment options</li> </ul> <p><b>IMPORTANT: Card is allotted funds on 10<sup>th</sup> of every month. Any remaining balance is credited back to agency on the 9<sup>th</sup> of every month. Example: Funds added on the month of January 10, is for the month of February.</b></p> |



## 2 APPLICATION PROCESS

### 2.1 COMPLETE INTEGRITY AWARENESS TRAINING

Complete Transit Benefit Integrity Awareness Training via TMS.

**NOTE:** Interns will need to obtain the Power Point version of the Integrity Awareness Training from Executive Officer or contact [OMMSTransportationservices@ed.gov](mailto:OMMSTransportationservices@ed.gov).

Log on to <http://transerve.dot.gov>

Click on “Participants”

The screenshot shows the TRANSERVE website interface. At the top left is the TRANSERVE logo with the tagline "Business in Motion". To the right is the United States Department of Transportation logo. A search bar is located at the top center. Below the logos is a navigation menu with the following items: HOME, PARTICIPANTS (highlighted with a black arrow), F.A.Q., DEBIT CARD, RESOURCES, RETURN OF EXCESS TRANSIT BENEFIT, and CONTACT US. The main content area features a "News" section with a background image of a transit station. Below the news section is a "DOT Spotlight" section titled "Going Green with Electronic Fare Media!". The text describes the implementation of program methodologies to support Green Government by moving towards electronic fare media. It mentions that the program is to use a single fare media delivery system that offers enhanced internal controls and preserves the transit benefit by preventing fraud, waste and abuse. Below this is another section titled "Electronic Method of Distributing Transit Benefit Saves Government Money and Makes Choosing Mass Transit Easier for Federal Employees". This section includes a sub-headline "WASHINGTON – The U.S. Department of Transportation has introduced an effective and cost-efficient way for government employees to receive their monthly transit benefit through the use of a federal debit card." and a small image of a hand holding a TRANSERVE debit card. To the right of the main content area is a "DOT Parking/Transit Office" section with a "Contact Us" link, "Normal Hours: Monday – Friday, 9:00 a.m. – 1:00 p.m.", and the date "Friday August 28, 2015". Below this is a link for "[Office address and info]" and another link for "Mobile Commuter Store Bus at DOT HQ on Thursdays!". At the bottom right of the page are four icons: "links", "metro", "weather", and "traffic".



Scroll down until you see Education

Click on “EDUCATION”

Click on “Transit Benefit Integrity Awareness Requirement (TMS)”

A screenshot of the website dot.gov/participants.html. The page is divided into two main columns. The left column contains a vertical list of agency names, each preceded by a blue plus sign in a square. The agencies listed are CPSC, DHS-ICE, DHS-CIS, DISA-REG (Fort Meade), DOC-ESA, DOC-NOAA, DOC-OIG, DOC-OS, DOI-USGS, DOJ-OIG, DOT, Education, and EEOC. The 'Education' entry is highlighted with a dashed border, and a black arrow points to it from the right. Below the 'Education' entry, there is a sub-section titled '1. Department of Education Transit Benefit Program'. Under this section, there is a list of links: 'Transit Benefit Integrity Awareness Requirement (TMS)', 'Transit Benefit Program Application System', 'Transit Benefit Applicant's Guide', 'How to Register your SmartTrip Card', 'Email: OMMSTransportationServices@ed.gov', 'Phone: 202-401-2905', 'ED Transportation Services Survey', and 'ED Transit Benefit Program Intranet Policies and Procedures'. A black arrow points to the first link, 'Transit Benefit Integrity Awareness Requirement (TMS)'. The right column of the page contains a list of various transit benefit notices, each starting with a date and a title, such as 'TSB-2015-13R Daily Parking Pre Payments - Revised', 'TSB-2015-12R Bicycle Benefit Claim 2015 - Revised', 'TSB-2015-11R CyberSecurity Upgrade - Revised', 'TSB-2015-11 CyberSecurity Upgrade', 'TSB-2015-10 Federal Protective Services Garage Patrol', 'TSB-2015-09 Special Event Dates for FY2015', 'TSB-2015-08 Announcing DOT 2015 Transit Benefit Recertification', 'TSB-2015-07 Increased Garage Traffic', 'TSB-2015-06 DOT HQ Parking and Transit Benefit (PTB) System Conversion', 'TSB-2015-05 DOT HQ Parking and Transit Benefit System Maintenance Shutdown', 'TSB-2015-04 Bicycle Benefit Claims', 'TSB-2015-03 DOT HQ Parking Policy Rev. and New Vehicle Barriers Operational Changes', 'TSB-2015-02 Oahu Transit - Purchase TheBus Monthly Bus Passes with TRANServe's Debit Card', 'TSB-2015-01 Closure M Open House', 'TSB-2014-10 ORCA ALERT', 'TSB-2014-09 Bicycle Benefit Claims', 'TSB-2014-08 Password Compliance', and 'TSB 2014-07 DOT Annual Transit Benefit Recertification Announcement'.

CLICKING ON “TRANSIT BENEFIT INTEGRITY AWARENESS REQUIREMENT” WILL REDIRECT YOU TO THE TMS WEBSITE (separate website from TRANServe).



## Log into TMS

- Your ED email address (all capital letters) should be used as your User ID
- Contact TMS at 888-367-1622, for password assistance.

https://tms.ibt.doi.gov/learning/user/login.do

Learning and Performance

### Welcome

Department of the Interior's Interior Business Center and their industry-leading partner, Success Factors, bring you the foremost enterprise software that manages learning and organizational readiness.

