

**Transportation Subsidy Program  
Annual Recertification  
Transportation Subsidy Coordinator Checklist**

Washington, DC National Capital Region (NCR) and Denver Property Management, Bureau of  
Reclamation, Transportation Subsidy Program Coordinators

Pre-Recertification Assignments

1) **BRIEFING MEETING**

- a) If you have not already done, please schedule a briefing meeting with Regional Transportation Subsidy Program Coordinators/Points of Contact/ Fare Media Distributors – Outside of the National Capital Region (ONCR).
- b) Shutdown Furlough (excepted and released employees/participants) – Standard Operating Procedures on how to handle.
- c) Interns and Transit Subsidy.
- d) Performing audits and de-enrolling – Standard Operating Procedures.
- e) New Transit Coordinators – Standard Operating Procedures.
- f) New Participants – Standard Operating Procedures.

2) **COMMUNICATION**

- a) There are bureaus/offices specific deadlines December 2 & December 16, 2013.
- b) Digital signage and poster boards should be displayed at all worksites.
- c) Post signage during the Recertification Period: October 22, 2013 – December 16, 2013.
- d) Signs at the Main Interior/South Interior Buildings will be managed by the NCR Transportation Subsidy Program, Program Manager.
- e) Signs for other NCR sites will be forwarded by FedEx. Lastly NCR/ONCR points of contact will receive a JPEG announcement – to reproduce a poster or to produce digital signage.
- f) NOTE: Posters will be mailed out later this week to the NCR Transit Coordinators only. Please email your mailing address to Dante Jeffries, ([dante\\_jeffries@ios.doi.gov](mailto:dante_jeffries@ios.doi.gov)) not later than **close of business 10/23/2013**.
- g) Notify Transportation Subsidy Program applicants of the Annual Recertification period: October 22, 2013 – December 16, 2013.
- h) \*Please note, due to the Shutdown Furlough Recertification the first recertification deadline has been changed; however it is essentially 45 days. However the second recertification deadline will remain on December 16, 2013.

3) **COORDINATOR RESOURCES**

- a) NCR refer your counterparts Outside of the National Capital Region (ONCR), to the coordinator resource section of the [Annual Transit Subsidy Recertification website](#).
- b) Transportation Subsidy Program Recertification Announcement – Due to regional and bureau/offices delays in receipt of LAN Message notification, NCR please forward to your counterparts the notification. I will forward to you as well.
- c) Recertification Schedule (Coordinators) – Contains Coordinators email addresses with schedule.
- d) Recertification Schedule (Participants) – Contains an at-a-glance view of schedule.
- e) Transportation Subsidy Program Coordinator – Annual Recertification Checklist.
- f) Recertification Statement Form – NOTE the dates on the Recertification Statement are from October 1 through December 31. (Rather than remove this statement and then reload to the website, the dates have remained, as stated in our earlier recertification meeting.)

- 4) Identify the due date for receipt of the regional points of contact Recertification Spreadsheets. Please note, this year you will submit only **one** complete Recertification Spreadsheet for each of the two deadline dates. However in some cases, you will have to submit the Recertification Spreadsheet immediately, e.g., new de-enrollments, new subsidy changes, new applicants, all participants have completed recertification requirements etc.

- 5) Encrypt all electronic files containing PII before emailing between DOI-DOI (internal) and DOI-DOT (external).

