OFFICE OF PUPIL TRANSPORTATION

TRANSPORTATION PRACTICES AND PROCEDURES

Office of School Support Services
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OPT Web address: www.opt-osfns.org/opt

Managing Transportation Services using ATS Data

ATS data is used by both schools and OPT to manage transportation services for children. Effective management and use of ATS:

- Provides OPT with information regarding Yellow Bus stops to allow efficient routing of General Education students eligible for Yellow Bus Transportation
- Tracks inventory and distribution of student MetroCards
- Maintains accurate student address and contact information in order to identify eligibility for General Ed students and to efficiently route Special Education students receiving door-to-door service.

These materials have been created for school staff to assist in managing these critical processes in order to provide all eligible students safe, clean, and timely transportation to and from school. This guide focuses on several key ATS functions performed regularly in schools, highlights time-sensitive tasks, and reviews processes necessary during specific times of the school year.

OPT Overview and Key Terms

Understanding key transportation practices and procedures helps build knowledge and skills for school staff in managing transportation services for students. Please review the **OPT Web site** regularly for additional information, updates, and Frequently Asked Questions that are helpful for both schools and parents.

Eligibility

Eligibility is the key term that identifies which type of transportation service a student may receive. Eligibility for all General Education students is based on the student's grade and walking distance from home to school. Eligibility is displayed in ATS for each student once the student's address has been validated.

Full-Fare eligible means the student may receive Full-Fare MetroCard **or** Yellow Bus transportation

Half-Fare eligible means the student will receive a half-fare MetroCard for use on MTA buses: students pay $1 of the required fare

Schools should direct parents to the OPT Web site for information and FAQs regarding eligibility determinations

Yellow Bus Transportation

OPT provides two distinct types of bus transportation for eligible students: General Ed transportation provides stop-to-school service; Special Ed transportation provides door-to-door service. Delivery of each type of bus service relies on key information provided to OPT by school staff using ATS. Specific information regarding Special Ed students may require consultation and communication between schools, ISC/CSE staff, and OPT Account Managers in order to provide a high level of service for each student.

Yellow School Bus Service (Stop-to-School)

Based on eligibility and existing Yellow Bus service at the child's school, students may be assigned to specific Yellow School Bus Stops. A **school bus stop** is a specific intersection where students wait to be picked up each day. Students are dropped off at the same location at the end of the day. A group of stops constitute a **Yellow Bus route**. Routes may serve one or more schools. Schools assign individual students to bus stops in ATS. Stops are created specifically for individual schools. Creating new stops, adjusting existing stops, and deleting stops no longer in use is done by school staff using the **OPT 199 application**. A link to the OPT 199 application is available on the **OPT Web site**.

> Please Note:
> While the majority of students receiving stop-to-school service are General Ed students, Special Ed students may also be assigned Yellow Bus service (or a full-fare MetroCard) based on their travel requirements as outlined in their IEP.

Special Ed Transportation (Door-to-Door)

Special Ed students receive door-to-door service based on their travel requirements as outlined in their IEP. OPT handles the routing for these students. Schools and ISC/CSE staff manage student data (address, contact information, medical alert codes that identify specific requirements) in order for OPT routers to effectively provide the correct type of transportation for each student. Parents of Special Ed students are able to request an alternate address for the afternoon (Change of Afternoon Drop) if needed: OPT will make every attempt to honor these requests. Parents complete a Change of Afternoon Drop form (available on the OPT Web site) and forward the completed form to OPT for review. ATS is used to manage both Special Ed and General Ed transportation. For ATS security and operational requirements, access to some Special Ed screens are limited: schools should contact their Transportation Account Manager at their ISC or ATS Helpdesk regarding access to specific student information and screens in ATS.

MetroCards

MetroCards are distributed to eligible students for travel to and from school. Specific information regarding proper use and FAQs regarding student MetroCards are posted on the **OPT Web site.**

Full-Fare MetroCards provide students with **three trips** each school day and allow for one transfer from one type of transportation to another for each trip (bus-to-bus, train-to-bus, or bus-to-train). **Four-trip** MetroCards are available upon the request of the principal for students that must take three types of transportation to school each day (two buses and one train, three buses, etc).

Half-Fare MetroCards are provided for students that live close to school for use in inclement weather or times when the student decides to ride public transportation rather than walk to school. Half-Fare cards are only valid on MTA buses: the student is required to pay $1.00 of the fare after dipping their MetroCard in the card reader.