This is a United States Government computer system, maintained by the Department of the Interior, to provide Official Unclassified U.S. Government Information only. Use of this system by any authorized or unauthorized user constitutes consent to monitoring, retrieval, and disclosure by authorized personnel. USERS HAVE NO REASONABLE EXPECTATION OF PRIVACY IN THE USE OF THIS SYSTEM. Unauthorized use may subject violators to criminal, civil, and/or disciplinary action.

**Login Information:**

- Your User ID is **case sensitive**
- If you **forgot** your password, click the [Forgot Password?](#) Link under the "Welcome" box. You will need your User ID and secret question answer to have the system send you a new password to the email account contained in your TMS record. The email with your new password should arrive in your inbox within 5 minutes.
- If you **lock** your account, you will be prompted to unlock it by entering your User ID and secret question answer. The system will send you a new password to the email account contained in your TMS record.
- If you forgot or have not created a secret question, contact the IBC Customer Service Center **Monday - Friday, 6:00 a.m. - 4:00 p.m. MT** via one of the following methods:

**Toll-free:** 1-888-367-1622  
**Email:** [FPFS\\_Helpdesk@ios.doi.gov](mailto:FPFS_Helpdesk@ios.doi.gov)  
**TTY:** 1-800-877-8339

**\*\*TMS OUTAGE INFORMATION\*\***

**TMS is unavailable during the following times for weekly maintenance:**

**Sunday: 3:00AM - 3:45AM MT and 6:00AM - 1:15PM MT**

**Please Sign In**

User ID:

Password:

[Forgot Password?](#) [Forgot ID?](#)

[TMS Take-Away Job Aids, Support and FAQs](#)

If your agency directed you to use TMS, you have been provided a valid User ID and a Password.

Interior, DEPARTMENT OF EDUCATION, NATIONAL PRODUCT SAFETY COUNCIL, DEPARTMENT OF TRANSPORTATION, U.S. DEPARTMENT OF JUSTICE, NATIONAL TRANSPORTATION SAFETY BOARD, U.S. DEPARTMENT OF ENERGY, OPIC



After signing into TMS, type “[Transit Benefits Integrity Awareness Training](#)” or “[Integrity Awareness](#)” in the Search Catalog box

The screenshot displays the TMS interface. On the left, there is a 'Search Learning Plan' box with the text 'There are no records found.' Below this, an orange callout box contains the text 'Search, "Integrity Awareness"'. An arrow points from this callout box to the 'Search Catalog' box on the right. The 'Search Catalog' box has a search input field and a 'Go' button. Below the search box is a 'Browse' link. The right sidebar contains several sections: 'Easy Links' with links for Approvals, External Requests (SF-1...), News, Options and Settings, Performance Appraisals, Reports (Print REACH A..., and Start a Self Assessment; 'Status' with 'Curricula' showing 0 Overdue, 1 Due in 30 days, and 0 Due Later; 'Completed Work' showing 1 item completed in the last 30 days; 'Competencies' showing no assigned competencies; 'Elements and Goals' showing 0% Complete, 0% In Progress, and 100% Behind; and 'Career Path'.



Complete the Transit Benefit Integrity Awareness Training, Click [“Transit Benefit Integrity Awareness Training”](#)

A screenshot of a web application's search interface. At the top, there is a search bar with the text "integrity awareness" and a "Go" button. Below the search bar, it says "You searched for 'integrity awareness'". On the left side, there is a "Narrow Courses:" section with a "Category" dropdown menu showing options like "Instructor-Led", "Online", "Other", and "Curricula". The main content area shows a list of courses under the heading "Courses (1)". The first course is "Transit Benefits Integrity Awareness Training (ONLINE ED\_OM\_TRANSITBENEFITS)". It is marked as an "Online Course" and has a green checkmark indicating it is "Already On Plan". There is also a "Continue Course" button. The price is listed as "0.00 USD". An arrow points to the course title.

