

**Functional Series 500 - Management Services  
ADS 515 - Metro Transit Subsidy Program**

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\*Asterisks indicate that the adjacent information is new or revised.

## **ADS 515 - Metro Transit Subsidy Program**

### **515.1 OVERVIEW**

Effective Date: 10/10/2000

This ADS chapter outlines the policy, procedures, and responsibilities for USAID's Metro Transit Subsidy Program. This transportation subsidy program is designed to encourage employees to utilize mass transit to commute to and from work in order to reduce air pollution, noise, and traffic congestion in the metropolitan area.

On September 2, 1999, USAID signed an Inter-Agency Agreement with the Department of Transportation's Transportation Administrative Service Center (TASC) to manage the Transit Subsidy Program. TASC provides liaison with the Washington Metropolitan Area Transit Authority (WMATA, also referred to as Metro) and is responsible for distributing Metrocheks to eligible USAID employees and approved Bureau Personal Service Contractors (PSCs). TASC also orders, verifies, maintains, and safeguards the Metrocheks, and is responsible for any Metrocheks that are lost or stolen prior to disbursement to USAID employees.

### **515.2 PRIMARY RESPONSIBILITIES**

Effective Date: 10/10/2000

- a. The Director, Bureau for Management, Office of Administrative Services (M/AS/OD) is responsible for program planning, implementation, and evaluation of the Metro Transit Subsidy Program.
- b. The Chief, Bureau for Management, Office of Administrative Services, Consolidated Property Division (M/AS/CPD) or his or her designee is responsible for program enrollment, participant subsidy determinations, and program report generation and review. The Chief is also the program liaison with the Department of Transportation.
- c. The Transit Subsidy Program Manager is responsible for overall coordination of USAID's Transit Subsidy Program and for additional responsibilities as directed by the Chief, M/AS/CPD.
- d. Administrative Management Staff (AMS) Officers for each Bureau are responsible for verifying employee eligibility and participation in the program.
- e. Employees are responsible for completing a new application each October, notifying the Transit Subsidy Program Manager of any changes throughout the year, and using the program in accordance with the policies and procedures in this chapter.

### **515.3 POLICY DIRECTIVES AND REQUIRED PROCEDURES**

Effective Date: 10/10/2000

The Transit Subsidy Program offers participants Metrocheks, which are farecard vouchers that can be used to cover the cost of commuting to work on public transit or certain qualifying vanpools. Metrocheks are issued by the Washington Metropolitan Area Transit Authority (WMATA).

Metrochecks are available in five denominations: \$1, \$5, \$10, \$20, and \$30. These different denominations are available to best suit individual transit needs. The \$20 and \$30 denominations have a 10 percent bonus included that can only be exercised when used on the Metrorail System.

Effective January 1, 2002, the maximum amount an employee can receive per month is \$100.

Participants must use the Metrocheks on the Metrorail system or exchange the Metrocheks to other authorized transit providers. Participants are also responsible for safeguarding their Metrocheks. There will be no replacement, redemption, refund, or exchange for lost and/or misplaced Metrocheks.

#### **515.3.1 Transit Subsidy Eligibility**

Effective Date: 09/23/2002

The following USAID employees are eligible for the Transit Subsidy Program:

- a. Direct hires;
- b. Bureau-approved employees under Personal Service Contracts (PSCs);  
and
- c. Full-time or part-time permanent or temporary employees whose terms are one year or more.

\*New eligible employees hired or transferred to USAID/W will be able to participate in the subsidy program provided that their Application for Transit Benefit form is submitted to M/AS/CPD before the 10th of the month. These employees must pick-up the Metrochek benefit on the designated make-up day for that month, as detailed in sections [515.3.3](#) and [515.3.3.3](#). Employees hired and/or transferred to USAID/W after the 15th of the month will begin to receive Metrocheks the following month provided that their Application for Transit Benefit form is submitted by the 25th of the month.

\*The following conditions apply to employees of other Federal agencies working for USAID:

- \*If the parent agency has a transit subsidy program and the employee is eligible for benefits under that program, he or she is NOT eligible to enroll in USAID's program.
- \*If the parent agency does not have a transit subsidy program, the employee can enroll in USAID's program. The employee must certify on the application that that he or she is not eligible for or receiving a public transportation fare benefit from the parent agency.

In addition, employees who wish to enroll in the Transit Subsidy Program must

- a. Not participate in a subsidized carpool with USAID or any other Federal government agency;
- b. Expect to regularly commute, i.e., at least 80 percent of regularly scheduled work days or an average of four to five days per week for full-time employees, via public transportation; and
- c. Be stationed in the Ronald Reagan Building, Washington, DC.

