

3 FAM 3810 TRANSIT BENEFIT PROGRAM

(CT:PER-559; 07-07-2005)
(OFFICE OF ORIGIN: HR/ER)

3 FAM 3811 GENERAL INFORMATION

(CT:PER-559; 07-07-2005)
(State only)
(Foreign Service and Civil Service employees)

- a. On April 21, 2000, President Clinton signed Executive Order 13150 mandating Federal agencies provide transportation benefits to encourage mass transportation and expand commuting alternatives to qualified Federal employees no later than October 1, 2000.
- b. This program is otherwise known as Metrochek Program.
- c. The Metrochek program is an employer-sponsored program that allows employers to purchase Metrocheks, which can be exchanged for fare card vouchers. They are available in \$1, \$5, \$10, \$20 and \$30 denominations and can be used as is for the Metrorail system or can be exchanged unused for any of the transit systems in the National Capital Region.
- d. The Bureau of Resource Management (RM) finances the Department's Metrochek program. Each year the Department of State (DOS) and the Department of Transportation (DOT) enter into an Office of the Secretary of Transportation (OST) Customer Agreement where DOS has agreed to reimburse DOT for the Metrochek Program. RM is reimbursed by other the bureaus for their share of the Metrochek expenses.

3 FAM 3812 ELIGIBILITY

(CT:PER-559; 07-07-2005)
(State only)
(Foreign Service and Civil Service employees)

- a. The following employees are eligible for transit benefits:
 - (1) All direct-hire (including part-time) are eligible to participate.
 - (2) Other eligible categories are:
 - (a) When Actually Employed (WAE);
 - (b) Presidential Management Fellows (PMFs);

- (c) Student Employment Program (STEP);
 - (d) Co-Ops; Stay-in-Schools;
 - (e) Pre-assignment Centers (PACs); and
 - (f) Paid and unpaid Interns. Employees are eligible to participate in the program if they are direct-hire State Department employee assigned to a position domestically. This is true if the employee is a full-time, part-time, or WAE employee. Effective January 24, 2003, unpaid student interns may also participate in the Department's transit subsidy program.
- b. The following employees are not eligible for transit benefits:
- (1) Contractors (e.g., PSC and NPSC);
 - (2) Employees in the U.S. on temporary duty for periods of less than 12 weeks (who would not be expected to have personal vehicles available for transportation for such short periods of time); and
 - (3) Employees who have received a parking permit from the State Department, except for vanpool operators as defined below.

3 FAM 3813 OBJECTIVE

(CT:PER-559; 07-07-2005)

(State only)

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- a. The objective of this program is to encourage employees to use public transportation for commuting to and from work on a regular, ongoing basis. If the employee uses public transportation on an occasional or sporadic basis, she/he would not qualify for enrollment in this program.
- b. Although Federal employees serving overseas are not explicitly excluded from the Executive Order, the focus and intent of the mandate and the background legislation are to alleviate traffic pollution and congestion on U.S. roads and highways. Therefore, the new transit benefit is limited to State Department employees assigned domestically.
- c. The focus of the program and the intent of the legislation are to alleviate traffic pollution and congestion on U.S. roads and highways. Those assigned for training for periods of less than 12 weeks are expected to take public transportation.

3 FAM 3814 MANAGEMENT OF THE TRANSIT SUBSIDY PROGRAM

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- a. Three parties are involved in making the "transit subsidy program" work:
 - Department of State (through the Bureau of Human Resource, Office of Employee Relations, Employee Programs (HR/ER/EP) and the Transit Coordinators outside of the National Capital Area)
 - Department of Transportation
 - Local transportation provider in your area
- b. The Transit Program Coordinator, Office of Employee Relations, Employee Programs Unit serves as State's principal liaison with DOT, provides policy guidance to employees, troubleshoots problems that may arise, and monitors internal controls.
- c. The Department of Transportation Administrative Service Center (TASC) is a non-profit, fee-for-service support organization. TASC has an experienced staff with expertise in managing transit programs nationwide for 15 other Federal agencies. TASC:
 - Maintains a current data base of eligible employees who have applied for fare cards
 - Serves as liaison with local transportation providers purchases and arranges distribution of fare cards for employees
- d. Local transportation providers sell fare media to the Department of Transportation.

3 FAM 3815 MAXIMUM VALUE OF TRANSIT SUBSIDY PROGRAM

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(State only)

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The maximum amount an employee can receive, as a tax-free benefit is \$105 per month. This program is intended to cover only actual commuting costs to and from work incurred by the employee each month. In other words, if the employee's commuting costs were \$45 per month, the employee would apply for that amount. If the employee's commuting costs are \$135 per month, she/he may apply only for the maximum amount, which is lower than the actual cost.

3 FAM 3815.1 Transfer of transit passes

(CT:PER-559; 07-07-2005)

(State only)

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- a. The employee cannot transfer his/her transit pass delivered under this program to anyone else, including family members.
- b. Selling Metrocheks that employees receive through the Department's transit subsidy program may result in the employee being subject to disciplinary action.
- c. When the employee retires, resigns, or are transferred to another location, the employee must return any unused, full-value transit passes to his/her transit coordinator.
- d. Bus tokens and fare cards that have been partially used cannot be returned. If the value of the bus tokens and partially used fare card is significant (e.g. over \$1.00), the employee must reimburse the Department of State for the value by personal check.