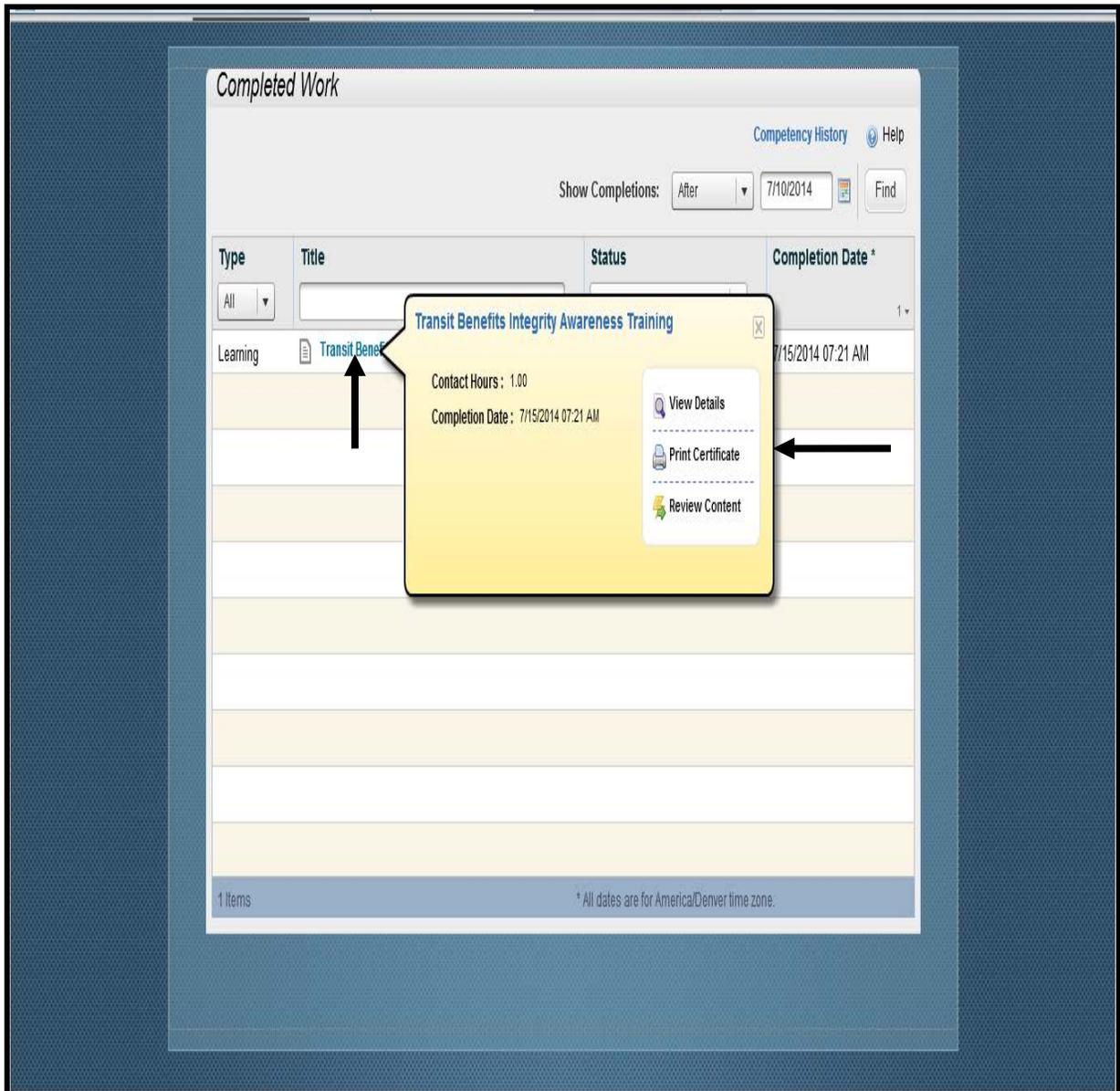


After completing the Integrity Awareness Training  
Click on “Home” tab  
Click on “Completed Work”

The screenshot shows the TMS (Transit Management System) interface for user SIDNEY MURRISH, PROGRAM SPECIALIST / PROGRAM SPECIALIST, TRANSPORTATION SERVICES DIVISION. The interface includes a navigation bar with a 'Home' tab highlighted by an arrow. The main content area displays the user's name and title, a 'Learning Plan' section with a search bar and a 'Show: Registrations' dropdown, and a right-hand sidebar with sections for 'Easy Links', 'Status', 'Completed Work', 'Competencies', 'Elements and Goals', and 'Career Path'. An arrow points to the 'Completed Work' section, which shows '1 item completed in the last 30 days'.



Hover cursor on “[Transit Benefit Integrity Awareness Training](#)”



Click “[Print Certificate](#)”

Print the completed certificate and provide a copy to your Executive Officer. Please refer to [Executive Officer List \(aka Approving Official\)](#).



## 2.2 REGISTER IN TRANSERVE WEBSITE

### Return to the TRANServe Website

Register at the TRANServe website: <http://transerve.dot.gov/>

Click “Participants”

The screenshot shows the TRANServe website interface. At the top left is the TRANServe logo with the tagline "Business in motion". To the right is the United States Department of Transportation logo. A search bar with a "Go" button is located in the top right. Below the logos is a navigation menu with the following items: HOME, PARTICIPANTS (highlighted with a blue background), F.A.Q., DEBIT CARD, RESOURCES, RETURN OF EXCESS TRANSIT BENEFIT, and CONTACT US. An arrow points to the "PARTICIPANTS" link. The main content area features a "Participants" header with a background image of hands raised. Below the header, the text reads: "Federal employees committed to using mass transportation for their home to work to home commute are eligible to receive the federal transit benefit. TRANServe supports you with simplified access to transit authority information, electronic applications, how-to instructions and other resources that encourage your use of mass transportation as your primary means of commuting from home to work. The transit benefit is a subsidy, not an entitlement. Simply stated, it can go away. Protect your transit benefit by following a few basic rules: • Apply using your Agency's established application process • Spend the transit benefit to make a direct purchase through your transit authority • Ride mass transportation for the bulk of your own home to work to home commute • Comply with your Agency's Transit Benefit Program Policy Always Protect Your Transit Benefit – Any month the amount you receive exceeds the amount you use, you must return the excess funds to your Agency!" To the right of the main content is a sidebar with the following information: "DOT Parking/Transit Office", "Contact Us" with an email icon, "Normal Hours: Monday – Friday, 9:00 a.m. – 1:00 p.m.", the date "Tuesday August 12, 2014", a link for "[Office address and info]", and a link for "Mobile Commuter Store Bus at DOT HQ on Thursdays!". At the bottom of the sidebar are four icons: "links", "metro", "weather", and "traffic".



