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# 1.0 <u>RESPONSIBILITY</u>

The Executive Vice President, Chief Human Resources Officer, is responsible for the interpretation and administration of this policy. While exceptions are discouraged, in the event a manager believes an employee's exception request warrants consideration, a request should be forwarded to <a href="mailto:HRCompliance@amtrak.com">HRCompliance@amtrak.com</a> for possible consideration by the Executive Vice President, Chief Human Resources Officer.

## 2.0 <u>PURPOSE</u>

This policy defines guidelines for use and administration of Amtrak's free and reduced-rate pass travel benefits.

# 3.0 SCOPE

This policy applies to all Amtrak employees, retirees, spouses, dependents, and others, as indicated in Section 6 below. To the extent there is a conflict between the law or collective bargaining agreement and a provision of this policy, employees will be afforded all rights required by law or the applicable collective bargaining agreement. Nothing in this policy shall be construed as a contract of employment between Amtrak and any employee, as conferring a right on any employee to continue his or her employment with Amtrak, or as limiting Amtrak's right to discharge any of its employees with or without cause. Amtrak reserves the right to use its sole and absolute discretion to revise, supplement, or rescind the policy or any portion thereof, as it deems appropriate.

## 4.0 DEFINITIONS

- 4.1 <u>Executive</u>. A member of Amtrak's Executive Leadership Team (ELT) and other E-Band employees granted executive privileges by the ELT.
- 4.2 <u>Board of Directors</u>. Individuals appointed to Amtrak's Board of Directors pursuant to 49 USC §24302.
- 4.3 <u>Business Travel</u>. Travel undertaken for work or business purposes. Traveling between work and home (i.e. commuting) is generally not considered business travel.
- 4.4 <u>Deadheading</u>. Travel undertaken for the purpose of work where the employee is in a non-working status while on the train (for example, from his or her reporting location to an assignment at another location or from one completed assignment in one location to a new assignment in another location).
- 4.5 <u>Dependent</u>. An employee's biological children, stepchildren (provided they live with the employee), adopted children, and other children related to the employee by blood or marriage (provided they live with the employee and are declared as dependents for tax purposes).

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- 4.6 <u>Disabled Employee</u>. An inactive employee who is receiving Railroad Retirement Board (RRB) disability annuity benefits or long-term disability benefits from Amtrak due to a disability the employee experienced while an active Amtrak employee.
- 4.7 <u>Employee ID Card</u>. An ID card issued to active Amtrak employees (sometimes referred to as a Smart ID card).
- 4.8 <u>Freight Railroad Employee</u>. Active and retired freight railroad employees hired on or before April 30, 1971 and who had pass privileges on that date.
- 4.9 <u>Pass Card</u>. An identification card issued to all Amtrak retirees, Executives, members of Amtrak's Board of Directors, spouses, domestic partners, eligible dependents, certain Union Officials, and freight railroad pass riders (upon request).
- 4.10 <u>Pass Holder</u>. The primary individual pass holder (active employee, retiree, Freight Railroad employee, Executive, members of Amtrak's Board of Directors, or Union Official) who designates pass privileges to spouses, domestic partners and dependents.
- 4.11 Pass Privileges. Benefits granted to the pass holder.
- 4.12 <u>Pass Rider</u>. An individual traveling under pass privileges.
- 4.13 Retiree. For purposes of this policy, a retiree is a former Amtrak employee who is at least age 55 years old with 10 years of Amtrak service or at least age 60 years old with 5 years of Amtrak service or a former employee who had been elected to a full-time position with a union (on a leave of absence from Amtrak), who has retired from that position, and who meets the age and service requirements described herein.
- 4.14 <u>Surviving Spouse / Domestic Partner</u>. A surviving spouse or domestic partner of a deceased Amtrak pass holder who has not entered into a subsequent legal marriage or domestic partnership.
- 4.15 <u>Ticket</u>. A document, whether in electronic or paper form, that entitles the holder to travel as described in the document.

#### 5.0 POLICY

It is the policy of Amtrak to provide free and reduced-rate transportation to employees and other designated groups for business and personal travel, as described in this policy.