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- 6) NCR communicate the recognized password to your ONCR counterpart.
- 7) ONCR Transit Coordinators should carbon copy their NCR Transit Coordinator or Denver Property Management, Bureau of Reclamation when their submitting their final spreadsheets to the Department of Transportation. NOTE: This is subject to NCR Transit Coordinator or Denver Property Management, Bureau of Reclamation requirements. Some NCR Coordinators prefer to send to DOT on behalf of their bureau/office.
- 8) Refer Participants to the [Annual Transit Subsidy Recertification website](#). This webpage to keep abreast of important dates, changes and/or obtain information, e.g., forms, FAQs, Transit Benefit Integrity Awareness Training links, etc.:
  - a) [http://www.doi.gov/ofas/support\\_services/transportation\\_subsidy\\_recert.cfm](http://www.doi.gov/ofas/support_services/transportation_subsidy_recert.cfm)
  - b) [http://www.doi.gov/ofas/support\\_services/transportation\\_subsidy.cfm](http://www.doi.gov/ofas/support_services/transportation_subsidy.cfm)
- 9) Review DOT Recertification Spreadsheet. Then de-enroll (scrub) **all inactive participants immediately**.
- 10) Complete all participant audits - DOT TRANSIT PROGRAM FINDINGS - 09242013 - Copy of Participants in system but not active.xlsx. Submit findings to the NCR Transit Coordinator; then the NCR should forward the combined findings to Michellé D. Howard-Hanson ([michelle\\_howard-hans@ios.doi.gov](mailto:michelle_howard-hans@ios.doi.gov)). **Please forward your feedback to by the close of business, Friday November 1, 2013.**

**ALL Transportation Subsidy Program Coordinators**

**New Applicant/Existing Applicant Verification**

- 1) Verify Transportation Subsidy Benefit and Annual Pass Participants applications disclose/provide all information required, e.g., employee's home address (including the street name), employee's work address, employee's commuting cost breakdown is completed on the Expense Worksheet.
- 2) Request a print out of the travel plan(s)/Expense Worksheet and cost for each transit authority the employee identifies as his/her mode of transportation.
- 3) Ensure supervisor or person of authority signs the application verifying costs were reviewed for reasonableness.
- 4) Ensure funds approving official certifies funds are available.
- 5) Place the names of these new eligible participants onto the appropriate sheet.
- 6) Fill-in the spreadsheet as the Department of Transportation has requested. See *Instructions for Completing the Application Submission Forms* page on the DOT Master Spreadsheet.
- 7) Submit complete spreadsheets to Tracy Harpold ([Tracy.Harpold@dot.gov](mailto:Tracy.Harpold@dot.gov)), Melanie Buck ([Melanie.Buck.CTR@dot.gov](mailto:Melanie.Buck.CTR@dot.gov)) at the Department of Transportation and NCR and/or Denver Property Management, Bureau of Reclamation, Transportation Subsidy Program Coordinator. There are two submission options, to consider:
- 8) Encrypt all electronic files containing PII before emailing between DOI-DOI (internal) and DOI-DOT (external).
- 9) Use recognized password when submitting files to the Department of Transportation.
- 10) Print-out final electronic DOI Learn *Transit Benefit* report and maintain for your records. (Washington, DC National Capital Region (NCR) Coordinators/ Denver Property Management, Bureau of Reclamation will forward to the regions.) However if the applicant is a new employee, then request a copy of their copy of their Transit Integrity Training Certificates
- 11) Maintain a Fiscal Year 2014 Recertification Binder, with the following Transportation Subsidy Program records, e.g., Transit Integrity Training Certificates if necessary, the Recertification Statement (for applicants with no changes), final Recertification Master Spreadsheets from all regions (if applicable) and the final electronic

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DOILearn *Transit Benefit* report.