Click “Education”

Click “Transit Benefit Program Application System”

dot.gov/participants.html

- + CPSC
- + DHS-ICE
- + DHS-CIS
- + DISA-REG (Fort Meade)
- + DOC-ESA
- + DOC-NOAA
- + DOC-OIG
- + DOC-OS
- + DOI-USGS
- + DOJ-OIG
- + DOT
- **Education**
  - 1. Department of Education Transit Benefit Program
    - [Transit Benefit Integrity Awareness Requirement \(TMS\)](#)
    - [Transit Benefit Program Application System](#)
    - [Transit Benefit Applicant's Guide](#)
    - [How to Register your SmarTrip Card](#)
    - Email: [OMMSTransportationServices@ed.gov](mailto:OMMSTransportationServices@ed.gov)
    - Phone: 202-401-2905
    - [ED Transportation Services Survey](#)
    - [ED Transit Benefit Program Intranet Policies and Procedures](#)
- + EEOC

- [TSB-2015-13R Daily Parking Pre Payments - Revised](#)
- [TSB-2015-12R Bicycle Benefit Claim 2015 - Revised](#)
- [TSB-2015-11R CyberSecurity Upgrade - Revised](#)
- [TSB-2015-11 CyberSecurity Upgrade](#)
- [TSB-2015-10 Federal Protective Services Garage Patrol](#)
- [TSB-2015-09 Special Event Dates for FY2015](#)
- [TSB-2015-08 Announcing DOT 2015 Transit Benefit Recertification](#)
  1. [DOT Recertification Guide](#)
  2. [DOT Q & A Sessions Schedule](#)
- [TSB-2015-07 Increased Garage Traffic](#)
- [TSB-2015-06 DOT HQ Parking and Transit Benefit \(PTB\) System Conversion](#)
- [TSB-2015-05 DOT HQ Parking and Transit Benefit System Maintenance Shutdown](#)
- [TSB-2015-04 Bicycle Benefit Claims](#)
- [TSB-2015-03 DOT HQ Parking Policy Rev. and New Vehicle Barriers Operational Changes](#)
- [TSB-2015-02 Oahu Transit - Purchase TheBus Monthly Bus Passes with TRANServe's Debit Card](#)
- [TSB-2015-01 Closure M Open House](#)
- [TSB-2014-10 ORCA ALERT](#)
- [TSB-2014-09 Bicycle Benefit Claims](#)
- [TSB-2014-08 Password Compliance](#)
- [TSB 2014-07 DOT Annual Transit Benefit Recertification Announcement](#)



Click the "Register" button

REMEMBER- You ONLY NEED TO REGISTER ONCE.

TRANServe  
~ business in motion ~

Facilities Service Center - TRANServe  
Transit Benefits Program

LOG IN

User Name:

Password:  [Forgot Password?](#)

Log In

NOT REGISTERED YET?

## Complete the registration form

Use your ED email address as your User Name and your desk phone number

TRANServe  
~ business in motion ~

Facilities Service Center - TRANServe  
Transit Benefits Program

ACCOUNT INFORMATION

\*User Name:

\*First Name:

Middle Name:

\*Last Name:

\*Agency/Mode:

Phone Number:



Click “[Register](#)”

TRANServe System will generate a password and send it to your ED email address. Then, the system will return to the Log in screen

The screenshot shows the TRANServe web interface. At the top left is the TRANServe logo with the tagline “~ business in motion ~”. At the top right, it says “Facilities Service Center - TRANServe” and “Transit Benefits Program”. The main content area is titled “ACCOUNT INFORMATION” and contains the following fields:

- \*User Name: victoria.owens@dot.gov
- \*First Name: Victoria
- Middle Name: (empty)
- \*Last Name: Owens
- \*Agency/Mode: DOT-OST-WCF M-70 (dropdown menu)
- Phone Number: 202-366-0001

Below the fields are three buttons: “Register”, “Cancel”, and “Reset”. A black arrow points to the “Register” button.

From the Log in screen, enter your User Name (ED email address) and Password. Click “[Log In.](#)”

The screenshot shows the TRANServe web interface for logging in. The main content area is titled “LOG IN” and contains the following fields:

- User Name: vikkey.owens
- Password: (masked with dots) [Forgot Password?](#)

Below the fields is a “Log In” button. At the bottom of the form, it says “NOT REGISTERED YET?” followed by a “Register” button. A black arrow points to the “Log In” button.



## 2.3 CHANGE PASSWORD

Once logged in, select “Change Password”





Complete the Change Password form  
Click “Submit”

The screenshot shows a web interface with a blue header bar containing the links "Home", "Utilities", and "Logout". The main content area is titled "CHANGE PASSWORD" and contains the following fields and buttons:

- Current Password:  (masked with dots) and a "Show Hint" button.
- Create New Password:  (masked with dots).
- Reenter New Password:  (masked with dots).
- Create a Hint\*:  (containing "First Date").
- A "Submit" button at the bottom.

Below the form, there is a note: "\*A hint is a meaningful personal association to help you remember your password. This is optional, but highly recommended." An arrow points to the "Submit" button.