## 6.0 ELIGIBITY FOR PASS PRIVILEGES

The following individuals are eligible for pass privileges:

- Active employees including Executives, spouses, domestic partners, and dependents
- Retired employees including retired Executives, spouses, domestic partners, and dependents

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- Members of Amtrak's Board of Directors and their spouses, domestic partners and dependents
- Interns/Co-Op Participants
- Disabled employees
- Freight employees
- Certain senior union officials

## 7.0 REQUESTING PASS PRIVILEGES

Pass privileges are typically applied at the time of an associated employment status change (for example, upon hiring, retirement, or upon the employee's move to Executive status). Travel privileges for spouses or domestic partners and dependents are not automatic; pass riders must submit a request for travel privileges for spouses, domestic partners and dependents through www.amtrakbenefits.com as soon as possible after the hire date or, in the case of a current employee, upon the triggering event (for example, upon marriage or the birth of a child). Supporting documentation may be required to authenticate the relationship.

## 8.0 DURATION OF PASS PRIVILEGES

Pass privileges begin and end as follows:

- 8.1 <u>Employees</u>. Pass privileges begin upon hire and end upon resignation, retirement, death, or upon the request of the employee's manager due to disciplinary action or some other work-related reason. Business pass privileges also end if the management employee moves to an agreement position.
- 8.2 <u>Retirees</u>. Pass privileges begin upon retirement and end upon death.
- 8.3 Spouse or Domestic Partner. Pass privileges begin upon marriage and following receipt of a request and supporting documentation, if applicable. Pass privileges end if the marriage or domestic partnership between the employee and spouse or domestic partner is dissolved. Pass privileges of a surviving spouse, domestic partner and dependents end when the surviving spouse or domestic partner dies, remarries or enters into a new domestic partnership.

## 8.4 Dependent Children.

- 8.4.1 <u>Biological Children</u>. Pass privileges begin upon the child's birth and following receipt of a request and supporting documentation, if applicable.
- 8.4.2 <u>Stepchildren</u>. Pass privileges begin on the date the employee married the spouse who is the biological parent of the employee's stepchildren (or entered into legal domestic partnership with the biological parent of the stepchildren) and upon receipt of a request and supporting documentation, if applicable.
- 8.4.3 <u>Adopted Children</u>. Pass privileges begin on the date legal adoption proceedings are finalized and upon receipt of a request and supporting documentation, if

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applicable.

- 8.4.4 A dependent child's pass privileges end upon:
  - The child's 19<sup>th</sup> birthday, if not a full-time student, unless the child is disabled as defined by the Americans with Disabilities Act (ADA).
  - The child's 25<sup>th</sup> birthday, if a full-time student. Written proof of student status must be provided to the Amtrak Pass Bureau for each year the child remains a full-time student.
  - The employee divorces or the domestic partnership is dissolved, and the employee is neither the biological parent nor the legal custodian of the child.
- 8.5 <u>Disabled Employee</u>. Pass privileges begin when Human Resources receive the disability annuity benefits award letter from the RRB and end upon death or the cessation of benefits.
- 8.6 <u>Interns.</u> Pass privileges begin upon hire and end when the intern's assignment with Amtrak is completed.
- 8.7 <u>Executives</u>. Executive pass privileges begin upon attaining Executive status and end upon resignation, termination, death, or upon moving from executive status. Executives retain executive pass privileges following retirement in accordance with Section 13.3 below.

# 9.0 GENERAL PASS RIDER RULES

The following rules apply for all pass rider travel, unless specifically noted.

- 9.1 <u>Accommodating Revenue Passengers</u>. When there is a shortage of space, revenue passengers have priority. A pass rider must vacate his or her seat, room, or table to accommodate a revenue passenger who cannot otherwise be accommodated due to crowded conditions or other operational necessity.
- 9.2 <u>Pass Rider Behavior</u>. A pass rider's behavior must reflect favorably on his or her status as an Amtrak representative. Pass holders will be held responsible for the behavior of dependent pass riders.
- 9.3 <u>Alcohol and Drug Consumption</u>. Pursuant to the Drug and Alcohol-Free Workplace Program policy, P/I 7.3, employees are prohibited from consuming illicit drugs or alcohol while traveling under pass privileges. All other pass holders using personal pass travel privileges may consume alcohol while on the train.

