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Personnel



MASS TRANSPORTATION BENEFIT PROGRAM (MTBP)

COMPLIANCE WITH THIS PUBLICATION IS MANDATORY

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This publication implements Department of Air Force Policy Directive (DAFPD) 36-39, *Mass Transportation Benefit Program (MTBP)*, and supplements Department of Defense Instruction (DoDI) 1000.27, *Mass Transportation Benefit Program (MTBP)*. The DoDI is printed word-for-word in regular font without editorial review. Department of the Air Force (DAF) supplementary material is printed in bold font and indicated by “(Added)(DAF)”. This supplement provides guidance for establishing and managing the DAF MTBP program. This publication applies to all DAF civilian employees including civilian employees of the United States Space Force (USSF) and to non-appropriated fund (NAF) civilian employees, and to uniformed members of the Regular Air Force, the Air Force Reserve (AFR), the Air National Guard (ANG), and the USSF. This publication may be supplemented at any level; all major command (MAJCOM), field command (FLDCOM) or corresponding Secretariat, Air Staff and Office of the Chief of Space Operations level supplements must be approved by the Human Resources Management Strategic Board prior to certification and approval. All supplements that directly implement this publication must be routed to the office of primary responsibility (OPR) for coordination. Refer recommended changes and questions about this publication to the OPR using the DAF Form 847, *Recommendation for Change of Product*; route DAF Forms 847 from the field through the appropriate functional chain of command. The authorities to waive wing, unit, delta or garrison level requirements in the DAF supplement portion of this publication are identified with a Tier (T-0, T-1, T-2, or T-3) number following the compliance statement. See DAF Manual 90-161, *Publishing Processes and Procedures*, for a description of the authorities associated with the tier numbers. Submit requests for waivers through the chain of command to the appropriate tier waiver approval authority, or alternately, to the publication OPR for non-tiered compliance items. In collaboration with the Chief of Air Force Reserve, (AF/RE), the Director of the Air National Guard, (NGB/CF), and the Deputy Chief of Space Operations for Human Capital (SF/S1), the Deputy Chief of Staff for Manpower, Personnel and Services (AF/A1) develops personnel policy for the DAF MTBP. This instruction requires the collection and or maintenance of information protected by the Privacy Act of 1974 authorized by Department of Defense Instruction (DoDI) 5400.11, *DoD Privacy and Civil Liberties Programs*. The applicable system of records notice OPM/GOVT-1, General Personnel Records is available at:

<https://dpcl.d.defense.gov/Privacy/SORNs/>. Ensure all records generated as a result of processes prescribed in this publication adhere to Air Force Instruction 33-322, *Records Management and Information Governance Program*, and are disposed in accordance with the Air Force Records Disposition Schedule, which is located in the Air Force Records Information Management System.

SUMMARY OF CHANGES

This document has been revised to incorporate updated references and current publication guidance. Revisions include the designation of one local Program Manager (PM) and one alternate PM at each location, with appointment letters prepared in accordance with the outside the National Capital Region (ONCR) appointment letter template. Appointment letters are to be submitted by October 1st of each calendar year for recertification. The update also establishes a reoccurring meeting between the MTBP policy PM and all local PMs to ensure program consistency and coordination. Supplemental guidance specific to the Air and Space Force has been developed, providing instruction-based procedures to support field operations. Additional updates include detailed instructions for fulfilling annual program requirements, specified timeframes for participant withdrawal from MTBP benefits, safeguards for calculating and confirming monthly benefits, and a general overview of the application processing timeline.



Department of Defense INSTRUCTION

NUMBER 1000.27

October 28, 2008

Incorporating Change 1, Effective January 16, 2025

USD(P&R)

SUBJECT: Mass Transportation Benefit Program

References: See Enclosure 1

1. PURPOSE. This Instruction:

a. Establishes policy, assigns responsibilities, and sets procedural guidance consistent with the authority provided in DoD Directive 5124.02 (Reference (a)) for the administration and management of the Mass Transportation Benefit Program (MTBP) as directed by Section 7905 of Title 5, United States Code (U.S.C.), and Executive Order 13150 (References (b) and (c)).

b. Incorporates and supersedes previous Deputy Secretary of Defense guidance (Reference (d)).

2. APPLICABILITY. This Instruction applies to OSD, the Military Departments, the Office of the Chairman of the Joint Chiefs of Staff and the Joint Staff, the Combatant Commands, the Office of the Inspector General of the Department of Defense (IG DoD), the Defense Agencies, the DoD Field Activities, and all other organizational entities within the Department of Defense (hereafter referred to collectively as the "DoD Components").

3. DEFINITIONS. See Glossary.

4. POLICY. It is DoD policy that:

a. The Department of Defense shall provide mass transportation benefits (MTBs) to offset commuting costs to its active duty military members and employees, including nonappropriated fund (NAF) employees, to the extent authorized by law and regulation, to reduce pollution and traffic congestion, preserve the environment, and expand transportation alternatives inside the National Capital Region (NCR) and outside the NCR (ONCR).

b. Only those military members and civilian employees who meet the eligibility criteria in this Instruction may participate in the MTBP.

c. Command and installation MTBs shall be established when there is employee or military member interest, regardless of the number of personnel so interested.

d. MTBs will be authorized only when qualified means of transportation (QMOT) systems are used.

e. The MTBP shall be adequately funded to prevent benefit restriction or denial. The statutory increases governed by Section 132 of Title 26, U.S.C. (Reference (e)), shall be adhered to by all the DoD Components.

f. Commuting costs shall not include costs incurred for parking, van pool, ferry cost, or costs for holding van pool space during an extended absence.

5. RESPONSIBILITIES. See Enclosure 2.

6. PROCEDURES. Enclosures 3 through 8 provide overarching procedures and requirements for the administration, implementation, and management of the MTBP.

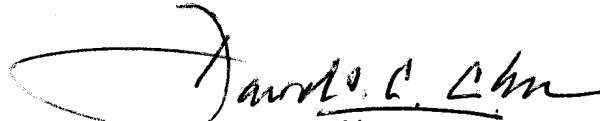
7. RELEASABILITY. **Cleared for public release.** This instruction is available on the Directives Division Website at <https://www.esd.whs.mil/DD/>.

8. SUMMARY OF CHANGE 1. The changes to this issuance are administrative and update:

a. Paragraphs 1 and 2 of Enclosure 4 to comply with Section 3111(c) of Reference (b).

b. Organizational titles and references.

