

**Transit Subsidy**  
**Instructions for Completing Claim for Reimbursement**  
**Standard Form 1164**

**1. General Guidance**

- a) The Transportation Subsidy Participants must submit a Claim for Reimbursement: Standard Form (SF) 1164 to receive reimbursement for their qualifying mass transit commuting costs up to the maximum statutory limit for 2013, \$245.
- b) Submit request(s) for reimbursement: SF 1164, if authorized by the Transportation Subsidy Program Manager and Coordinator:
  - i. In general, services cannot be paid in advance. The expenses must be incurred prior to claiming the reimbursement.
  - ii. Participants that pre-paid their entire monthly benefits may request reimbursement on a single claim form.
  - iii. Participants that have paid their monthly benefits, either on a daily or weekly basis, may request reimbursement on multiple claim forms.
  - iv. Participants that have not incurred qualifying commuting costs cannot submit claim forms for reimbursement.
  - v. Each qualifying day, week, or month is itemized on the form.
- d) Provide receipts for out of pocket expenses. Failure to furnish receipts, when applicable, will be fully explained on the form.
- e) Submit completed form(s) to the Transportation Subsidy Coordinator for review, prior to submission of claim form(s) to your bureau/office human resources or budget office.
- f) Transportation Subsidy Coordinators must print, sign and date the SF 1164 in the top right hand corner.
- g) Transportation Subsidy Coordinator and Claimant retain records/receipts of each claim.

**2. Preparing a Claim**

- a) The participant will prepare the Standard Form 1164 and submit required receipts.
- b) Submit the original or copied form. One record copy should be retained by the originator. The back of the form should be used if more space is needed for lengthy claims.
- c) Prepare the claim as follows:
  - i. Block 1: Complete bureau/office name and address of office handling the SF 1164 for the employee (i.e. SF1164 contact).
  - ii. Block 4: Provide your complete legal name (as it appears on your salary payment), Last Four Digits of your Social Security Number, complete home mailing address, and office phone number of SF 1164 contact.
  - iii. Block 6: Must contain dates of service, detailed description, notate *Transit Subsidy Increase 2013*, and amount of expenditures in appropriate columns.
  - iv. Block 7: Enter in the amount claimed.
  - v. Blocks 8 & 10: Approving Official (supervisor or manager) and Claimant must provide signatures and dates in appropriate boxes. Please print the approving official name below the signature if it's difficult to read.
  - vi. Block 9: Authorizing Certifying Officer (bureau/office human resources or budget office representative) must provide signature and dates in appropriate box.
  - vii. Accounting Classification Block (at the bottom of the form): Must provide valid Fund, Fund Center, Functional Area, WBS Element, Budget Period, and Budget Object Code(s) (BOCs) for each accounting element breakdown, if applicable.

**3. Processing Claims**

Claims will be returned if all signature blocks are not completed. Claims must be submitted to the appropriate bureau/office human resource or budget for processing. Forms will be reviewed for appropriateness of expenditures and accuracy and then submitted for payment.