# 10.0 PASS PRIVILEGES FOR BUSINESS TRAVEL

When authorized to travel for business, employees may book travel or present their Employee ID Card "flash pass" for travel on eligible trains / routes for reserved or unreserved coach travel. All other business travel requires a reservation and a ticket.

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- 10.1 <u>Eligibility for Business Travel</u>. The following employees are authorized for business travel.
  - Management employees who are required to travel as part of their duties.
  - Agreement employees are issued business travel privileges if their duties require frequent travel and if a multiple-trip travel voucher will not suffice to complete the employee's duties.
  - 10.1.1 Contractors. Contractors with a valid need to travel may utilize travel vouchers.
  - 10.1.2 <u>Application Privileges</u>. Employees may apply for business travel privileges by submitting Form NRPC 3265 Business Pass Privilege Request.
  - 10.1.3 <u>Interns and Co-Ops.</u> Interns and Cooperative Education Program participants with a valid need to travel may utilize travel vouchers.
- 10.2 <u>Acela Travel</u>. Any employee who has business travel privileges can ride Acela business class as long as the reservation is made within one hour of train departure. This will apply up to and including the ELT.
- 10.3 <u>Non-Acela Business Class</u>. Employees must be ticketed for non-Acela business class seats.
- 10.4 <u>Sleeping Accommodations</u>. If available, business travel riders may reserve business travel roomettes.
- 10.5 <u>Dormitory Cars.</u> Non-working pass riders are prohibited from occupying dormitory space reserved for the crew.
- 10.6 Meals. Management employees on business travel must pay for all meals and beverages purchased during travel, including when traveling in an accommodation such as a revenue sleeper. Monies may be recouped in accordance with Amtrak policies. Note: "Deadheading" means travel in a non-working status between the employee reporting location and another location where actual work will begin, or travel from a location where actual work has ended back to the employee normal reporting location. Meals and other entitlements are governed by the labor agreement that applies to such travel. Travel between the reporting location and home is commuting and not "deadheading."
  - 10.6.1 <u>Complimentary Meals / Beverages</u>. Coffee, tea and other beverages provided in the sleeping car or during a service disruption, or as part of Acela service, are complimentary and need not be expensed.

## 11.0 COMPANION PASS

Amtrak provides current employees the opportunity to have a guest accompany them while using their personal travel privileges. Companion passes will be issued annually, must be used before the end of the calendar year, and will not rollover.

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- 11.1 <u>Companion Pass Rules</u>. The following rules apply:
  - Companion privileges are accessible while personal privileges are active.
  - Employees must accompany the companion on all segments of the trip and travel in like accommodations (with the exception of passengers with disabilities).
  - Companion passes are for use on "Blue" or "White" days only (See section 12.0 below). Employees may not flash their ID card for free travel while traveling with a companion using a companion pass.
  - Companions must present valid photo ID for travel.
- 11.2 <u>Restrictions</u>. Companion travel is not permitted on Acela or Auto Train.
- 11.3 <u>Pass Holder Designees</u>. Companion travel is not extended to spouses, dependents and retirees.
- 12.0 PASS PRIVILEGES FOR PERSONAL TRAVEL (EMPLOYEES (NON-EXECUTIVES), RETIREES (NON-EXECUTIVES), SPOUSES / DOMESTIC PARTNERS AND DEPENDENTS)

Non-Executive employees and non-Executive retiree pass riders as well as their spouses and dependents may book travel or present (flash) their Employee ID Card or Pass Card for free personal travel onboard certain Amtrak trains. A reservation and ticket are required for domestic partners.

- 12.1 "Red", "White" and "Blue" Fares. On trains where flash passing is unauthorized, pass riders must adhere to a cost-sharing framework. Each train, class of service and departure date is coded as a "red", "white" or "blue" fare. The pass rider's share of the travel cost is dependent on the color of the fare. The "red", "white" or "blue" designation is determined by space availability and other business-related considerations. The color of the fare assigned to the travel, if any, is viewable by the pass rider in the travel booking system at the time of booking.
  - 12.1.1 For "red" fares, the pass rider pays 80% of the rail fare and accommodation charge that a member of the public would pay for the same travel. In the event that space remains unsold at time of departure, no refund will be issued.
  - 12.1.2 For "white" fares, the pass rider pays 80% of the rail fare and accommodation charge that a revenue passenger would pay for the same travel. If, at time of travel, unsold space remains in the same type of service (coach seat, roomette, bedroom, etc.), the employee is entitled to a refund of the amount paid less any fees that apply (e.g. sleeper accommodation fee). Fees are deducted from the refund. See Appendix: Pass Privilege Policy Fees for a current list of fees.
  - 12.1.3 For "blue" fares, the pass rider pays no fare unless seating availability drastically changes; however, additional fees may apply for pass travel on a particular route or class of service. For "blue" fares, fees are paid at booking. See Appendix: Pass Privilege Policy Fees for a current list of fees.