- 12) Department of Transportation Master Spreadsheets Completion.
- 13) Fill-in the Recertification spreadsheet as requested by the Department of Transportation. See Instructions for Completing the Application Submission Forms page on *DOT Master Spreadsheet*.
- 14) Submit complete spreadsheets to Tracy Harpold ([Tracy.Harpold@dot.gov](mailto:Tracy.Harpold@dot.gov)), Melanie Buck ([Melanie.Buck.CTR@dot.gov](mailto:Melanie.Buck.CTR@dot.gov)) at the Department of Transportation and your Washington, DC National Capital Region and/or Denver Property Management, Bureau of Reclamation, Transportation Subsidy Program Coordinator.
- 15) Again please encrypt all electronic files containing PII before emailing between DOI-DOI (internal) and DOI-DOT (external).
- 16) Recommendation – Use the existing password recognized between DOI Washington, DC National Capital Region (NCR) Coordinators/ Denver Property Management, Bureau of Reclamation and Department of Transportation Transit Benefit Program Manager, Tracy Harpold.
- 17) Use recognized password when submitting files to the Department of Transportation.
- 18) If an ONCR Coordinator, carbon copy, Washington, DC National Capital Region and Denver Property Management, Bureau of Reclamation, Transportation Subsidy Program Coordinators on spreadsheet submissions to the Department of Transportation.
- 19) If ONCR Coordinator submits total recertified participants to Washington, DC National Capital Region and Denver Property Management, Bureau of Reclamation, Transportation Subsidy Program Coordinators at the conclusion of each regional end date; then the NCR will forward their bureau/offices totals to Michellé D. Howard-Hanson ([michelle\\_howard-hans@ios.doi.gov](mailto:michelle_howard-hans@ios.doi.gov)) at the end of each recertification period.
- 20) The last submission date for all Recertification documents to Department of Transportation should be Monday, December 16, 2013.
- 21) **NOTE:** If applicant is a new enrollee to the Transit Subsidy Benefit and Annual Pass programs or the applicant has changes e.g., new account code structure number, new supervisor or office, new or modified mode(s) of transportation, increase/decrease in transportation commuting costs, follow regular business practices and forward a revised Application, Expense Worksheets, etc. to Washington, National Capital Region Coordinator and/or Denver Property Management, Bureau of Reclamation counterpart, in addition to the electronic files.

**Recertification Checklist**

- a) De-enroll inactive participants.
- b) Complete bureau/office audits.
- c) Ensure ALL Transit Subsidy Benefit and Annual Pass Participants recertify.
- d) Ensure completion of the *Recertification Statement* and maintain copy for your records.
- e) Verify completion of *Transit Benefit Integrity Awareness Training*.
- f) Complete Master Spreadsheets, as per Department of Transportation spreadsheet instructions.
- g) Submit Annual Recertification Spreadsheet at the conclusion of your bureau/office specific deadline to the Department of Transportation. (See [Recertification Schedule](#) to determine your bureau/office deadline date.)
- h) NCR Coordinator submits total recertified participants to Michellé D. Howard-Hanson by the close of each bureau/office recertification deadline.
- i) Maintain a Fiscal Year 14 Recertification Binder, with the following Transportation Subsidy Program records, e.g., Integrity Training Certificates if necessary, the Recertification Statement (for applicants with no changes), final Recertification Master Spreadsheets from all regions and the final electronic DOILearn *Transit Benefit* report.
- j) Print-out final electronic DOILearn *Transit Benefit* report at the end of recertification and maintain for your Records. (However if participant did not complete training through the online portal, they MUST provide a copy of the *Integrity Awareness Training Certificate of Completion*.)

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- k) **NOTE:** ALL Transportation Subsidy Program Coordinators will receive an electronic DOI Learn Transit Benefit Report (*Transit Benefit Integrity Awareness Training Course*) report once weekly - Wednesday.
- i) Washington NCR Transportation Subsidy Program Coordinators and Denver Property Management, Bureau of Reclamation will forward these reports to your Regional Coordinators/Points of Contact & Fare Media Distributors.
  - ii) Use these reports to verify participant completion of training requirements.
  - iii) As long as the training event occurs during the Recertification period, participants will not have to provide a copy of their *Transit Benefit Integrity Awareness Training Certificate*. (Subject to NCR requirements.) The electronic report serves as proof of completion. However, the participant **MUST** provide a certification of completion if it is a requirement or process of your Bureau/Offices.
  - iv) If participant did not complete training through the online portal, they **MUST** provide a copy of their *Integrity Awareness Training Certificate of Completion*.
  - v) Participants **MUST** maintain a copy of the *Transit Benefit Integrity Awareness Training Certificate* for their records.