“Password Changed!” will be displayed

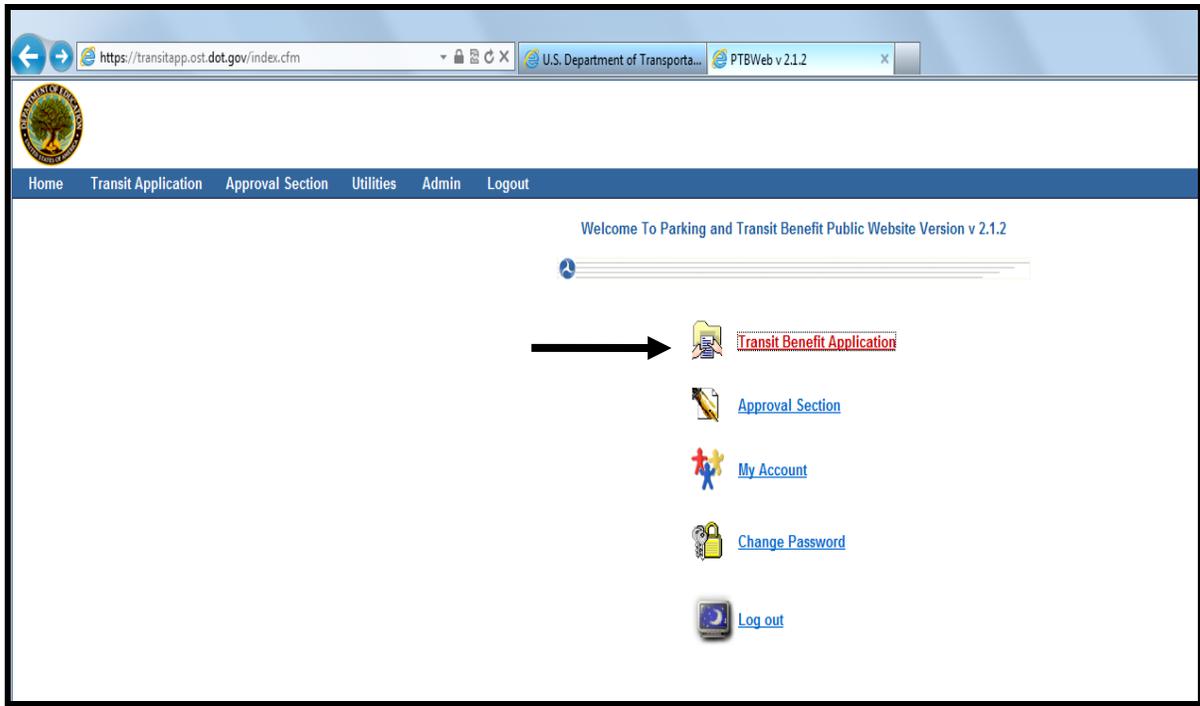
Return to the Home screen, click “Home” on the blue menu bar

The screenshot shows the same "CHANGE PASSWORD" form as above, but with a red message "PASSWORD CHANGED!" displayed at the top. The form fields are now empty. In the blue header bar, the "Home" link is highlighted with an arrow pointing to it.

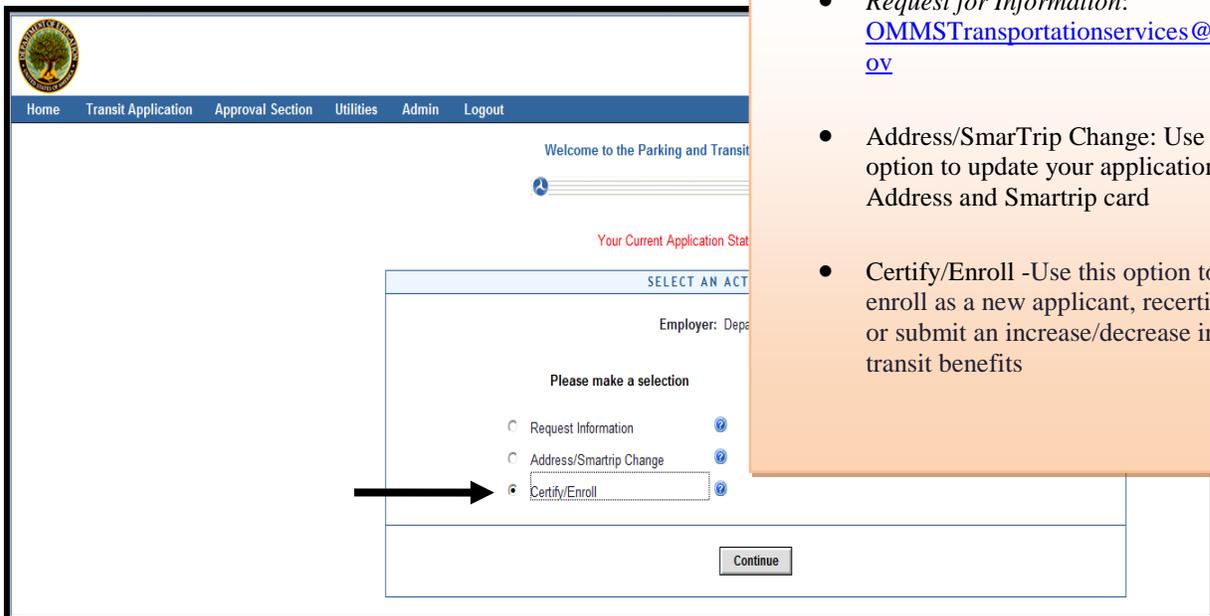


## 2.4 COMPLETE AND SUBMIT ONLINE APPLICATION

Select “Transit Benefit Application”



Click on “Certify/Enroll” to enroll as new user  
Click “Continue”



### OPTIONS:

- *Request for Information:*  
[OMMSTransportationservices@ed.gov](mailto:OMMSTransportationservices@ed.gov)
- *Address/Smartrip Change:* Use this option to update your application for Address and Smartrip card
- *Certify/Enroll* -Use this option to enroll as a new applicant, recertify, or submit an increase/decrease in transit benefits