School staff is responsible for these key actions:
- Coding all eligible students that require MetroCards in ATS
- Distributing individual cards (and replacement cards) to eligible students using a log
- Recording serial numbers for each card on each student's individual record
- Deactivating lost or stolen cards
- Securing MetroCards while stored at the school

Step-by-step instructions for coding, assigning, and deactivating MetroCards are outlined in section 2

Schools receive and distribute different types of MetroCards (K-6 three- and four-trip, 7-12 three- and four-trip, K-12 Half-Fare, etc.) to eligible students. MetroCard shipments to schools are based solely on ATS data entry. Schools receive shipments of MetroCards from OPT for school opening (late August), start of the new term (mid-January), and for summer programs (late June). OPT announces data entry deadlines in advance to all schools: Managing deadlines to review and adjust student records will improve the accuracy and timeliness of MetroCard deliveries.

MetroCard Inventory and Shipment Best Practices
- All students properly coded (Action Code **T** or **F**) for the type of MetroCard they require
- Review Inventory Stats in ATS on a regular basis
- Keep different types of MetroCards separated to eliminate errors in distribution

Security and Safety Best Practices
- Keep unassigned MetroCards in school safe
- Report thefts immediately to OPT: Police notification and a police report is required if thefts occur
- Schools may not lend cards to other schools: shipments and inventory updates are for specific schools only

Distribution Best Practices
- Maintain a distribution log: Critical tool for auditing
- Have students sign for receipt of MetroCard: Maintain logs for six years
- Distribute cards only to eligible students: Provide correct type of MetroCard for student's eligibility
- Review student eligibility in ATS: review TLST screen for the most current data
- Lost cards replaced as soon as possible: No charge to students for replacement cards

Expiration Date and Serial Number
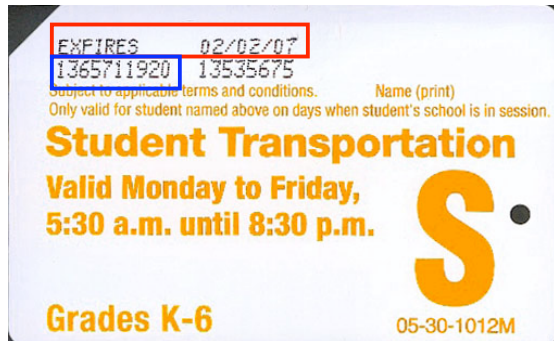
Each Student MetroCard has a ten-digit serial number
- Schools use the ten-digit serial number when assigning individual cards to students

MetroCards are programmed with a specific date they can begin to be used <u>and</u> a specific date they will expire
- OPT will advise schools which date the MetroCards can be used by students at the beginning of the school year, at the beginning of the spring term, and for summer school
    - MetroCards will not work if used before the active date
- Cards are inactive past the expiration date and will not work in subway turnstiles or bus fare boxes

Schools handle expired MetroCards by cutting them in two and discarding them

Code on Invoice	MetroCard Type
	MetroCards for K-6 students are Orange
E1	**K-6** Full Fare Three-Trip
E3	**K-6** Full Fare Four-Trip Four-Trip cards are identified by the line underneath the words "Student Transportation"
E5	**Special Ed K-6** Full Fare
E6	**Special Ed K-6** Full Fare Four-Trip
	MetroCards for 7-12 students are Green
H1	**7-12** Full Fare Three-Trip
H3	**7-12** Full Fare Four-Trip Four-Trip cards are identified by the line underneath the words "Student Transportation"
H5	**Special Ed 7-12** Full Fare
H6	**Special Ed 7-12** Full Fare Four-Trip
H2	**K-12** Half Fare Student pays $1 of fare Half-Fare MetroCards are Green and have Bus Only on the face of the card
	Cards sent to schools but not recorded on Individual Student Records in ATS
X1	Special Program Two-Trip Card – Used for after school and other programs
PS	PSAL Athlete Cards – Sent to schools based on roster entries completed by Athletic Directors