8. EFFECTIVE DATE. This Instruction is effective October 28, 2008.



David S. C. Chu
Under Secretary of Defense for
Personnel and Readiness

(Added)(DAF) Approved by:

BRIAN L. SCARLETT, SES, DAF
Principal Deputy Assistant Secretary of the
Air Force for Manpower and Reserve Affairs

Enclosures

1. References
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 4. Participant Eligibility
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ENCLOSURE 1

REFERENCES

- (a) DoD Directive 5124.02, “Under Secretary of Defense for Personnel and Readiness (USD(P&R)),” June 23, 2008
- (b) Title 5, United States Code
- (c) Executive Order 13150, “Federal Workforce Transportation,” April 21, 2000
- (d) Deputy Secretary of Defense Memorandum, “Department of Defense Transportation Incentive Program,” October 13, 2000 (hereby canceled)
- (e) Section 132 of Title 26, United States Code
- (f) DoD Instruction 5010.40, “Managers’ Internal Control Program Procedures,” May 30, 2013, as amended
- (g) Chapter 47 of Title 10, United States Code
- (h) DoD Instruction 1015.15, “Establishment, Management, and Control of Nonappropriated Fund Instrumentalities and Financial Management of Supporting Resources,” October 31, 2007, as amended
- (i) Section 1.132- 9 of Title 26, Code of Federal Regulations
- (j) Section 101 of Title 37, United States Code
- (k) **(Added)(DAF) Department of Defense Instruction (DoDI) 5400.11, *DoD Privacy and Civil Liberties Programs*, 29 January 2019.**
- (l) **(Added)(DAF) Department of Air Force Policy Directive (DAFPD) 36-39, *Mass Transportation Benefit Program (MTBP)*, 11 January 2023**
- (m) **(Added)(DAF) Department of the Air Force Manual 90-161, *Publishing Processes and Procedures*, 18 October 2023**
- (n) **(Added)(DAF) Air Force Instruction 33-322, *Records Management and Information Governance Program*, 23 March 2020**

(Added)(DAF) *Prescribed Forms*
None

(Added)(DAF) *Adopted Forms*

(Added)(DAF) DAF Form 847 – *Recommendation for Change of Product*

(Added)(DAF) Department of Defense Form 577, *Appointment/ Termination Record – Authorized Signature*

(Added)(DAF) Optional Form (OF) 1164 – *Claim for Reimbursement for Expenditures on Official Business*

ENCLOSURE 2

RESPONSIBILITIES

1. UNDER SECRETARY OF DEFENSE FOR PERSONNEL AND READINESS (USD(P&R)). The USD(P&R) shall have overall responsibility for the DoD MTBP.
2. DEPUTY ASSISTANT SECRETARY OF DEFENSE FOR CIVILIAN PERSONNEL POLICY (DASD(CPP)). The DASD(CPP), under the authority, direction, and control of the USD(P&R), shall:
 - a. Develop policy in coordination with the Deputy Assistant Secretary of Defense for Military Personnel Policy and the Under Secretary of Defense (Comptroller)/Chief Financial Officer, Department of Defense.
 - b. Provide advice and guidance on policy interpretation, in support of the USD(P&R).
 - c. Assess field program accountability through Human Capital Accountability and Assessment Framework reviews.
 - d. Monitor program integrity by ensuring DoD Component completion of required Internal Controls and reviewing the IG DoD reports on MTBP operations.
3. IG DoD. The IG DoD shall:
 - a. Periodically review DoD Component program operations to ensure consistency with governing rules and regulations.
 - b. Report any findings to the USD(P&R) for needed program policy adjustments.
4. HEADS OF THE DoD COMPONENTS. The Heads of the DoD Components shall:
 - a. Develop an MTBP, to include budget and appropriate funding for transit subsidies and program administrative support. This authority may be re-delegated to the installation or field activity command level.
 - b. Ensure MTBP participation is adequately funded to prevent benefit restriction or denial and may further define funding sources in internal policy and procedure. Provide funding and administrative oversight, as needed, for participating DoD Component members ONCR.
 - c. Provide funding and administrative support, as needed, to the Washington Headquarters Services (WHS) for participating DoD Component members in the NCR.

- d. Develop DoD Component-level policy and procedures for program administration.
- e. Implement a comprehensive system of internal management controls that provides reasonable assurance that the MTBP is operating as intended, according to DoD Instruction 5010.40 (Reference (f)).
- f. Evaluate the adequacy of the internal management controls over the MTBP and review, assess, and report on the effectiveness of those controls in an annual Statement of Assurance according to Reference (f).
- g. Establish and implement an internal control program that ensures the integrity of and accountability for MTBP operations, in accordance with criteria in Enclosure 3.
- h. Investigate allegations of program abuse and determine sanctions as necessary.
 - (1) Civilian employees who fail to abide by the terms and conditions of the MTBP may be subject to disciplinary action, up to and including removal from the Federal service and/or criminal prosecution, as appropriate.
 - (2) Military members who violate the provisions of the MTBP may be subject to administrative action and/or punitive action under the Uniform Code of Military Justice (Reference (g)), as appropriate.
- i. Ensure procedures are in place for MTBP officials to have access to data needed to ensure program integrity, e.g., subsidized parking information.
- j. Appoint, in writing, an office of primary responsibility (OPR) to manage the MTBP. The program OPR shall be responsible, either personally or through delegations of administrative responsibilities to PMs at local commands and installations, for:
 - (1) Developing the method for processing and overseeing applications and claims, or overseeing an automated application and claim process.
 - (2) Providing for purchase and distribution of transportation vouchers to eligible participants.
 - (3) Providing oversight to program operations through development and implementation of a comprehensive internal controls program.
 - (4) Providing guidance to command leadership regarding sanctions to address program abuse.
- k. Contract, where appropriate, to order, purchase, verify, maintain, and safeguard fare media.

(1) The DoD Components are responsible for ensuring contractor compliance with terms of contracts.

(2) Agreements with service providers should include a requirement for internal auditing as required by the DoD Component.

5. DIRECTOR, DEFENSE FINANCE AND ACCOUNTING SERVICE (DFAS). In addition to the responsibilities in Section 4, and under the authority, direction, and control of the Under Secretary of Defense (Comptroller)/Chief Financial Officer, Department of Defense, the Director, DFAS, shall:

a. Process, if applicable, mass transportation benefits or collections based on approved Standard Form (SF) 1164, "Claim for Reimbursement for Expenditures on Official Business," or other DoD-sanctioned reimbursement forms, applications, or automated systems.

b. Bill customers for processing costs consistent with Defense Working Capital Fund rules.

6. DIRECTOR, WHS. In addition to the responsibilities in Section 4, the Director, WHS shall:

a. Develop, administer, monitor, and evaluate the MTBP for all of the DoD Components in the NCR.

b. Bill and receive funding from DoD Components for services rendered to DoD Component members under the WHS NCR MTBP.

7. LOCAL COMMAND AND INSTALLATION PMs. In accordance with DoD Component policy, and as needed for effective program operations, local command and installation commanders shall appoint a PM to support the OPR in the administration of the local program and to perform the following:

a. Implement DoD Component MTBP policies and procedures.

(1) (Added)(DAF) The mass transportation program is location-specific, not unit-specific, requiring the installation Commander to appoint managers for all Air and Space Force Civilians and military members. Commanders should appoint a primary Air Force local PMs and coordinate with other participating Air Force and Space Force tenants to identify alternate local PMS to support the OPR in the administration of the local program. Exceptions to appoint more than one primary Air Force PM may be reviewed on a case-by-case basis.

(2) (Added)(DAF) All appointment letters should be completed using the Air Force ONCR Appointment letter template to ensure all requirements are met and necessary information is captured.

(3) (Added)(DAF) All Appointment letters should be updated and submitted for recertification by October 1st of each calendar year.

(4) (Added)(DAF) All local PMs should take the DOT Integrity Awareness Training on an annual basis and email the certificate of completion to the MTBP Policy Manager by October 1st.

b. Ensure the local command or installation MTBP complies with applicable law, regulations, and ethics principles.

c. Provide DoD ethics briefing materials for participants upon initial enrollment in the program and, where program administration is automated, provide annual ethics reminders thereafter.

(1) (Added)(DAF): Supplemental guidance specific to the Air and Space Force will be readily accessible for review and emails will be sent throughout the year as reminders. A meeting between the MTBP policy PM and local PMs will be established on a reoccurring basis.

d. Provide for purchase, which may be accomplished through a service provider, and distribution of transportation vouchers to eligible participants (except in areas where vouchers are not readily available).