Read the terms and conditions of the Transit Benefit Program  
Click “I Agree” to proceed with the application process

***YOU MUST AGREE TO THE TERMS AND CONDITIONS OF THE TRANSIT BENEFIT PROGRAM TO PROCEED WITH THE APPLICATION.***

**TRANServe**  
- business in motion -

Facilities Service Center - TRANServe  
Transit Benefits Program

Home Transit Application Approval Section Utilities Admin Logout

**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. Federal Government.
- I certify that I am not named on a federally subsidized parking permit with any other federal agency.
- I certify that I am eligible for a public transportation fare benefit, will use it for my daily commute to and from work by public transit or vanpool, and will not give, sell, or transfer it to anyone else.
- I certify that in any given month, I will not use the Government-provided transit benefit in excess of the statutory limit. If my commuting costs per month on public transit exceed the month statutory limit, then I will supplement those additional costs with my own funds rather than use a Government-provided transit benefit designated for use in a future month.
- I certify that I will not claim the transit benefit in excess of my actual monthly commuting expense. If at anytime during a given month I am out of work due to sickness, vacation or any other reason, on official travel, or use a private vehicle for commuting, I will claim less and adjust the amount of my transit benefit the following month if appropriate.
- I certify that my parking fees are not included in the computation of the daily, weekly or monthly commuting costs for my transit benefit.



## THE TRANSIT BENEFIT APPLICATION WORKSHEET

| TRANSIT BENEFIT APPLICATION WORKSHEET   |  |  |   |
|---|--|--|---|
| <p>All Transit Benefit Program Applicants are required to certify the "Total Monthly Expense" of their <u>Home to Work Mass Transit Commute</u>.</p> <p><b>Parking fees are not eligible for the transit benefit and must not be included in "Total Monthly Expense".</b></p> <p>Instructions: To calculate your "Total Monthly Expense"</p> <p>a. Select your transportation method(s)<br/>                     b. Enter the following information in the "To Work" and "From Work" row(s) of each transportation method:<br/>                         i. Name of Company for your method of transportation (Metro, BART, Subway)<br/>                         ii. Daily or Monthly Expense<br/>                         iii. Number of days you routinely work in a month<br/>                     c. If you purchase a Monthly pass, divide the price of the pass by 2, and enter the information in the Monthly Expense column.<br/>                     d. The Total Monthly Expense value automatically populates</p> |  |  |   |
| * indicates required field.   |  |  |   |
| 1   | *Reason for Certification: <input type="text"/>  |  |   |
| *Select your transportation methods:  |  |  |   |
| 2   | <input type="checkbox"/> Bus <input checked="" type="checkbox"/> Rail <input type="checkbox"/> Other Method <input type="checkbox"/> Vanpool |  |   |
| 3   | Civilian/Military: <input type="text" value="CIVILIAN"/>   | 4  | Work Status: <input type="text" value="Full Time"/> |
| <p>Always follow your Agency work schedule policy for specific guidance on the Days per Month entry.</p> <p>Defined work schedule examples:<br/>                     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<br/>                     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<br/>                     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<br/>                     If you telecommute or work part time, enter the number of days you actually commute to/from work.</p>   |  |  |   |
|   |  | 2(b)   | 2(c)  |
|   |  | 2(d)   |   |
| Method of Transportation  | Daily Expense  | Days per Month   | Monthly Expense                                     |
| Rail to Work  | Name of Company<br>2(a) <input type="text" value="VRE"/>   | \$ 7.96  | 12  |
| Rail from Work  | Name of Company<br><input type="text" value="VRE"/>  | \$ 7.96  | 12  |
| 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: <input type="text" value="191.00"/> |   |
| TRANSIT BENEFIT PROGRAM APPLICATION   |  |  |   |

- 1) Specify Reason for Certification (i.e., Annual Certification, New Transit Benefit Participant).
- 2) Select your transportation method(s) and enter: (a) Name of Company for method of transportation (b) daily or monthly expense, (c) number of days you routinely work in a month. Complete these steps for every transportation method (i.e., bus and rail) (d) the Total Monthly Expense value automatically calculates.
- 3) Select "Civil/Military" from drop-down menu.
- 4) Select your work status from drop-down menu.



\*Identifier:  5

Name: (Last) (First) (Middle Name)

Email Address:  \*Work Phone:

\*Common Identifier:  6

**DEPARTMENT OF EDUCATION**

\*Select Your Agency/Mode:  7 \*Region:  9

\*Principal Office:  8

Not Applicable to ED Employees:  [Select...](#)

Not Applicable to ED Employees:  [Select...](#)

Not Applicable to ED Employees:  [Select...](#)

I certify that my usual **monthly Transit commuting costs** are:  10

**WORK INFORMATION** 10

\*Work Address:

\*Work City:  \*Work State:  \*Work Zip:

**RESIDENCE INFORMATION**

\*Address:

\*City:  \*State:  \*Zip:

\*Approving Official:  [Select...](#) \*Point of Contact:  [Select...](#)

\*Manager/Fund Certifier:  [Select...](#) Manager Phone:

\*SmartTrip Card Number:  14

Comment for Agency Approvers:

11

12

13

15

5) Enter the last 4 digits of your Social Security number in the “Identifier” box.

6) Enter the word “Education” in the “Common Identifier” field.