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- 12.2 <u>Acela, Non-Acela Business Class and Sleeping Cars</u>. Pass riders must obtain a reservation and ticket for travel on Acela, in business class on non-Acela trains and in sleeping cars. The tickets must be obtained prior to boarding and personal travel on Acela is only available to pass travelers one hour prior to departure. Pass riders are prohibited from travelling in business class on non-Acela trains when traveling to and from work (i.e. commuting).
- 12.3 <u>Auto Train</u>. Auto Train travel must be reserved and ticketed under the rules defined in Section 12.1 above. Coach, sleeper, and vehicle space are individually designated as "red", "white" or "blue". Additional fees apply for pass travel on the Auto Train. See Appendix: Pass Privilege Policy Fees for a current list of fees.
  - 12.3.1 <u>Sleeping Accommodation</u>. Personal pass riders may book sleeper space in advance under the rules stated in Section 12.1 above.
  - 12.3.2 <u>Vehicles</u>. One vehicle per licensed driver is allowed, and the number of vehicles priced at pass rider fares may not exceed the number of pass riders who are licensed drivers. Pass riders may not ride Auto Train without a vehicle unless specifically authorized by the Auto Train District Manager. Vehicles may not be shipped unless the pass rider is also traveling on the same train. Pass riders may not purchase "priority vehicle offboarding" services.
- 13.0 PASS PRIVILEGES FOR PERSONAL TRAVEL (CURRENT AND RETIRED EXECUTIVES (SPOUSES / DOMESTIC PARTNERS, SURVIVING SPOUSES / DOMESTIC PARTNERS, AND DEPENDENTS))
  - 13.1 <u>Current Executives</u>. Executives, their spouses and dependents may travel onboard any Amtrak train without adherence to "red", "white" or "blue" travel rules described in Section 12.1 above. They also have unlimited access to ClubAcela, Metropolitan lounges, and first-class waiting areas, with or without a qualifying ticket.
  - 13.2 <u>Retired Executives</u>. Retiring Executives must have a minimum of one (1) year of service as an Executive, in addition to meeting Retiree eligibility, in order for the Executive Retiree and their spouse to retain Executive Business Travel privileges as described in 10.2 above. Dependents of retired Executives and retired Executives with less than one (1) year of service as an Amtrak Executive, as well as their spouses and dependents receive standard Retiree personal travel benefits.
  - 13.3 <u>Executive Surviving Spouse/Domestic Partner</u>. Upon the death of an employee with at least five (5) years' Amtrak and / or eligible railroad service, his or her surviving spouse or domestic partner, will be eligible for standard personal travel benefits.
  - 13.4 <u>Renewal</u>. Executive passes will be automatically renewed as long as the employee remains eligible.

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# 14.0 PASS PRIVILEGES FOR CURRENT AND FORMER AMTRAK BOARD OF DIRECTORS, SPOUSES / DOMESTIC PARTNERS, AND DEPENDENTS

Current members of Amtrak's Board of Directors, their spouses or domestic partners, and dependents as well as former members and their spouses or domestic partners may book the following travel at no charge, without restriction and at any time before travel. A reservation and ticket are always required.