(1) (Added)(DAF) Effective September 2025, TRANServe will no longer provide paper transit vouchers to program participants.

e. Perform, at a minimum, a 10 percent annual record reconciliation to ensure participant accounts are correct.

(1) (Added)(DAF) Each calendar year the MTBP PM will assign a due date between the months of June and September to complete the 10 percent annual record reconciliation. All local PMs will be provided with a count totaling to 10 percent of the location's participant enrolment and will be given 60 calendar days to complete annual 10 percent record reconciliation. A location's failure to complete the 10 percent annual record reconciliation may lead to a complete withdrawal of all participants at the location and all participants provided the MTBP refresher packet complete.

f. Conduct 100 percent annual participant re-enrollment at locations where program administration is automated.

(1) (Added)(DAF) Each calendar year between the months of January and April all MTBP participants should complete an annual re-certification of the MTBP application and take the Department of Transportation (DOT) Integrity training. Participants should email the DOT Integrity Training certificate to the local PM within two (2) working days of completing the annual recertification.

(2) (Added)(DAF) An annual report will run each calendar year in May to confirm participant re-certification. All participants who have failed to re-certify by June 1st and/or complete the DOT Integrity training will be contacted by the local PM. All participants who have failed to complete the annual recertification by June 31st will be withdrawn from the program the first week in July and given the MTBP refresher packet to complete. Participants that are withdrawn will be eligible to apply for MTBP benefits the following working day. Applications should not be approved in the system until the participant has completed the MTBP refresher packet.

g. Institute procedures for identifying and processing applicant situational changes that could impact mass transportation benefit eligibility or require reimbursement to the government, e.g., departure from command, change of residence, and extended temporary duty (TDY) or leave.

(1) (Added)(DAF) Participants who will not use MTBP benefits for 30 days or more should temporarily withdraw from the MTBP to pause benefits. Participants should reapply for MTBP benefits at least seven (7) working days prior to the return to work date for benefits to be available for use.

(2) (Added)(DAF) It is recommended that local PMs receive an out-processing list from the local human resources office every 60 days to ensure participants that have separated are withdrawn from the MTBP program.

h. Annually assess program operations in accordance with DoD Component policy or procedures, to ensure program integrity and affirm completion of this assessment to DoD Component OPRs.

i. Perform the duties of the OPR, depending on the scope of the program.

(1) (Added)(DAF) Local PMs are responsible for maintaining readily accessible van pool logs for review by the MTBP policy PM.

8. REVIEWING OFFICIAL (RO). The RO is the local responsible party, designated in accordance with DoD Component policy, who is knowledgeable of the program requirements. The RO shall:

a. Review program requirements with, or provide requirements information to, program participants.

b. Receive and review applications for completeness, including work address, commuting origination point, reasonableness of commuting costs, and supervisory signature.

c. Ensure participant eligibility in accordance with criteria in Enclosures 4 and 5 as indicated in the cost calculation worksheet and participant application.

d. Ensure applicants are not in receipt of a parking subsidy, as defined in Enclosure 6, through comparison of participant and parking databases.

e. Receive certification from program participants, which indicates understanding of and agreement to conform to all program requirements.

f. Require supporting documentation for program participants, including commuting cost calculations as outlined in Enclosure 7, and conduct a random sample of calculations to ensure program compliance with program regulations.

(1) (Added)(DAF) Participants should use QMOT for commuting on at least 50% of their scheduled workdays. Those who do not meet this requirement should recalculate their estimated commuting costs. (T-0)

g. Sign the application form in the appropriate block or return to applicant for clarifying information. Upon automation of application functions, follow system procedures replacing the manual review and signature processes.

9. SUPERVISORS. Supervisors shall:

a. Confirm the applicant as an eligible military member or a DoD civilian employee.

b. Confirm the accuracy of the duty station as stated on the MTBP.

c. Ensure the commuting cost calculation reflects the applicant's correct work schedule, e.g., part-time or full-time, and/or work situation, e.g., telework.

d. Sign the application form.

e. Conduct other actions that may be required by local, command, or DoD Component policy.

f. Forward application according to applicable local, command, or DoD Component policy and procedures to ensure the application is processed in accordance with criteria in Enclosure 8.

10. PARTICIPANTS. Participants are responsible for adhering to all program criteria outlined in this Instruction and with local, command, or DoD Component procedures. Participants shall use this benefit solely for the purposes outlined in the Policy section of this Instruction. Participants shall not seek personal financial gain through trade or sale of the benefit. Claims for the MTBP shall be based solely on costs associated with the use of a QMOT to and from the worksite in conjunction with employment in the Department of Defense. Benefits are authorized only if a QMOT is used. Parking costs may not be claimed under the MTBP. Participants shall:

a. Request participation in the MTBP using either the DoD MTBP standard application form and any local supplemental form that may be required or automated application, as available.

(1) (Added)(DAF) In the instance a participant has not been assigned a government email, i.e. custodial staff, the participant should request participation using the Department of Air Force Mass Transportation Benefit Program Application Form. The application may be printed and signed by the participant.

- b. Meet the eligibility requirements in Enclosures 4 and 5 to participate in the program.
- c. Adhere to all governing program rules and regulations.
- d. Complete required ethics training.
- e. Submit SF 1164 or other reimbursement forms designated by DoD Component procedures within the timeframes required for reimbursement claim.
- f. Forward application according to applicable local, command, or DoD Component policy and procedures to ensure the application is processed in accordance with criteria in Enclosure 8.
- g. Upon separation, extended leave, or TDY, or when fare media is unused, participant will return unused fare media or reimburse the Government via applicable Service or agency guidelines.

(1) (Added)(DAF) Upon separation from the agency the fare media should be destroyed. If a participant is on extended leave or TDY and plans to return to the agency, the card should be kept for future use.

11. (Added)(DAF) DEPARTMENT OF AIR FORCE PERSONNEL.

a. (Added)(DAF) Deputy Chief of Staff for Manpower, Personnel, and Services (AF/A1) in coordination with the Deputy Chief of Space Operations for Human Capital (SF/S1), executes policy, and develops, coordinates, and approves essential procedural guidance for DAF MTBP consistent with DAFPD 36-39.

b. (Added)(DAF) Directorate of Civilian Force Management (AF/A1C) is the designated OPR for the MTBP and is responsible for the OPR duties outlined in section 4.j. of Enclosure 2. In addition to those responsibilities outlined in section 4.j., AF/A1C will:

(1) (Added)(DAF) Develop policy, implement program changes, and provide guidance for the MTBP. (T-1)

(2) (Added)(DAF) Designate a MTBP policy PM. (T-1)

(3) (Added)(DAF) Develop or revise directives, guidance, instructions and other program information based on DoD guidance and other regulations and laws as required. (T-1)

(4) (Added)(DAF) Ensure compliance with applicable guidance identified in the references and this guidance. (T-1)

(5) (Added)(DAF) Provide general guidance to the ANG and AFR with questions regarding policy, program objectives, responsibilities, internal controls and allegations of program abuse. (T-1)

(6) (Added)(DAF) Review and certify agreements between the DAF and Department of Transportation (DOT) for program services and support. (T-1)

(7) (Added)(DAF) Program and fund support for continuous service. (T-1)

(8) (Added)(DAF) Develop program and budget requirements and submit through the DAF resource manager during the DAF planning, programming, budgeting and execution process. (T-1)

(9) (Added)(DAF) Assist installations with the internal controls requirements to ensure proper execution of the program and to maintain proper fiduciary oversight of program resources. (T-1)

(10) (Added)(DAF) Forward monthly ONCR reports to local PMs for review and verification of charges and service/fare media products. (T-1)

c. (Added)(DAF) Directorate of Plans & Integration, Resources Division (AF/A1XR) will:

(1) (Added)(DAF) Execute funding for the program in a timely manner as required by DAF agreements with DOT and WHS. (T-1)

(2) (Added)(DAF) Coordinate with DFAS and WHS on payment of mass transportation expenses. (T-1)

d. (Added)(DAF) Director of the Air National Guard (NGB/CF) will:

(1) (Added)(DAF) Implement the MTBP for ANG, active military and civilian participants consistent with DAFPD 36-39. (T-1)

(2) (Added)(DAF) Execute policy, provide guidance, and implement program changes. (T-1)

(3) (Added)(DAF) Ensure the MTBP is included in in- and out-processing procedures. (T-1)

(4) (Added)(DAF) Ensure procedures are established to reimburse participants, whose mode of transportation does not accept the debit card, or for those participants who did not receive benefits in a timely manner through no fault of their own, using Optional Form (OF) 1164, Claim for Reimbursement for Expenditures on Official Business. (T-1)

e. (Added)(DAF) Chief of Air Force Reserve (AF/RE) will:

(1) (Added)(DAF) Implement MTBP for AFR military and civilian participants consistent with DAFPD 36-39. (T-1)

(2) (Added)(DAF) Execute policy, provide guidance, and implement program changes. (T-1)

(3) (Added)(DAF) Ensure the MTBP is included in in- and out-processing procedures. (T-1)

(4) (Added)(DAF) Ensure procedures are established to reimburse participants, whose mode of transportation does not accept the debit card, or for those participants who did not receive benefits in a timely manner through no fault of their own, using OF 1164. (T-1)

f. (Added)(DAF) MAJCOM, FLDCOM and direct reporting unit commanders will implement the MTBP consistent with this instruction and any other DAF procedural guidance and provide a point of contact for the program to the AF/A1C MTBP policy PM. (T-1)

g. (Added)(DAF) The Air Force District of Washington commander will implement the program for Headquarters Air Force in the NCR, to include all Field Operating Agencies in the NCR. (T-1)

h. (Added)(DAF) Field Operating Agencies outside the NCR will:

(1) (Added)(DAF) Follow the host installation MTBP procedures. (T-1)

(2) (Added)(DAF) Assist with the implementation of major program changes such as the transition to automation, new policy implementation, DAF or higher-level audits, etc. (T-1)

(3) (Added)(DAF) Ensure the MTBP is part of in- and out-processing procedures. (T-1)

i. (Added)(DAF) Installation commanders will:

(1) (Added)(DAF) Implement and provide support for the local MTBP. (T-1)

(2) (Added)(DAF) Ensure proper execution consistent with this instruction. The local program may be administered by different functional activities (personnel, finance, logistics, transportation, etc.) as determined by the installation commander. (T-1)

(3) (Added)(DAF) Appoint a local PM to serve as the reviewing official (RO), and perform delegated duties in support of the administration of the local program. (T-1)

(4) (Added)(DAF) Submit an appointment letter to the DOT Transit Benefit Manager and AF/A1C MTBP policy PM. (T-1)

(5) (Added)(DAF) Submit a completed Department of Defense Form 577, Appointment/ Termination Record – Authorized Signature, to finance so that the MTBP policy PM can verify and sign claims for reimbursement using OF 1164, if necessary. (T-1)

(6) (Added)(DAF) Ensure procedures are established to reimburse participants, whose mode of transportation does not accept the debit card, or for those participants who did not receive benefits in a timely manner through no fault of their own, using OF 1164. (T-1)

(7) (Added)(DAF) Ensure proper execution of the program and maintain proper fiduciary oversight of program resources. (T-1)

(8) (Added)(DAF) Implement appropriate internal controls as identified in this instruction. (T-1)

j. (Added)(DAF) The local PM will:

(1) (Added)(DAF) Provide support by performing duties listed in section 7, Enclosure 2 (T-1), and serve as the RO, performing functions listed in section 8, Enclosure 2. (T-3) For programs on large installations/activities, the RO may be a separate position.

(2) (Added)(DAF) Approve participants' requests for benefits received through the electronic application system. (T-1)

(3) (Added)(DAF) Applications may be processed manually for participants who do not have access to a computer.

(4) (Added)(DAF) Inform appropriate management official if participants are required to relinquish their parking passes as a condition of enrollment into the program. (T-1)

(5) (Added)(DAF) Request additional information from participants or supervisors, to verify employment status, work schedule, specific means of transportation, commuting cost calculations, etc. (T-1)

(6) (Added)(DAF) Determine the reasonableness of commuting costs. (T-1)

(7) (Added)(DAF) Maintain an internal tracking system of participants. (T-1)

(8) (Added)(DAF) Notify participants and/or supervisors in writing of the policy requirement to adjust benefits for actual commuting expenses when records show no adjustment due to leave, holidays, telework days and temporary duty travel, or for funding or certification discrepancy. (T-3)

(9) (Added)(DAF) Maintain a list of van pool vendors utilized by agency participants, to include the name of the driver or operator, van pool business name, address, and phone number. The list of van pool vendors, with driver and operator identified, should be cross-referenced and validated to ensure consistency and accuracy with van pool participants receiving the transportation benefits. (T-1)

(10) (Added)(DAF) Review monthly van pool logs to determine compliance to governing regulations and laws. (T-1)

(11) (Added)(DAF) Recoup expenses that cannot be recouped by returning fare media or deducting the amount the participant receives in future months for repayment to be made to the DAF. (T-1)

(12) (Added)(DAF) Monitor and assist with the internal controls required to ensure proper execution of the program and to maintain proper fiduciary oversight of program resources. (T-1)

(13) (Added)(DAF) Become familiar with the area's mass transportation commuting alternatives and provide interested participants with this information. (T-3)

(14) (Added)(DAF) Ensure all military members and civilian employees are aware of the benefit's availability, guidelines, and restrictions as outlined on the MTBP myPers/myFSS webpage under Benefits and Entitlements. Internal communication media, including local installation newspapers, e-mail distribution lists, flyers, bulletin boards, etc., should be used to inform potential participants. (T-3)

k. (Added)(DAF) Supervisors will:

(1) (Added)(DAF) Perform responsibilities outlined in section 9 of Enclosure 2. (T-1)

(2) (Added)(DAF) Review and sign the electronic application to confirm the applicant's eligibility and duty station, and ensure the commuting cost calculation reflects the applicant's correct work schedule. (T-1)

(3) (Added)(DAF) Take appropriate action to investigate false, fictitious, or fraudulent certifications made by participants, and initiate disciplinary or adverse action, if appropriate. (T-3)

I. (Added)(DAF) Participants will:

(1) (Added)(DAF) Follow the guidelines outlined in section 10 of Enclosure 2. (T-1)

(2) (Added)(DAF) Obtain information on benefits and how to apply for the program from the local PM. In some cases, the local PM may be an Army or Navy representative. If the military member or civilian employee is the only DAF participant at an installation/activity that does not have a program or cannot assist the applicant, the applicant may contact a local PM at the nearest DAF installation/activity.

(3) (Added)(DAF) Complete required ethics awareness training, and any required monthly expense and scheduled work days calculations/documentation as part of initiating the enrollment application. (T-1)

(4) (Added)(DAF) Estimate or verify monthly commuting costs by multiplying the daily commuting cost by the number of days expected to use mass transportation including calculating costs on a pro-rated basis when working part-time or on compress work schedules. (T-1) Parking fees are not included in commuting cost calculations.

