

**For:** All FSA and RMA Offices except the National Office

**Implementing the Transit Subsidy Benefit Outside the National Capital Region (NCR)**

**Approved by:** Deputy Administrator, Management



**1 Overview**

**A**

**Background**

Effective October 1, 2000, Executive Order 13150 requires all Federal agencies to provide to employees that use mass transportation or qualified commuter vehicles commuting to and from work, a:

- Direct Transit Subsidy Benefit for employees in NCR
- Pre-Tax Transit Subsidy Benefit for employees in locations outside NCR.

The subsidy will assist employees with their transportation costs.

USDA agencies have the discretion to offer the full Direct Transit Subsidy Benefit, in-lieu-of the Pre-Tax Transit Subsidy Benefit, up to \$65 per month to all qualifying employees regardless of location.

**Note:** Parking benefits authorized under 26 USC132(f) are not being implemented at this time.

The Department of Transportation (DOT) will administer the Transit Subsidy Benefit for USDA agencies.

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<b>Disposal Date</b>  February 1, 2001	<b>Distribution</b>  All FSA and RMA Offices except the National Office
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## Notice AS-2020

### 1 Overview (Continued)

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#### B

##### Purpose

This notice:

- informs employees about Executive Order 13150 allowing employees outside NCR to receive a Direct Transit Subsidy in-lieu-of the Pre-Tax Transit Subsidy, on or after October 1, 2000
  - provides information and instructions on administering and applying for the Direct Transit Subsidy benefit.
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#### C

##### Definitions

Direct Transit Subsidy means the Agency establishes an account at the headquarters level for the actual Agency Direct Transit Subsidy cost, plus overhead and voucher distribution costs.

Pre-Tax Transit Subsidy means the employee's pre-tax income is reduced by an amount equal to their transit or vanpool expenses up to \$65 per month, or the actual cost, if less. In this case, the Agency would accumulate these withholdings and purchase fare media cards/vouchers on behalf of the employee, and distribute the fare media directly to the participating employees.

Mass transportation is private or public transportation systems such as buses, subways, rail, streetcars, trolleys, and ferries operated for the benefit of the general public.

Qualified commuter highway vehicle is any highway vehicle (including commuter bus and van pools) with a seating capacity of at least 6 adults, not including the driver. At least 80 percent of the total mileage use of this vehicle can reasonably be expected to be for purposes of transporting persons in connection with travel between their residences and their place of employment. During these trips passengers will number at least ½ of the adult seating capacity, **not** including the driver.

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## 2 Program Guidelines

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### A

#### Eligibility Requirements

All full-time, part-time, and intermittent employees are eligible for the Direct Transit Subsidy if they use 1 of the following modes of transportation as their normal method for commuting to and from work:

- a mass transportation system
- qualified commuter highway vehicle.

**Note:** Carpools are excluded under the Direct Transit Subsidy Benefit.

Employees must complete AD-2004 (Exhibit 1) and forward to the appropriate contact person in subparagraph 3 D, when their normal method of commuting changes for more than 2 weeks.

Following are examples of commuting changes that require an employee to complete a new AD-2004:

- driving alone to the workplace
  - being on temporary duty at another workplace
  - being on leave.
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### B

#### Transit Allowance

FSA and RMA have established an allowance of \$65 per month, or the actual transportation costs, if less, for employees eligible to receive the transit subsidy.

The allowance will be provided to employees as 1 of the following:

- a fare media card
- voucher
- cash reimbursement.

**Note:** Cash reimbursements will be provided in locations where:

- vouchers are not readily available
- DOT needs additional time to contact local transportation companies.

County Offices with employees receiving cash reimbursements for the Transit Subsidy shall contact FMD for instructions for making cash reimbursements.

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**Notice AS-2020**

**2 Program Guidelines (Continued)**

**B  
Transit  
Allowance  
(Continued)**

Employees receiving cash reimbursements shall complete SF-1164 and submit to Transit Coordinator. Transit Coordinators shall process SF-1164 according to the following table.