Code on Invoice	MetroCard Type
	Good on Sunday MetroCards are valid Sunday through Friday
P1	**K-6** Full Fare Good on Sunday
P3	**K-6** Full Fare Four-Trip Good on Sunday
P5	**Special Ed K-6** Three-Trip Good on Sunday
S1	**7-12** Full Fare Good on Sunday
S2	**K-12** Half Fare Good on Sunday
S3	**7-12** Full Fare Four-Trip Good on Sunday
S5	**Special Ed 7-12** Three-Trip Good on Sunday
NS	Night High School
NZ	Night High School Half Fare
	Cards available for purchase by schools
PO	**Gold MetroCards** Two Trips Ordered by schools using FAMIS – requires purchase order Cost per card $4.00

Main Transportation Functions in ATS

In general, schools manage student transportation issues using ATS by performing the following basic functions:

General Ed Students:
- Assign eligible students MetroCards for travel to and from school

    OR
- Assign eligible students Yellow Bus Stops for stop-to-school bus service
- Enter Variance codes for students approved to receive transportation services outside of OPT's regular protocols, including NCLB students, specific Gifted and Talented Programs, and students in Temporary Housing.

Special Ed Students:
- Update and manage student data for effective routing of students receiving door-to-door service

    OR
- Assign eligible students MetroCards for travel to and from school

    OR
- Assign eligible students Yellow Bus Stops for stop-to-school bus service

    Please Note:
    School staff should always consult with Transportation Account Managers, SE Transportation Liaisons, and Students in Temporary Housing (STH) content experts located at their ISC to resolve issues and discuss best practices

Key terms in ATS that identify which type of services General Ed students will receive

When reviewing student records, two terms help clarify the type of transportation eligible students will receive: **Eligibility** and **Distance** Code. **Transportation Status** (Trans Stat) codes can be reviewed to help identify individual student records that require updates, corrections, or changes.

Distance Codes

Distance codes are automatically calculated when a student's address is validated through ATS. A student's grade and walking distance from home to school code are used to determine eligibility for transportation:

A – Less than ½ mile
B – ½ mile to 1 mile
C – 1 mile to 1 ½ miles
D – 1 ½ miles or more

Eligibility

An individual student's eligibility, based on grade and distance from school, determines the type of transportation they will receive. ATS automatically displays a student's eligibility:

H - Half Fare: Student receives half-fare MetroCard for travel
F – Full Fare: Student receives **either** full-fare MetroCard **or** Yellow Bus service
S – Special Ed Full Fare: Special Ed student receives **either** full-fare MetroCard **or** Yellow Bus service

> **Remember that eligibility is based on both grade <u>and</u> distance: Students will change eligibility as they advance in grade even though their home address remains the same.**

Transportation Status

Transportation Status (**Tran Stat**) Codes located on the right side of the **TLST** screen identify which type of transportation has been assigned to the student. The **Tran Stat** will change when entering an Action Code for MetroCard on the **TLST** screen **or** updating a student's record with a MetroCard serial number **or** Yellow School Bus Stop number

These codes will appear after schools enter Action Code **T** or **F** on the **TLST** screen:
AT: Eligible student coded to receive three-trip MetroCard
AF: Eligible student coded to receive four-trip MetroCard

This code will appear after schools enter the **MetroCard serial number** on the student's individual record:
AP: MetroCard number entered and saved on student record

This code will appear after schools enter a **Yellow Bus Stop number** on the student's individual record:
AB: Yellow School Bus Stop number entered and saved on student record

Students records with this code should be **reviewed immediately** and action taken to correct an error:
SB: Suspended Yellow School Bus Stop: the stop number entered is invalid **or** the student has moved **or** the student is not eligible for Yellow School Bus service.

Variances

Variances address exceptions to standard OPT practices and procedures. Parents can request variances through OPT for the following issues:

Medical
Student requires exception due to medical issue. Reviewed by DOE Medical for approval
Hazard
Student requires exception due to hazardous condition on walking route to school
Access
Student requires exception due to lack or infrequency of public transportation service
Emergency
Student requires exception due to emergency situation

Parents and schools can download Variance request forms from the **OPT Web site**. Instructions for completion and submission are included with the documents. If approved, schools will receive a letter with a **variance number** for entry on the student's individual record.

Other Variances:

Additional variance numbers are used for students in temporary housing, shelters, NCLB students, and a range of other issues. Schools will be instructed on which variances may be used for students through their ISC or OPT staff. Available variance numbers can be viewed by using the **F4/Lookup** function on a student's transportation data update screen.