3 FAM 3815.2 Recognition of Public Transportation

(CT:PER-559; 07-07-2005)

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- a. To qualify for the program, the employee must use a transit system or vanpool that is part of, or registered with, a local transit authority as the normal method of commuting to and from work. The Washington Metropolitan Area Transit Authority (WMATA) serves the Washington area. Information about WMATA's program can be accessed through their website.
- b. A list of other major transit authorities nationwide can be accessed on:
 - (1) American Public Transportation Association; or
 - (2) Contact The Bureau of Human Resources, Office of Employee Relations (HR/ER) at Metrochek@state.gov.

3 FAM 3816 HOW TO APPLY

(CT:PER-559; 07-07-2005)

(State only)

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a. Employee:

- (1) The employee must submit the Form DS-3028, Transit Benefit Application Form, application form to his/her supervisor to receive transit benefits. The employee may apply for the benefits at any time. The employee will be placed into a database to receive

monthly or quarterly transit passes.

- (2) The employee is responsible for ensuring that actual expenditures for qualifying transportation expenses match the amount claimed on the application form. If the employee stops using mass transit on a regular basis, he/she is responsible for notifying the HR/ER/EP no later than 5 days after the change. Also, if commuting expenses change to less than the amount previously claimed, the employee must report this on Form DS-3062, Transit Benefit Change Form, the change/withdrawal form. The employee must submit this form through the same procedures described for enrolling in the program. If the employee commuting expenses increase, for example, from \$40 to \$60 he/she may submit a change not to exceed the actual or maximum expense, whichever is less.
- (3) When the employee is transferring from Office to Office or Region-to-Region, she/he is responsible for completing Form DS-3062 to report the change. This requirement exists even if the employee's commuting costs do not change. If the employee's transfer involves a move from one city to another, she/he must complete form DS-3062 to withdraw from participation in the current city and then reapply to participate in the new city.
- (4) While the Department of Transportation manages State Department's participation in the program nationwide, it is necessary for the correct fare media to be offered according to the city where the employee lives and works.

b. Supervisor:

- (1) Supervisors must review applications to verify that the information provided on the application form is correct to the best of the supervisor's knowledge.
- (2) Supervisors may request an employee provide detailed information on the nature and type of employee's method of commuting.
- (3) After approval, the employee must forward the application form to the Transit Coordinator in your region. Transit Coordinators will provide forms to HR/ER/EP, (Room H-236, SA-1) for further processing.

3 FAM 3816.1 Lost Transit pass

(CT:PER-559; 07-07-2005)

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Employees are solely responsible for their transit passes. Transit passes will not be replaced if lost or stolen. Depending on the arrangements with

the employee's local transit provider, transit passes may or may not be replaced if lost or stolen. In the National Capital Region, for example, lost fare cards will not be replaced.

3 FAM 3816.2 How long can I continue to benefit from the transit subsidy program?

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The employee must terminate his/her participation in the program when she/he stops using public transportation on a regular basis or join a car pool. If the employee's commuting costs change to less than what was previously claimed, the employee must report the change on Form DS-3062, Transit Benefits Program Change and Withdrawal Form.

3 FAM 3816.3 SmartBenefits Program

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The SmartBenefits program is a web-based program that lets employers conveniently load the dollar value (amount up to \$105 per month) of an employee's Metro transit (rail and bus), van pool and Metro station parking benefits directly to an employee's SmarTrip card.

3 FAM 3816.4 Vanpools

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- a. Employer and employee operated vanpools, as well as private or public transit-operated vanpools, are defined by 26 U.S.C. 132(f)(5)(B) as a "commuter highway vehicle":
 - (1) The seating capacity of at least 6 adults (excluding the driver); and
 - (2) At least 80 percent of the vehicle's mileage is reasonably expected to be for:
 - (a) Transporting employees between their residences and worksite; and
 - (b) On trips during which the minimum number of daily commuters is at least one-half of the adult seating capacity, excluding the driver.

- b. A typical car-pooling arrangement would not meet this statutory definition, and would not qualify.
- c. Vanpool must be part of, or registered with, the local transit authority.

3 FAM 3817 WHERE TO GET APPLICATION AND CHANGE FORMS

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(State only)

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- a. The employee can obtain blank application or change forms on the HR/ER/EP website or visit HR/ER [see additional information below].
- b. The employee must send or fax his/her completed forms to the Metrochek coordinator, at:

Bureau of Human Resources
Office of Employee Relations (HR/ER/EP)
SA-1 Room H-236
2401 "E" Street N.W.
Washington, D.C. 20522-0102
Telephone: (202) 261-8165 (Ext. 4-8165)
FAX: 202-663-3567 (Ext. 3-3567)

3 FAM 3818 ADDITIONAL INFORMATION

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Please contact Metrochek Coordinator by unclassified e-mail or at (202) 261-8165, if you need further guidance.

3 FAM 3819 UNASSIGNED