(5) (Added)(DAF) Initiate changes to personal information, recertify monthly costs, recalculate monthly commuting costs due to extended absences, or to withdraw from the program. (T-1)

(6) (Added)(DAF) Withdraw from the program when retiring, transferring or separating. (T-1)

ENCLOSURE 3

PROGRAM MANAGEMENT AND OVERSIGHT

1. To prevent and detect waste, fraud, and abuse, commands and field installations are required to develop internal management control procedures and mechanisms and conduct internal reviews to assess whether their MTBPs conform to the DoD policy, guidance, and procedures established in this Instruction. In an annual Statement of Assurance (see Reference (f)), each DoD Component must provide assurance that internal management controls are operating as intended. Internal controls shall include:
 - a. Provision of DoD ethics briefing materials for participants upon initial enrollment in the program and, where program administration is automated, provide annual ethics reminders thereafter.
 - b. Periodic reviews and reconciliations or comparisons of mass transportation benefit and parking databases to ensure adherence to applicant eligibility criteria.
 - c. Institution and implementation of procedures to identify and process situational changes that could impact the amount of the mass transportation benefit, or would require reimbursement to the Government, e.g., change in commuting patterns, extended TDY, or leave.
 - d. Removal from the MTBP as part of the installation or command exit procedures.
 - e. Validation of information provided on participants' applications, including:
 - (1) Eligibility
 - (2) Work address
 - (3) Commuting origination point
 - (4) Certification statement
 - (5) Commuting cost breakdown
 - f. Confirmation that:
 - (1) Participants have been provided a false statement warning.
 - (2) Participants' supervisors have reviewed and signed the participants' application forms.

2. Until the application process becomes fully automated, a minimum of 10 percent of MTBP participants will be required to recertify annually to ensure the overall integrity of the program. Upon implementation of an automated application process, participants may be required to reapply or recertify annually.
3. The MTBP shall be included as an assessable unit in both the command's Managers' Internal Control Program and DoD Component Inspector General audits.
4. MTBP PMs must ensure that internal controls are not accusatory and conform to governing laws and ethics principles, including relevant labor relations statutes. The intent of internal control measures is not to discourage participation through harassment, but to ensure compliance with program guidelines.
5. DoD Components are encouraged to collect and periodically review, as part of their program management oversight responsibilities:
 - a. Official documentation on work schedules for participants who work part-time, telework, or have unusual working hours.
 - b. Copies of contracts, invoices, or receipts from van pool participants, to ensure the van pool is in compliance with the regulations of the program.
6. The DoD Components shall optimize the use of DoD automated systems, where available, to improve the efficiency, effectiveness, and accountability of processing applications; verification and reconciliation of applicant information; and program reporting. Systems used shall be compatible with automated DoD personnel and pay systems.
7. **(Added)(DAF) The mass transportation subsidy is a benefit available to eligible military members and civilian employees using various forms of fare media. The subsidy is not an entitlement. The benefit is not to be used for any other purpose, and may not be given, sold, or otherwise transferred to another individual. Program participants may have their privileges restricted or suspended based on fraud, misconduct, or abuse related to their participation in the MTBP.**
8. **(Added)(DAF) Claims are not permitted on a retroactive basis. For manual reimbursement using OF 1164, a participant may only claim benefits from the date the application is approved. The claim may be based on delay in receiving benefits due to no fault of the participant and made known to the local PM. The usual waiting period for receiving benefits through electronic means is not cause for manual reimbursement.**

9. (Added)(DAF) Eligible personnel may not be placed on a waiting list for enrollment into the program outside of the normal enrollment process. There is no requirement for a minimum or maximum number of participants at any given installation.

10. (Added)(DAF) Eligible personnel without access to a computer may submit the required forms directly to the local PM for enrollment in the program. A link to instructions and the required forms may be provided by the MTBP PM.

11. (Added)(DAF) Participants on temporary duty or leave are not eligible to claim benefits for the period of absence. These individuals must calculate their estimated costs for the time period based on the days that they actually utilize mass transportation. (T-0) These individuals will receive either a reduced, pro-rated benefit for that distribution time period, or credit the benefit received toward the next distribution time period.

12. (Added)(DAF) Claims for reimbursement for transportation costs incurred for official transport to and from the place of work in a temporary duty location go through the travel reimbursement process in accordance with the Joint Travel Regulations.

13. (Added)(DAF) In addition to the oversight and internal controls set forth earlier in this instruction, the installation commander or civilian equivalent, through delegation to the local PM or other personnel involved in the program, will:

- a. (Added)(DAF) Support ethics awareness and annual refresher training. (T-3)
- b. (Added)(DAF) Ensure MTBP is an assessable function in the installation's Risk Management Internal Control (RMIC) Program. (T-3)
- c. (Added)(DAF) Obtain an updated roster of participants to verify participants' information, status and eligibility, requested benefit amount, benefits used, etc., semi-annually. (T-3)
- d. (Added)(DAF) Compare and track van pool ridership against eligible amounts of fare media. (T-3)
- e. (Added)(DAF) Maintain a list of QMOT. (T-3)
- f. (Added)(DAF) Verify the accuracy of participant's cost calculations during the approval process. (T-3)
- g. (Added)(DAF) Track participant distribution pick-up dates and amounts. (T-3)
- h. (Added)(DAF) Ensure participants re-certify when the monthly commuting costs change based on temporary duty or extended leave (i.e. 30 days or more). (T-3)

i. (Added)(DAF) Request official documentation on work schedules for participants who work part-time, telework, or have unusual working hours for audit trail purposes. (T-3)

j. (Added)(DAF) Reconcile mass transportation program participants against the installation's list of those with parking privileges. (T-3)

k. (Added)(DAF) May request copies of logs, contracts, invoices, and/or receipts from van pool participants to ensure the van pool is in compliance with program regulations and laws.

ENCLOSURE 4

PARTICIPANT ELIGIBILITY

1. To be eligible to participate in the DoD MTBP, participants must:

a. Use a QMOT as the primary mode of transportation to commute to and from work or to a designated telework center;

b. Not be receiving mass transportation benefits from other sources;

c. Not be in receipt of a parking subsidy; and

d. Fall within one of five categories:

(1) DoD Active Component (AC) Military Service members.

(a) (Added)(DAF) This includes members of the USSF in sustained duty (full-time) serving on active duty orders for 31 days or more.

(2) DoD Reserve Component (RC) Military Service members (including both Reservists and National Guard Members) and USSF members who are on qualifying active duty. Eligible RC Service members on Active Duty for less than 30 days:

(a) Must apply for the MTB in the same manner as is applicable to AC Service members in the same geographic area. Approved program enrollment is a prerequisite for any form of reimbursement under the MTBP.

(b) May be denied fare media disbursement of MTB by DoD Component policy. In those cases where fare media is not disbursed to these members, DoD Component policy must allow for the MTB via reimbursement procedures.

(3) DoD Federal civilian employees, including Federal employees on part-time work schedules and paid interns.

(4) DoD NAF personnel employed by a duly constituted DoD nonappropriated fund instrumentality (NAFI). To the extent Military Departments are authorized to provide appropriated fund support to NAIs for military and civilian personnel under Table E4.T1 of DoD Instruction 1015.15 (Reference (h)), the Departments may budget to include amounts for MTBs for supported categories of personnel.

(5) Students or others who provide voluntary service, in accordance with Section 3111(c) of Reference (b).