### **515.3.2 Enrolling in the Transit Subsidy Program**

Effective Date: 10/10/2000

The enrollment process involves the following four steps:

- a. Eligible employees complete an [Application for Transit Benefit](#) form (AID 515-1) and deliver it to their AMS Officer.
- b. AMS Officers review, approve, and return the application to the employee, who is responsible for forwarding the application to the Transit Subsidy Program Manager (M/AS/CPD).
- c. The Transit Subsidy Program Manager reviews and processes the application. He or she then forwards the information to TASC.
- d. TASC adds the employee to the participant list.

#### **515.3.2.1 Employee Application**

Effective Date: 10/10/2000

Eligible employees must complete an [Application for Transit Benefit](#) form (AID 515-1).

Employees are subject to disciplinary action for making false statements on the

application.

Employees must notify M/AS/CPD of any changes, i.e., address, name, reassignment within the Agency, etc. These must be in writing.

Employees must deliver the completed application to their AMS Officer for verification and, after AMS approval, deliver the signed application to the Transit Subsidy Program Manager (M/AS/CPD).

**515.3.2.2 AMS Officer Signature**

Effective Date: 10/10/2000

Upon receipt of a completed application for enrollment in the Transit Subsidy Program, AMS Officers must verify employee eligibility for participation in the program. If the employee is eligible, the AMS Officer must sign block #14 of the AID 515-1.

**515.3.2.3 Program Manager Application Processing**

Effective Date: 10/10/2000

The Program Manager reviews new applications for completeness. This includes checking eligibility based on the information provided in the application by the employee and approved by the AMS.

The Program Manager then determines the amount of the subsidy due each participant based upon the individual's estimated monthly commuting costs to and from work. Once complete, the Metrochek Program Manager signs the application, faxes it to the Department of Transportation for prompt processing, and notifies the employee.

The Program Manager keeps a list of all new participating employees.

**515.3.3 Metrochek Distribution to Participating Employees**

Effective Date: 10/10/2000

TASC representatives will dispense the Metrocheks to enrolled USAID employees the first two business days of each month. Participants must pick up their Metrocheks from the TASC representative in the Ronald Reagan Building, 4th floor galley, 1300 Pennsylvania Avenue, NW, Washington, DC. A make-up date is held on the 15th of each month. If the 15th falls on a Saturday, the make-up day is the 14th. If the 15th falls on a Sunday, the make-up day is the 16th. If the distribution date falls on a holiday, Metrocheks will be issued the following workday. No Metrocheks may be picked up after the make-up date.

**515.3.3.1 Agency Notice Announcing Distribution**

Effective Date: 10/10/2000

M/AS/CPD will issue an Agency schedule at the beginning of the year and a monthly reminder announcing Metrochek distribution dates and times.

**515.3.3.2 Monthly Participant Certification**

Effective Date: 10/10/2000

Each month upon receipt of a Metrochek, participants must certify, in writing, the following:

- a. They are eligible for a transit benefit;
- b. They are obtaining it for their commute by public transportation to and from work;
- c. They will not transfer the Metrocheks to any other individual;
- d. The information supplied on their application is current; and
- e. They are using the Metrocheks in accordance with the policies and procedures set forth in this ADS chapter.

**515.3.3.3 Third Party Pick-up**

Effective Date: 09/23/2002

Each employee must personally pick-up and sign for his or her Metrochek.

**Exceptions:**

Assistant Administrators (AAs) and Deputy Assistant Administrators (DAAs) are permitted to have a designee pick-up their Metrocheks, provided that the Third Party Pickup form is completed and signed, with both signatures and the last four digits of the requestor's social security number. The form is to be presented to TASC at the time of pick-up.

This is also true for USAID employees who will be on TDY (official business, annual and/or sick leave). Employees must complete a Transit Benefit/Third Party Pickup Form indicating the details of the TDY (such as dates and place), and the form must be signed by the AMS Officer, requestor, designee, and the Metrochek program manager. **(See Mandatory Reference, [Transit Benefit/Third Party Pickup Form](#))** The designee must present the form to TASC during scheduled distribution days.

\*Employees who are on extended TDY for a total of four weeks or more are not eligible to receive Metrocheks for that time period.

**\*515.3.4 SmartBenefit Program**

Effective Date: 09/23/2002

\*The SmartBenefit Program allows all USAID employees who are eligible for the Metro Transit Subsidy Program to retrieve their transit benefit electronically at any Metro station using a SmarTrip card.

\*Currently employees who travel only by Metrorail may participate in this program. It is anticipated that by the end of 2002 Metro will have installed equipment to accept the SmarTrip card on buses, which will accommodate employees who travel by bus/rail combination.