- Unreserved or reserved coach
- Business Class (Acela and non-Acela)
- First class (Acela)
- Sleeping Car (all room types)
- Auto Train
- Thruway Service

# 15.0 PASS PRIVILEGES FOR FREIGHT RAILROAD EMPLOYEES, RETIREES, SPOUSES / DOMESTIC PARTNERS, DEPENDENTS, AND SURVIVING SPOUSES

- 15.1 <u>Active Employees</u>. Active Freight Railroad employees hired on or before April 30, 1971 and who had pass privileges on that date as well as their spouses and dependents, may be eligible for pass privileges. A reservation and ticket are required. Employees should contact their freight railroad to apply or make changes to existing passes.
- 15.2 <u>Retirees</u>. Freight railroad retirees hired on or before April 30, 1971 retain pass privileges if they retired directly from railroad employment and pass privileges were intact at the time of retirement.
- 15.3 <u>Surviving Spouse / Domestic Partner</u>. The surviving spouse is eligible for survivor pass privileges if the spouse had pass privileges at the time of the Freight Railroad employee's death or the Freight Railroad employee had a hire date on or before April 30, 1952.

#### 16.0 PASS PRIVILEGES FOR UNION OFFICIALS

Senior officers of Amtrak's labor organizations are eligible for pass privileges in reserved and unreserved coach, for business purposes only. Travel on Acela for business is allowed, so long as the reservation is made within one (1) hour of train departure. Pass cards are valid for one (1) year and are managed by Amtrak's Labor Relations department. A reservation and ticket are always required.

#### 17.0 PASS PRIVILEGES FOR DISABLED EMPLOYEES

Employees granted disability retirement by the RRB will retain personal pass privileges. The employee is responsible for providing a copy of the RRB disability retirement award letter to Human Resources.

# 18.0 PASS PRIVILEGES FOR INTERNS

Intern pass riders may book travel or present (flash) their Employee ID Card or Pass Card for free

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personal travel onboard certain Amtrak trains. Travel is subject to the same "Red, White and Blue" fares policy that applies to regular employees.

## 19.0 EMPLOYEES ON LEAVE OF ABSENCE

Employees on a leave of absence retain pass privileges as indicated below.

- 19.1 <u>Furlough</u>. Employees on furlough retain pass privileges for 180 days from the last day worked.
- 19.2 <u>Medical Leave of Absence</u>. Employees on an approved medical leave of absence under the Family and Medical Leave Act (FMLA) retain pass privileges for the entire FMLA leave period. Employees on an approved absence pursuant to a collective bargaining agreement or as an accommodation under the Americans with Disabilities Act (ADA) retain pass privileges for 180 days from the last day worked. Employees on an unapproved leave of absence will have their pass privileges revoked.
- 19.3 <u>Leave of Absence Due to Military Duty</u>. Employees on active military leave retain pass privileges for the entire period of active military duty, regardless of the time in service before the active military duty began.
- 19.4 <u>Leave of Absence to Become Full Time Union Official</u>. Employees on a leave of absence to become a full-time union official retain pass privileges for the entire period of being a full-time union official, regardless of the time in service before the active union official leave began.
- 19.5 <u>Leave of Absence for Any Other Reason</u>. Employees do not retain pass privileges during a leave of absence not covered above.
- 19.6 <u>Suspension for Disciplinary Reasons</u>. Employees do not retain pass privileges during the period of suspension.

#### 20.0 TRAVEL TO FUNERALS

The remains of a deceased Amtrak employee, retiree, spouse/domestic partner, and dependent may be transported by Amtrak Express at no charge, provided the origin station, destination station, all transfer stations, and all trains to be used, are able to handle remains shipments. Spouses, domestic partners and dependents of deceased employees and deceased retirees may travel in coach service and memorial services for the deceased employee or deceased retiree at no charge. *Please contact PassBureau@amtrak.com for details*.

# 21.0 FOREIGN RAILROADS

Amtrak has reciprocal agreements with passenger railroads in other countries which permit reduced fare privileges. A reservation and ticket are required. *Please contact PassBureau@amtrak.com for details*.

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## 22.0 SERVICE AWARD TRIPS

Amtrak employees with at least ten (10) years of service may take one (1) service award trip on their tenth anniversary and every five years thereafter, anywhere on the Amtrak system. Advance reservations are required. For more information, visit the Employee Recognition policy, P/I 7.28, and Employee Pass, Voucher, and Service Award Trip Policies guidelines, on the intranet.