2. Personnel ineligible for participation in the DoD MTBP include:

a. DoD civilian employees and military members who are named on a Federally subsidized parking permit. However, relinquishment of a Federally subsidized parking permit will allow the employee to apply for the MTBP.

b. Van pool owners who are drivers or passengers of a for-profit van pool.

c. Military member, civilian, and NAF employee van pool drivers riding at no cost or receiving compensation, monetary or non-monetary, for driving the van pool (except for those only receiving a reduced rate).

d. DoD RC Service members who are drilling or training in an inactive duty for training status or USSF military members on non-sustained duty or on active duty orders for less than 30 days.

e. NAF-employed personnel whose salary is not funded by a duly constituted NAFI.

f. Reserve Officer Training Corps students unless they are enlisted in a military branch and serving on active duty.

g. DoD military retirees and DoD civilian retirees unless otherwise eligible.

h. Military dependents unless otherwise eligible.

i. Military members, and civilian and NAF employees who are receiving transportation benefits from other sources.

j. Contractors.

k. Intergovernmental Personnel Act employees (except those appointed to Federal positions or those who meet the definition of employees under Section 2105 of Reference (b)), Foreign Exchange personnel, and personnel detailed to DoD from other Federal agencies, nongovernment organizations, private industry, and academic institutions.

3. Eligible personnel may not be placed on a waiting list for enrollment into the program outside the normal enrollment process.

ENCLOSURE 5

QMOT

QMOT are:

- a. Commuter bus.
- b. Commuter train.
- c. Subway or light rail.
- d. Ferry.

(1) Ferries are an approved form of mass transportation to the workplace. Program participants using a ferry are authorized to claim the foot passenger rate only. This includes walkers, bicyclists, and van pool members (not including the driver).

(2) Ferries are not an approved form of public transportation when used as a means to shuttle the participant's privately owned vehicle (POV) from one point to another where the POV is used to complete the journey to a participant's duty station.

- e. Van Pools.

(1) To be considered as a QMOT, van pools must meet the guidelines stated in Section 1.132-9, Title 26, Code of Federal Regulations (Reference (i)), and be engaged in "for profit" as that term is interpreted under Reference (e). The vehicle may be owned and operated by either public transit authorities (commercial) or by a private vendor in the business of transporting persons for compensation or hire, and must have seating capacity for at least six adults, not including the driver. Private van pools are subject to the same eligibility criteria as commercial or private vendor van pools. Where local transit authorities exist, van pool operators should comply with rules and procedures established by that local transit authority, to include registration. DoD Components may require van pool registration in internal policy.

(2) Rental vehicles, personal car-pools, ride sharing by individual riders often referred to as "slugs," or employee purchased vans that do not meet the requirements under Reference (e) are not considered QMOT.

(3) Van pool drivers may be eligible for the MTB only when they:

- (a) Do not own or operate the van pool;
- (b) Are not in receipt of another form of compensation for their driving service;

- (c) Do not profit for the service of driving the van; and/or
- (d) Incur a cost for participating in the van pool.

(4) If van pool operators need advice on QMOT eligibility requirements, the operator should consult with his or her own private attorney, accountant, etc., to determine whether the requirements are met.

(5) Van pool riders who must pay to “hold” their space in the van pool due to extended absence (e.g., TDY or leave) or part-time work schedule are responsible for the cost of holding their space. This expense may not be included in commuter cost calculations. Exceptions to this policy will be made on a case-by-case basis by the local PM and the MTBP PM. (6)

(6) (Added)(DAF) Public or commercial transit companies should register van pool vehicles with the local transit authority as required by the state. Companies should be eligible to receive fare media compatible with local systems. In addition, companies are required to submit written certification that state requirements are met, or, if state registration is not mandated, a written certification that regulatory requirements are met, to local PMs. (T-0)

(7) (Added)(DAF) To be considered a QMOT, the van must be used 80% of the time for transporting employees to and from work. (T-0) In addition, the van must seat at least 6 passengers (not including the driver) and must have 50% of the adult seating capacity of the vehicle (not including the driver) occupied. (T-0) This is known as the QMOT rule.

(8) (Added)(DAF) Vanpools that fail to meet the 80/50 rule for three months within a calendar year may be required to reimburse the federal government for transit benefits received during the non-compliant months. Participants may also face suspension from the program up to 90 days requiring withdrawal and reenrollment upon approval.

(9) (Added)(DAF) Exceptions to these penalties may be requested in writing to the MTBP PM, citing extenuating circumstances. Requests will be reviewed on a case-by-case basis. Reimbursement requirements may be waived at the discretion of the agency head. (T-3)

(10) (Added)(DAF) All van pool riders, whether federal employees or nonfederal employees, must pay the same rate for van pool services. (T-0) Van Pool providers will furnish a written invoice or contract clearly showing the cost for each participant. Participants should submit the contract/lease to the local PMs. The local PMs should keep this information on file to help support the annual reconciliation requirement. (T-0)

(a) (Added)(DAF) Although most vanpool providers charge a monthly fee divided by the total number of riders (based on fixed and variable costs for that month), participants may determine their monthly vanpool cost either (1) based on the total number of seats in the vanpool or (2) by submitting their work schedule to a vanpool company and using the resulting invoice or price quote as the monthly cost. Participants must calculate their claimed benefit amount based on one of the methods described above (i.e., the total number of seats in the vanpool or a vanpool company invoice or price quote generated based on the participant's work schedule). (T-0) Any difference is the responsibility of the rider and may not be claimed as part of the benefit. The cost of any empty seats is the responsibility of the riders, and the monthly benefit amount may not be increased to cover the cost of empty seats.

(11) (Added)(DAF) Van pools should make every effort to fill as many seats as possible, in order to reduce the costs for which riders are personally responsible. Van pool groups are also encouraged to work with their provider to obtain a vehicle whose seating capacity best accommodates the size of the group. Van pool riders who must pay to "hold" their space in the van pool due to absence or part-time work schedule are responsible for the cost of holding their space. Participants must exclude the cost of holding their space in the van pool from calculations of commuter costs. (T-0)

(12) (Added)(DAF) Privately owned vehicles, rental vehicles, personal carpools, ride sharing by individual riders often referred to as "slugs," and employee purchased vans do not meet the requirements under Section 132(f) of reference (e).

(13) (Added)(DAF) Van pool manager. The van pool manager is designated by the van pool riders to serve as treasurer for the group and must determine the cost per participant, receive smartcards, debit or credit cards or other fare media to submit to the provider for payment. (T-1) Van pool managers will:

(a) (Added)(DAF) Provide a written invoice or contract clearly showing the cost for each participant prior to issuing fare media. (T-1)

(b) (Added)(DAF) Collect copies of signed receipts from van pool riders to document the actual commuting cost for van pool participants. (T-1)

(c) (Added)(DAF) Ensure invoices and receipts are provided monthly to the local PM. (T-1) For van pool companies that issue individual receipts for each participant, the actual commuting cost for that individual should equal the amount on the invoice or receipt. For van pool companies that issue one invoice for the entire van pool, the actual commuting cost for each individual should equal the total amount of the invoice divided by the number of seats in the vehicle regardless of whether those seats are currently occupied by a rider.