Step	Action
1	<p>Transit Coordinator shall review AD-2004 and SF-1164 to ensure that:</p> <ul style="list-style-type: none"> <li>• the employee is eligible to participate in the program</li> <li>• the amount being reimbursed is within the guidelines for the program</li> <li>• the phrase, "Transit Subsidy - Pay Locally", is clearly printed on SF-1164</li> <li>• the following object class code and accounting codes are entered at the bottom of SF-1164:                             <ul style="list-style-type: none"> <li>• for <b>FSA</b>, enter object code "2570" and accounting code "1840XX84080000"</li> </ul> <p style="margin-left: 40px;"><b>Notes:</b> Replace "XX" with the State code.</p> <p style="margin-left: 40px;">These codes must be listed separately. The codes are meaningless if they are combined.</p> <ul style="list-style-type: none"> <li>• for <b>RMA</b>, enter object code "2115" and the Cost Center's assigned accounting code.</li> </ul> </li> </ul>
2	Transit Coordinator shall initial approved SF-1164's and send to office head for final approval and signature.
3	Office head shall sign approved SF-1164 on line 8 and send to the employee responsible for processing convenience checks. For example, for FSA State Offices this may be someone on the Administrative Officer's staff or for RMA the Office Assistant.
4	<p>The purchase card holder shall process the convenience checks and do <b>both</b> of the following:</p> <ul style="list-style-type: none"> <li>• send the check to the employee</li> <li>• provide a copy of the accomplished SF-1164 with the check number and paid date noted in block 5 to the Transit Coordinator.</li> </ul>
5	Transit Coordinator shall file the copy of SF-1164 with the employee's approved AD-2004.

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## Notice AS-2020

### 2 Program Guidelines (Continued)

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#### **B Transit Allowance (Continued)**

Fare media cards and vouchers will be issued on a quarterly basis with the first disbursement to be made **around October 1**. The Transit Coordinator at each location will inform employees of future disbursement dates.

**Note:** Within any month, an employee's fare media cards or voucher usage may not exceed the amount claimed (\$65 or the actual cost, if less).

Direct Transit Subsidy benefits are **not** retroactive.

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### 3 Action

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#### **A Employee**

Employees who qualify according to subparagraph 2 A, shall complete AD-2004 (Exhibit 1) and submit to Transit Coordinator (see subparagraph D) who will forward to HRD.

Employee shall refer to subparagraph 2 A if normal commuting method changes for more than 2 weeks.

AD-2004 can be obtained from FFAS Forms Online at [www.fsa.usda.gov/dam/forms/fsaforms.asp](http://www.fsa.usda.gov/dam/forms/fsaforms.asp).

Employees who previously applied for the Pre-Tax Subsidy through HRD do **not** need to reapply to receive the Direct Transit Subsidy. AD-2004 will be processed as a Direct Transit Subsidy in-lieu-of a Pre-Tax Transit Subsidy.

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**Notice AS-2020**

**3 Action (Continued)**

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**B  
Field Office  
Transit Subsidy  
Coordinator**

Coordinators shall:

- maintain contact with the USDA DOT Team Leader (see subparagraph C) in an effort to carry out the Direct Transit Subsidy benefit
- respond to employees inquiries about the subsidy
- review and approve or disapprove AD-2004
- notify individual employee of eligibility status
- make a copy of AD-2004 before forwarding to HRD
- forward AD-2004's to Juliet D. McBride, HRD by either of the following methods:
  - regular mail to:  
  
JULIET D. MCBRIDE  
USDA/FSA/HRD  
1400 INDEPENDENCE AVE, SW, STOP 0595  
WASHINGTON, DC 20250
  - Federal Express to:  
  
JULIET D. MCBRIDE  
2100 L STREET, NW, ROOM 5200  
WASHINGTON, DC 20037
- issue fare media cards and vouchers.

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3 Action (Continued)

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**C**

**USDA DOT  
Team Leader**

USDA DOT Team Leader is Alice Allen she can be reached by:

- email to Alice.Allen@tasc.dot.gov
- telephone at 202-366-0580.

The Team Leader shall:

- by October 1, contact all Transit Coordinators and provide instructions and information needed to administer the Direct Transit Subsidy
- be the primary resource person for answering questions, collecting applications, and issuing fare media cards and vouchers to Transit Coordinators.