7) Select your Agency/Mode

8) Select your Principle Office

9) Select your Region

10) Enter work information

11) Enter Residence information

12) Select Approving Official **EXCUTIVE OFFICERS LIST (APPROVING OFFICIAL LIST)**(see pg. 25)

13) Enter Manager/Fund Certifier as “ED TRANSIT BENEFIT COORDINATOR”

14) Enter SmarTrip® card number to participate in Smart Benefits. Enter “NA” to participate in TRANServe Debit card benefits. Please see reference next page for more information.

15) Indicate split benefits. For example; enter “I would like my benefits split in the following:  
 TRANServe Debit card: \$100  
 Smartrip: \$25



**NOTE:** Use chart below to identify your Smartrip Card type and enter circled number portion into 14) “Smartrip Card Number” field.



## SMARTrip Card Type

Please indicate the type of your card by matching the serial number on the back of your card with the pattern that is circled on the images below.

|  |  |
|--|--|
| <p>Card Type #1: <input type="radio"/></p> | <p>Use return to: WMATA, 600 Fifth Street, N.W.<br/>D.C. 20001</p> <p>SmartTrip® and SmartBenefits® logos<br/>are trade/service marks of WMATA.</p> <p>012345678 C3DW803</p> <p>serial number</p>                  |
| <p>Card Type #2: <input type="radio"/></p> | <p>Use return to: WMATA, 600 Fifth Street, N.W.<br/>D.C. 20001</p> <p>SmartTrip® and SmartBenefits® logos<br/>are trade/service marks of WMATA.</p> <p>012345678 3 C3DW803</p> <p>serial number      check sum</p> |
| <p>Card Type #3: <input type="radio"/></p> | <p>Use return to: WMATA, 600 Fifth Street, N.W.<br/>D.C. 20001</p> <p>SmartTrip® and SmartBenefits® logos<br/>are trade/service marks of WMATA.</p> <p>C3DW017 0020 0001 5644 364 6</p> <p>serial number</p>       |
| <p>Card Type #4: <input type="radio"/></p> | <p>Use return to: WMATA, 600 Fifth Street, N.W.<br/>D.C. 20001</p> <p>SmartTrip® and SmartBenefits® logos<br/>are trade/service marks of WMATA.</p> <p>GD1137 0167 0693 4564 7992 9601</p> <p>serial number</p>    |



## TRANServe Debit Card



Here's how the TRANServe Debit Card works

1. All cards are delivered to the Transportation Services Branch, upon receipt of the card you will be notified via email.
2. Receive TRANServe Debit Card.
3. Activate your card by calling Chase Customer Service at 1-866-891-6951. You will need the following information:
  - Work phone number OR use (202-401-2905)
  - Work ZIP code use (20202)
  - Your agency-assigned Common Identifier use (EDUCATION)

*Your transit benefit funds will be electronically deposited to your TRANServe Debit Card on the 10th day of each month.*

4. Select the "Credit" option when purchasing transit fare media.

Any transit benefit funds you do not use by the end of the 9th day of the following month will be credited back to Education.



## Debit Card User Account Website

JPMorgan has updated its [website](#) to better serve Transit Benefit Program Participants.

“My Account” is now “UCard Center”.

UCard Center gives you much more control over your TRANServe Debit Card account.

Now you can:

- ACTIVATE your TRANServe card
- REQUEST a replacement card
- DOWNLOAD program training materials
- VIEW your pending transactions

[Check it out to learn more!](#)

- VISIT [https://ucard.chase.com/locale.action?request\\_locale=en](https://ucard.chase.com/locale.action?request_locale=en) to go to the new UCard Center
- REGISTER for UCard Center by creating a new User ID and password
- SAVE to your Favorites.
  - DELETE the old “My Account”
  - SAVE the new “UCard Center” to your favorites