## 23.0 VOUCHERS AND DISCOUNTS

- 23.1 <u>Vouchers</u>. Travel vouchers are permitted for employees who are ineligible for business pass privileges or eligible for pass travel but are without a travel pass card (for example, newly hired employees not currently active in the ticketing system). Non-Amtrak employees (for example, contractors and interns) may also be authorized to receive a travel voucher for business purposes.
- 23.2 <u>Discounts</u>. Pass riders are not allowed to apply additional discounts when utilizing pass privileges.

# 24.0 <u>TAX IMPLICATIONS</u>

- The value of business travel is not taxable income.
- The value of personal travel (and all travel by the employee's spouse or domestic partner, or retiree) at privilege levels beyond those of the personal travel is taxable income. The value will be added to the employee's pay statement under "Non-Cash Income".
- A Companion pass is considered taxable income to the Amtrak employee.
- With regard to the Board of Directors, the value of the travel by the member for Amtrak business, including travel to and from board meetings, is not taxable income. The value of personal (non-Amtrak business) travel by the member, and all travel by the spouse or domestic partner, and dependents, is taxable income and will be reported to the IRS at the end of the year.

## 25.0 LEGAL AGREEMENT

Notwithstanding any provision in this policy, employees who have executed an agreement as part of a legal settlement may retain personal privileges in accordance with that agreement.

# 26.0 POLICY VIOLATIONS

- 26.1 <u>Violations</u>. A violation of this policy may constitute a theft of service and may result in a loss of pass privileges, disciplinary action, or legal prosecution. Violations include the following:
  - Reserving or ticketing pass travel in violation of time limit or other restrictions;
  - Flash passing on trains or services that do not permit flash passing, such as in Business Class or on Acela service;
  - Pricing pass travel at a fare to which the pass holder, spouse, domestic partner or dependent is not entitled;

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- Manipulating the reservation system to obtain space or a fare that is otherwise unavailable;
- Obtaining pass travel for a person who is not entitled to pass travel privileges;
- Failing to report a lost or stolen pass, or tickets obtained with the pass; or
- Using business pass privileges to commute to and from work.
- 26.2 <u>Recovery</u>. Amtrak retains the right to recover the value of the loss suffered as a result of an inappropriately priced ticket.
- 26.3 <u>Suspension of Privileges</u>. The travel privileges of spouses and dependents are automatically suspended when the employee's or retiree's travel privileges are suspended due to a violation of this policy.
- 26.4 <u>Impact on Business Pass Privileges</u>. An employee's business pass privileges will be suspended or terminated upon suspension or termination of the employee's personal pass. Any necessary business travel would require the use of a voucher.

# 27.0 <u>RELATED POLICIES AND PROCEDURES</u>

- Appendix: Pass Privilege Policy Fees
- Employee Code of Ethics and Business Conduct
- Employee Pass, Voucher, and Service Award Trip Policies
- Employee Recognition policy, P/I 7.28
- Form NRPC 3265 Business Pass Privilege Request
- Standards of Excellence

For questions regarding this policy, please call the HRERC (HR Employee Resource Center at (888) 694-7372.

For additional information, please contact:
Amtrak Pass Bureau
1 Massachusetts Avenue, NW
Washington, DC 20001
Email: passbureau@amtrak.com

Phone: (202) 906-3745 | ATS 777-3745 Fax: (202) 906-3192 | ATS 777-3192

NOTE – Appendix: Pass Privilege Policy Fees, see next page.

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# **Appendix: Pass Privilege Policy Fees**

Overview of flat fares and fees associated with pass travel and as cited in the Pass Privilege Policy.

Fare or Fee Type	Amount	Notes
Acela Business Class Flat Fare	\$10	
Acela First Class Accommodation Fee	\$30	Total fare of \$40 (\$10 + \$30) in First Class
Sleeper Accommodation Fee	\$25	
Auto Train Coach Meal Fee	\$25	Valid through 1/14/20 only
Auto Train Vehicle Fee	\$75	Includes cars, vans, SUVs, trucks and motorcycles within the vehicle size requirements

Current as of 9/29/19

[Note – Appendix added 10/29/19.]

[Note – Sec. 16.0 amended to allow Acela travel under certain conditions, 9/24/20.] [Note – Sec. 1.0 amended for title; Sec. 27.0 amended to refer to HR Employee Resource Center, 9/13/22.]

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