(d) (Added)(DAF) Maintain a van pool log to document, on a daily basis, which participants are using the van pool to commute to and from work. (T-1)

(e) (Added)(DAF) Ensure all participants sign the van pool log at the end of the month to certify that the van pool log accurately reflects the participant's actual riding history. (T-1)

(f) (Added)(DAF) Ensure logs are provided to the local PM by the specified calendar day of the following month for review and maintenance. (T-1)

(g) (Added)(DAF) Notify the local PM within the review period if participants are not using the van pool for at least 50% of the working days of the month. (T-1)

(h) (Added)(DAF) Obtain a refund from the van pool provider if there is a surplus left on the account at the end of the month. (T-1)

(i) (Added)(DAF) Assist local PM in determining if circumstances require reimbursement from the participants. (T-1)

(14) (Added)(DAF) Van pool riders. Participants riding in van pools must:

(a) (Added)(DAF) Ride in a qualified van pool for at least 50% of the working days in a month. (T-0)

(b) (Added)(DAF) Accurately claim the amount that reflects their actual anticipated expenses. (T-0)

(c) (Added)(DAF) Recalculate estimated costs based on number of days of actual van pool utilization. (T-0)

(d) (Added)(DAF) Pay the cost of holding a seat. (T-0)

(e) (Added)(DAF) Ensure updates are made in the electronic system for all changes to application status or extended absences (temporary duty, jury duty, short term leave, and unforeseen extenuating circumstances) for the following month. (T-0)

(f) (Added)(DAF) Review, verify and sign logs and receipts/invoices for van pool manager by agreed upon date. (T-0)

(g) (Added)(DAF) Ensure excess funds are returned to the DAF, if there is a credit on the van pool account. (T-0)

(h) (Added)(DAF) Van pool riders may be required to repay to the DAF the pro-rated amount for the entire number of working days that a QMOT was not used.

ENCLOSURE 6

SUBSIDIZED PARKING

1. A military member or DoD civilian or NAF employee who receives subsidized parking is not eligible to participate in the MTBP.
2. Subsidized parking refers to a space, which may be occupied by a POV, including motorcycles, and which the Government owns or pays any part of the cost. Subsidized parking includes:
 - a. Parking spaces specifically reserved for an individual by name or title.
 - b. General parking spaces for which an applicant must register and obtain a parking permit.
 - c. Spaces in a commercial lot for which the Government has obtained preferred or discounted rates.
 - (1) These rates may be obtained through terms included in negotiated lease agreements in buildings occupied by DoD employees or members of the Services.
 - (2) Spaces may be located on or in:
 - (a) Government installations.
 - (b) Leased buildings.
 - (c) Government-owned buildings.
 - (d) Areas adjacent or located in the vicinity of Government installations or leased buildings.
3. Issuance of a decal for entrance onto a military or DoD facility does not constitute subsidized parking.
4. Installations and commands must establish standard operating procedures that govern parking for employees who are MTBP participants. At a minimum these procedures must require:
 - a. Participants to relinquish assigned parking spaces as a condition of participation in the MTBP. Exceptions to this policy will be made on a case-by-case basis by the command or installation MTBP PM.

b. Periodic reconciliation of parking registrant and MTBP applicant records and/or databases to identify for corrective action those receiving benefits under both programs where automated systems enable cross-referencing of data. DoD Component policies will prescribe a procedure for periodic reconciliation of available parking records to MTBP participants to ensure program integrity.

ENCLOSURE 7

CALCULATING COMMUTING COSTS

1. Participants shall estimate their monthly commuting costs, based on the actual average number of days they use mass transportation. Parking costs, tolls, and van pool ferry cost shall not be used in establishing commuter costs, nor shall costs for holding van pool space.

2. In order to calculate commuting expenses:
 - a. Compute the monthly cost by multiplying the daily commute cost by the average number of days when mass transportation will be used. There are 21 workdays in an average month for a participant working full time and commuting 5 days per week.

 - b. Part-time employees or participants not using mass transportation for every workday, or working compressed work schedules, will calculate costs based only for days commuting to and from the workplace using a QMOT.

 - c. All participants must work in a prudent manner to purchase the most cost-effective combination of fare media available. For example, if a monthly pass costs less than four weekly passes or 21 daily passes, the participant must purchase the monthly pass. Similarly, if a participant uses mass transportation 10 days out of a month and 10 daily passes are less than a monthly pass, he or she must purchase the daily passes. MTBP application should provide information regarding commuter choices to facilitate applicant's ability to determine most cost-effective fare media.

3. Applicants' commuting costs shall be verified by the DoD Component's designated RO to the extent practicable.

4. In those locations where the Department of Transportation (DOT) purchases fare media from local transit authorities, the fare media issued to each participant will be based on the denominations purchased by DOT from local transit vendors. In some locations, the denominations issued do not provide the flexibility to exactly match the employee's monthly allowance. In those cases, participants may receive more than their monthly allowance. For example, if the participant is claiming \$58, DOT may send fare media totaling \$60 as a result of not having exact denominations. When fare media exceeds actual costs, the difference will be absorbed into the local transit system. Participants are not authorized to receive change from a vendor for fare media they submit. DOT does not issue fare media in denominations less than \$1.

5. A participant may not accrue and stockpile unused fare media from one disbursement period to be used in a subsequent disbursement period so as to reduce their own out-of-pocket expenses.

6. When the amount of the MTB received in previous disbursement periods exceeds the amount needed (e.g., due to unforeseen leave or TDY), participants must adjust their calculations of commuting costs in the following disbursement period, or reimburse the Government via applicable DoD Component guidelines.

ENCLOSURE 8

CRITERIA FOR SUBMISSION OF CLAIMS

1. Participants shall not make false claims overstating commuting costs or claim costs for days they did not commute to work via a QMOT.
2. Claims shall only be submitted when they meet the program criteria as stated in this Instruction.
 - a. Claims can be made for the days an employee uses a QMOT to commute to work. PMs may make an exception when a monthly fare media is less expensive than a claim made for individual days of ridership.
 - b. Claims for part-time work for participants, including teleworkers and those on compressed work schedules, are calculated based on the actual number of days they commuted to and from work or a designated telework center.
3. Claims are not permitted:
 - a. On a retroactive basis for disbursement of fare media. Delays between the date of application for the MTBP and approval of the application are not an exception.
 - b. For commuting costs while on TDY status. Participants on TDY should make claims for reimbursement of actual transportation costs incurred via travel vouchers through appropriate programs or procedures and funds established for that specific purpose.
 - c. While the participant is on leave unless the leave is used during the workday and does not preclude commuting to or from the worksite via a QMOT.
 - d. If the participant is named on a federally subsidized workplace motor vehicle parking permit (including motorcycles) unless otherwise provided in Enclosure 7.
 - e. If the participant has separated from the Department of Defense or from the command. Participants who make a change in permanent duty station may be required to reapply in the MTBP at the new duty station or work location.
4. Participants must return unused fare media received for future months if they have lost eligibility for the DoD MTBP, electively withdrawn from the program, or unused fare media is remaining. DoD Component procedures for fare media return must be followed. Participants who do not return unused fare media must make a repayment to the DoD Component before they leave DoD employment status.

5. SF 1164 may be used as a method of reimbursement for the MTBP in areas where transit fare media are not available. OPRs, MTBP PMs, and/or resource managers will have joint responsibility for approval and administration of the SF 1164 portion of the MTBP.

a. Participants will refer to their local procedures for completion and submission of the SF 1164. At a minimum, the SF 1164 should include:

(1) That reimbursement is being sought under the DoD MTBP.

(2) The method of transportation used.

(3) The period for which reimbursement is being sought.

(4) The amount of reimbursement being sought, with the basis for the calculation.

(5) Certification that the costs reflect only those accrued for transportation back and forth to work via a QMOT.

b. The resource manager or other designated individual will forward the SF 1164 to the appropriate paying entity for processing.

c. Participants will be reimbursed through electronic funds transfer. The payment will be directly deposited into the account that the participant has designated for receipt of their salary.

6. Subject to the rules under Reference (i), payments correctly received under the MTBP are not considered income for the purpose of income tax.