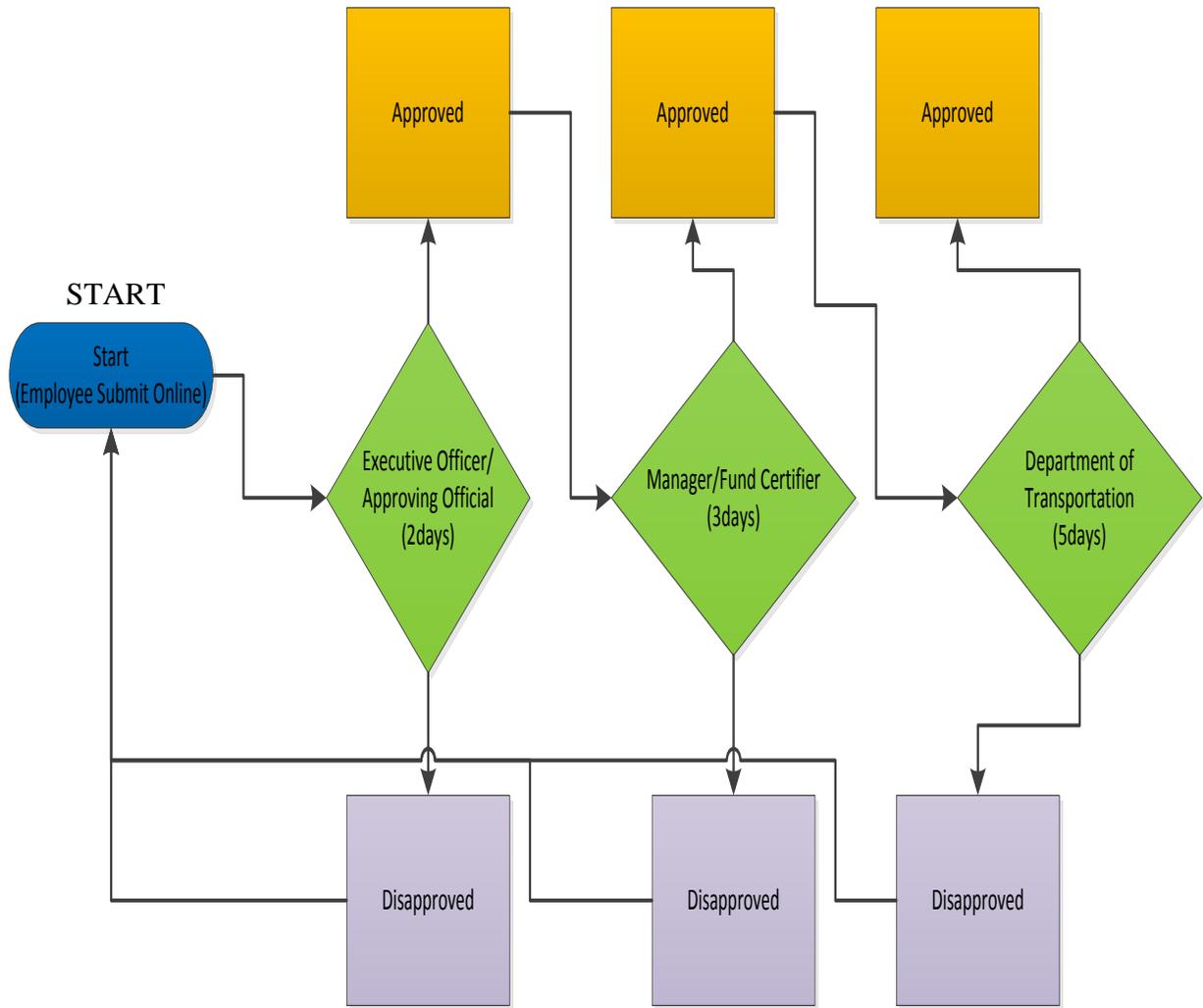
This step-by-step guide will assist you in the transition [JPMorgan UCard Center Registration Steps](#)

**It's easy, safe, and convenient!**



## 3 APPLICATION APPROVAL PROCESS (FLOWCHART)

- SMARTRIP Card: Processing Timeframes - 10 business days, funds will auto-load onto card electronically (if applications are received and approved by DOT).
- TRANServe Debit Card: Processing Timeframes - Debit Cards - up to 15-30 business days to receive the card in hand.





## 4 EXECUTIVE OFFICERS LIST (APPROVING OFFICIAL LIST)

| <b>EXECUTIVE OFFICER LISTING</b>              |  |           |                 |             |                |
|---|--|-----------|-----------------|-------------|----------------|
| <b>Name</b>                                   | <b>Assistant</b>   | <b>PO</b> | <b>Building</b> | <b>Room</b> | <b>Phone</b>   |
| Linda Stracke, Dir,<br>Exec Mgmt Staff        | Mitchell Dedert<br>Administrative Officer                                    | OS        | LBJ             | 7E103       | (202) 401-3085 |
| LaVerne Chester,<br>Administrative<br>Officer |  | ODS/OUS   | LBJ             | 7E203       | (202) 401-5937 |
| Brenda Long,<br>Administrative<br>Officer     |  | OPEPD     | LBJ             | 7E201       | (202) 205-3697 |
| Laurie Meier,<br>Administrative<br>Officer    |  | OCO       | LBJ             | 7C157       | (202) 401-0422 |
| Paula Shipp,<br>Administrative<br>Officer     |  | OGC/OLCA  | LBJ             | 6W336       | (202) 205-5203 |
| Diedre L. Windsor                             | Monique Lewis  | OCR       | LBJ             | 4E305       | (202) 453-5512 |
| Teresa Clark                                  |  | OIG       | PCP             | 8159        | (202) 245-6340 |
| <i>Gale Hoes</i>                              |  | OIG       | PCP             | 8109        | (202) 245-7002 |
| Andrew Pepin (A)                              | Susan Wilbur/Darlene<br>Thornton/(Melanie<br>Winston for Monthly<br>Reports) | OSERS     | PCP             | 5106        | (202) 245-7632 |
| Michael Holloway                              | Holly Williams<br>(Monthly Reports only)                                     | OCFO/OCIO | PCP             | 6090        | (202) 245-8150 |
| Wanda Davis                                   | Jeanie Banks   | OM        | LBJ             | 2W227       | (202) 401-5931 |
| Tameka Richardson                             | Yvonne Watkins   | FSA       | UCP             | 21C4        | (202) 377-3901 |
| Daniel Miller                                 | Kristina<br>Letourneau/Yvonne<br>Navalaney/Kristin<br>Harris/Lauren Williams | OPE/OCTAE | PCP             | 11129       | (202) 245-7777 |
| Tina Hunter                                   | Alda Giusti  | OESE/OELA | LBJ             | 3E310       | (202) 260-2526 |
| Leontyne (Tina)<br>Minor                      | Angela Miles   | IES/NCES  | CP              | 602H        | (202) 219-1466 |
| Liza Araujo                                   | Tawanna Coles  | OII       | LBJ             | 4W333       | (202) 260-4008 |
| Tracy Jones                                   |  | ACSFA     | CP              | 413         | (202) 219-2099 |
| Munira Mwalimu                                | Mary Crovo   | NAGB      | NC              | 825         | (202) 357-6906 |