\*If the employee is currently receiving Metrocheks, he or she must

- Purchase a SmarTrip card by visiting the Metro sales offices at Metro Center, the Pentagon, or Metro Headquarters, or visiting a transit store at Crystal City, Rosslyn, Ballston, Reston, Herndon, Tysons Westpark, White Flint, Springfield, or Silver Spring. A one-time fee of \$5.00 is required to purchase the card;
- Call Metro at (202) 962-5719 to register the card;
- Complete a SmartBenefit application obtainable from M/AS/CPD, Room 4.10A, and attach a copy of the back of the SmarTrip card containing the routing numbers;
- Forward the application to his or her AMS Officer; and
- Send the completed application to M/AS/CPD.

\*Applications received before the 15th of the month will be effective the following month. Applications received after the 15th of the month will not be effective until the month after the following month. During this processing period, employees should continue to pick up their Metrocheks during scheduled distribution times in the 4th floor galley. The Transit Subsidy Program Manager will notify employees by e-mail of the status of their application.

\*If the employee is joining the Transit Benefit Program for the first time and wishes to participate in the SmartBenefit program, he or she must also include the completed form [AID 515-1](#), Application for Transit Benefit.

\*Once the application is processed and approved, employees can use their SmarTrip card at any Metro station to download their approved subsidy amount onto the card. M/AS/CPD issues detailed instructions to employees when they pick up applications.

\*All stolen or lost cards registered with Metro will be replaced by Metro. Any unused

benefit minus the \$5.00 fee for the new card will be credited on your new card.

\*The SmartBenefit program allows employees to download their benefit any time during the month, including weekends. If an employee fails to download the benefit during that time, he or she will lose that month's benefit.

### **515.3.5 Reports and Certification**

Effective Date: 10/10/2000

The Program Manager will review the detailed monthly reports from the Department of Transportation (TASC) to ensure that the information for all participating employees is updated and accurate.

#### **515.3.5.1 Monthly Reports from TASC**

Effective Date: 10/10/2000

The Department of Transportation (TASC) maintains the automated master list of USAID participants. This list is updated as participants join and leave the program. By the 10th of each month, TASC will provide USAID with a detailed report in MS Word containing the following information:

- a. A listing of USAID employees who have obtained Metrocheks, separated by Office/Bureau;
- b. A separate listing of eligible Personal Service Contractors (PSCs) who have obtained Metrocheks;
- c. The date each employee received Metrochek; and
- d. The amount picked-up by each employee.

M/AS/CPD will review these monthly data reports and retain them for record purposes.

The Program Manager will supply a copy of this report to the USAID Parking Coordinator (M/AS/OD) to ensure that employees receiving Metrocheks are not also participating in the USAID subsidized parking program.

#### **515.3.5.2 Quarterly Reports from M/AS/CPD**

Effective Date: 10/10/2000

The Chief of M/AS/CPD or his or her designee must provide a quarterly report to each Bureau and Office AMS Officer.



**515.3.5.3 Annual Re-Certification**

Effective Date: 10/10/2000

M/AS will conduct an annual re-certification process beginning October 1.

**515.3.5.4 Annual Report**

Effective Date: 10/10/2000

M/AS/CPD must complete an annual report by October 15 of each year and deliver it to the M/AS/OD Budget Analyst. The report must contain costs associated with the Transit Subsidy Program and the total cost for Bureau-approved Personal Service Contractors (PSCs).

**515.3.6 Billing**

Effective Date: 10/10/2000

Prior to or on the 25th of each month, TASC will bill USAID for the distribution for the previous month. The invoice will contain the following:

- a. The total amount of Metrocheks issued to USAID employees;
- b. The month and date of distribution and billing period; and
- c. A listing containing the total cost and the name of all USAID employees who picked-up Metrocheks, separated by Bureau.

The bills are paid electronically through Inter-Government Payment & Collection (IPAC). TASC is paid electronically prior to the Program Manager receiving the bill.

Once the Program Manager receives the bill, he or she must check the invoice for discrepancies and make the necessary changes.

Upon completion of the invoice review process, a memorandum will be prepared to the Director, M/AS indicating the distribution status for each month (i.e., number of employees, total amount received). The Program Manager must deliver the memorandum with a copy of the bill.

**515.4 MANDATORY REFERENCES**

**515.4.1 External Mandatory References**

- a. **5 U.S.C. 7905, Programs to encourage commuting by means other than single-occupancy motor vehicles (part of the Federal Employees Clean Air Incentives Act)**

**515.4.2 Internal Mandatory References**

- \*a. [AID Form 515-1, Application for Transit Benefit](#)
- b. [Transit Benefit/Third Party Pickup Form](#)
- \*c. SmartBenefit Application, available from M/AS/CPD, Room 4.10A

**515.5 ADDITIONAL HELP**

**515.6 DEFINITIONS**  
Effective Date: 10/10/2000

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