7. (Added)(DAF) Temporary employees appointed for 30 days or less, and Reserve or USSF members who are performing active duty for 30 days or less, may use the OF 1164 reimbursement method in accordance with local procedures. Temporary appointment employees with a term of more than 30 days may apply electronically to receive the benefits.

GLOSSARY

PART I. ABBREVIATIONS AND ACRONYMS

AC Active Component
(Added)(DAF) AFR Air Force Reserves (Added)(DAF) ANG Air National Guard

(Added)(DAF) DAF Department of Air Force
(Added)(DAF) DAFI Department of Air Force Instruction
(Added)(DAF) DAFPD Department of Air Force Policy Directive
DASD(CPP) Deputy Assistant Secretary of Defense for Civilian Personnel Policy
DFAS Defense Finance and Accounting Service
(Added)(DAF) DoDI Department of Defense Instruction
DOT Department of Transportation
DUSD(CPP) Deputy Under Secretary of Defense for Civilian Personnel Policy

(Added)(DAF) FLDCOM Field Command

IG DoD Inspector General of the Department
IG DoD Inspector General of the Department of Defense

(Added)(DAF) MAJCOM Major Command

MTB mass transportation benefit
MTBP Mass Transportation Benefit Program

NAF nonappropriated fund
NAFI nonappropriated fund instrumentality
NCR National Capital Region

(Added)(DAF) OF Optional Form

ONCR outside the National Capital Region
OPR office of primary responsibility

PM program manager
POV privately owned vehicle

QMOT qualified means of transportation

RC Reserve Component
RO reviewing official

SF Standard Form

TDY Temporary duty

U.S.C. United States Code
USD(P&R) Under Secretary of Defense for Personnel and Readiness
(Added)(DAF) USSF United States Space Force

WHS Washington Headquarters Services

(Added)(DAF) *Office Symbols*

Added)(DAF) AF/A1—Air Force Deputy Chief of Staff, Manpower, Personnel and Services

(Added)(DAF) AF/A1C—Director, Air Force Civilian Force Management Directorate

(Added)(DAF) AF/A1XR—Air Force Directorate of Plans & Integration, Resources Division

(Added)(DAF) AF/RE—Chief of the Air Force Reserve

(Added)(DAF) NGB/CF—Director of the Air National Guard

(Added)(DAF) SAF/MR—Assistant Secretary of the Air Force, Manpower and Reserve Affairs

(Added)(DAF) SF/S1—Deputy Chief of Space Operations for Human Capital

PART II. DEFINITIONS

These terms and their definitions are for the purpose of this Instruction.

active duty military members. Full-time duty in the Active Service in an AC, RC, or USSF. In the case of an RC member, such service shall be under a call or order to active duty as defined in Section 101 of Title 37, U.S.C. (Reference (j)).

(Added)(DAF) active duty Space Force members. Sustained duty in the Space Force, and active duty performed as a member of the Space Force Active Status not on sustained duty (SFAS-NSD) ([SPFGM2025-36-02, Table 1](#)).

cash reimbursement arrangement. A nontaxable cash payment, in addition to regular compensation, by the Department of Defense to its MTBP participants for expenses incurred or paid for fare media or van pools. The term “cash reimbursement” does not include cash advances. A cash reimbursement arrangement is not authorized when vouchers are readily available.

disbursements. For the DoD MTBP, the act of providing a voucher to trade for fare cards, or other acceptable form of payment for mass transportation to commute to and from the workplace or a designated telework center, prior to an upcoming period.

distribution. Act of disbursement of the MTB to participants via a voucher or other fare media.

DoD MTBP. A DoD program whereby the Department of Defense provides fare media or implements a cash reimbursement arrangement for participant commuting costs to reduce traffic congestion, air pollution, and to expand participant commuting alternatives.

fare media. Any pass, token, farecard, voucher, or similar item that entitles a person to transportation: (a) on mass transit facilities (whether or not publicly owned); or (b) in van pools owned and operated either by public transit authorities or by a person in the business of transporting persons for compensation or hire. A voucher is an item that may be exchanged only for fare media.

ferry. A boat used for carrying passengers across a river or other body of water. (See Enclosure 6 for information on the use of a ferry as a QMOT.)

(Added)(DAF) Local MTBP PM. The individual assigned by the local command or installation to support the MTBP and is responsible for implementing, monitoring, and assessing the local program. May also serve as the reviewing official.

(Added)(DAF) myPers/myFSS. The Department of Air Force official online tool for personnel policies, day to day transactions, and empowering Airmen and Guardians to manage their careers.

NCR. Includes the District of Columbia; Montgomery, Prince George's, and Frederick Counties in Maryland; Arlington, Fairfax, Loudoun, and Prince William Counties in Virginia; and all cities now or hereafter existing in Maryland and Virginia within the geographic area bounded by the outer boundaries of the combined area of said counties.

OPR. The organizational entity with responsibility for management of the DoD Component MTBP PM. The local command or installation individual responsible for implementing, monitoring, and assessing the local program. The PM may also serve as the RO.

ONCR. The 50 states (exclusive of the area included in the definition of the NCR), the Commonwealth of Puerto Rico, the Virgin Islands, Guam, American Samoa, and the Commonwealth of the Northern Mariana Islands.

PM. Individual assigned duties by the local command or installation to support the OPR in the administration of the local program.

QMOT. Commercial or public transportation operated for use by the general public and/or modes of transportation that meet the requirements of Reference (i).

readily available. A transportation voucher or similar item that a DoD Component can obtain: (a) on terms no less favorable than those available to an individual member or employee; and (b) without incurring a significant administrative cost.

recertification. The process by which a qualified participant confirms his or her eligibility to continue to receive the transit subsidy. Recertification may be accomplished through required re-enrollment.

reimbursement. For areas where fare media are not available, payment of MTB to a participant after the transportation has occurred and an appropriate claim has been made and approved.

repayment. Participant or former participant reimbursement to the DoD Component following an overpayment.

RO. Local individual responsible for reviewing program requirements, providing information to participants, receiving certifications from participants, and reviewing applications for completeness and compliance with eligibility requirements.

self-certify. Confirmation that occurs during the initial application, change in application, and/or recertification process, whereby the eligible employee reads a certification statement that outlines all program requirements, and agrees to abide by those requirements, by his or her written or electronic signature.

subsidized parking. Parking that is owned by the Government or for which it pays any part of the cost. Subsidized parking includes parking spaces, specifically reserved for an individual by name or title. (See Enclosure 7 for subsidized parking information.) Subsidized parking does not include installation access decals on POVs.

telework. An arrangement in which an employee performs officially assigned duties at an alternative worksite on either a regular and recurring or an ad hoc basis (not including while on official travel). Telework locations may be the employee's home or a telework center.

telework center. A designated site set up with computer(s) and telephone(s), specifically provided for use by teleworkers, that enables employees to work at an alternative work location.

transportation benefit. A nontaxable benefit whereby the Department of Defense provides vouchers or similar items in amounts that do not exceed personal commuting costs, up to the maximum amount allowed by Reference (e).

transit subsidy. A nontaxable transportation benefit providing employees with vouchers or other fare media to commute via mass transit to and/or from work up to the maximum amount allowed by Reference (e).

van pool. A commercially owned highway vehicle with seating capacity for AT LEAST six adults, not including the driver, and that meets the QMOT requirements identified in Enclosure 5.

voucher. A non-monetary item that may be exchanged only for fare media that serves as payment for use of a QMOT under this program, such as a transit pass or van pool payment.