**Note:** If you cannot obtain assistance in a timely manner contact Janet Krause at 202-366-0815.

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**D**

**FSA and RMA  
Office Heads**

All office heads shall:

- designate a Transit Coordinator at all locations where there are employees who are eligible for the subsidy
- provide employees the name and telephone number of the Transit Coordinator for their location
- email Juliet McBride, HRD, at juliet\_mcbride@wdc.fsa.usda.gov with the transit coordinator's name, office address, telephone and FAX numbers, and email address

**Note:** HRD will provide this information to DOT.

- administer the subsidies requiring cash reimbursements.
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## Notice AS-2020

### 4 Availability of Funds

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#### A Program Continuation

All employees should be aware that continuing the Direct Transit Subsidy benefit is dependent on available funds within the FSA and RMA budgets. FSA and RMA will review the availability of funds as part of its annual budget process. If a change is warranted, FSA and RMA will provide employees and exclusive representatives with advance notification.

FSA and RMA reserve the right to suspend the subsidy upon the announcement of reduction-in-force or furlough actions that may be necessitated by budget or ceiling constraints or other constraints beyond the control of FSA and RMA.

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### 5 Contacts

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#### A HRD Contact

Field office heads and transit coordinators shall contact Juliet D. McBride, HRD, Performance Management, Benefits, and Awards Branch, at 202-418-9029, if there are questions about this notice.

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#### B Employee Contact

Employees shall contact their office head, if there are questions about this notice.

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Example of AD-2004

U.S. DEPARTMENT OF AGRICULTURE  
PUBLIC TRANSPORTATION BENEFIT PROGRAM APPLICATION  
(Please type or print legibly in blue or black ink)

USDA Agency Code (For example: DA for Departmental Administration): \_\_\_\_\_

**A. Applicant Information (Please Print or Type):**  
 Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI: \_\_\_\_\_  
 Home Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Work Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Work Telephone Number: \_\_\_\_\_ SSN: \_\_\_\_\_

Prior to applying for this benefit, did you drive to work or use some form of mass transit? \_\_\_\_\_

**B. Modes of Transportation to be used to and from workplace:**  
 Please provide the name of the transit company/system that you use in the space below:  
 Bus \_\_\_\_\_ Light Rail \_\_\_\_\_ Subway \_\_\_\_\_ Train \_\_\_\_\_ Ferry \_\_\_\_\_  
 Authorized \*Commuter Highway Vehicle(Vanpool) \_\_\_\_\_ Other (explain) \_\_\_\_\_  
 \*Any highway vehicle with a seating capacity of at least 6 adults (not including the driver). At least 80 percent of the total mileage use of this vehicle can reasonably be expected to be for purposes of transporting persons in connection with travel between their residences and their place of employment. During these trips passengers will number at least 1/2 of the adult seating capacity (not including the driver).

Please provide the specific type of fare/media you use (e.g. ticket, pass, token, etc.): \_\_\_\_\_

**C. Employee Certification:**  
 WARNING: This certification concerns a matter with the jurisdiction of an agency of the United States and making a false, fictitious, or fraudulent certification may render the maker subject to criminal prosecution under title 18, United States Code, Section 1001, Civil Penalty Action, providing for administrative recoveries of up to \$10,000 per violation, and/or agency disciplinary actions up to and including dismissal.

I certify that I am employed by the Department of Agriculture.  
 I certify that I am eligible for a public transportation fare benefit, will use it for my daily commute to and from work, and will not give, sell, or transfer it to anyone else.  
 I certify that the monthly transit benefit I am receiving does not exceed my monthly commuting costs.  
 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 monthly 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 my usual monthly commuting costs are: \$ \_\_\_\_\_

Employee **Original** Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**D. Transit Subsidy Coordinator:**  
 Name: \_\_\_\_\_ Title: \_\_\_\_\_  
 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

PRIVACY ACT STATEMENT: This information is solicited under authority of Public Law 101-509. Furnishing the information on this form is voluntary, but failure to do so may result in disapproval of your request for a public transit fare benefit. The purpose of this information is to facilitate timely processing of your request, to ensure your eligibility, and to prevent misuse of the funds involved. This information will be matched with lists at other Federal agencies of Government-assigned parking to ensure consistency with mode of transportation checked.

AD-2004 (09-05-00)