Managing Yellow Bus Stops
Schools manage Yellow School Bus stops using the **OPT 199** application on the **OPT Web site**. Schools can add, adjust, or delete stops for their students. When logging in to add a new bus stop, schools can select from a range of intersections available for their school's location. If the stop meets all criteria schools will receive instant notification and the stop will be routed in 5-7 business days. Once routed and posted on the list of the school's approved stops (this report is available on the OPT 199 application), schools can notify parents and children to begin using the new stop. Stop numbers are four digits and are entered in the Yellow Bus Stop Number field on the student's transportation data update screen in ATS. User guides for the OPT 199 application are available upon login and can be downloaded and printed for reference.

> **Please Note:**
> Students eligible for full-fare transportation receive either a MetroCard **or** Yellow Bus service: students waiting for a new stop to be approved may either be assigned to an existing stop or provided a MetroCard until the new stop is activated.

Stop requests may be rejected for one of the following reasons:
Stop exists
> Resolution: Assign the student to the existing stop

Stop less than ¼ mile from existing stop
> Stops must be a minimum of ¼ mile apart
> Resolution options include having the student use an existing stop, requesting another new stop using a different intersection, or adjusting an existing stop

Adding stop makes existing route exceed 5 miles
> OPT generally keeps bus routes less than five miles in length
> Contact OPT to discuss this issue – If the student is in NCLB or specific Gifted or Talented Program the five-mile rule may be waived and the stop created
> Schools can also review existing stops and delete unused stops in order to keep the route less than five miles

Managing Stops using the **OPT 199** application is an important tool for schools to use in order to make sure buses are utilized as effectively as possible. School staff should periodically review the list of approved stops and delete unused stops.

ATS Sign On and Navigation to Transportation Main Menu

```
12/17/07            A T S  S I G N O N  S C R E E N          F1CD1085
09:41:01                                                      SOMF
            *           *****************************      *************
          ***     *****         ******       *****    ****       ****
        *****      ***          ******        ***   *****         ****
       *******      *           ******          *  ******            *
      *********                 ******             *******
      **   ******               ******             **********
     **     ******              ******             ************
    **       ******             ******              **************
   **         ******            ******               ***********
  *********************         ******                   *******
    **          ******          ******                    ******
   **           ******          ******                    *****
  **            *******         ******        **          *****
 ***            *********      ********       ****         ****
*****         ************   ************       *************

Enter your ATS USERID and PASSWORD and press RED ENTER for ATS;
Press F10 for ATS Display, ATS Reports, ATS/SBMS, and WETU, or F3 to exit.
(your PASSWORD will not appear when you type it)

USERID   ===> _
PASSWORD ===>

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```

At the Sign On screen:
Enter your ATS userid and password
> Press **Right Ctrl**

```
PROFILE 11-X-068        New York City Public Schools     12-17-07 09:45:29
INFO0100               Automate The Schools Security Screen   01464-EJACOBS2
==> _


        **************************************************************

           INFORMATION CONTAINED IN THIS SYSTEM CONSTITUTES EDUCATION
        RECORDS WITHIN THE MEANING OF THE FAMILY EDUCATION RIGHTS AND
        PRIVACY ACT OF 1974, AS WELL AS BOARD OF EDUCATION POLICY AND
        REGULATIONS. AS SUCH, UNAUTHORIZED ACCESS TO AND/OR RELEASE OF
        ANY DATA IDENTIFIABLE BY EITHER STUDENT NAME OR STUDENT
        IDENTIFICATION NUMBER, IS SUBJECT TO THE PROVISIONS OF THE
        FEDERAL LAW AND REGULATIONS. IN ADDITION, BOARD OF EDUCATION
        POLICY AND CHANCELLOR'S REGULATION A-820, ON COLLECTION,
        MAINTENANCE, AND DISSEMINATION OF STUDENT RECORDS MUST BE
        OBSERVED.


        **************************************************************




                PRESS RIGHT CTRL/RED ENTER KEY TO CONTINUE

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```

At the Security screen:
Review Security Guidelines
> Press **Right Ctrl**

```
PROFILE 11-X-068       New York City Public Schools        12-17-07 09:46:21
INIT0100               Automate The Schools Primary Menu       01464-EJACOBS2
==> _           Command Line


   1  NEWS  The Latest News             2  SVCS  Supplemental Services

   3  BIOG  Biographical Information     4  HIST  History

   5  ATTD  Attendance                  6  REPT  ATS Reports

   7  MNTN  Maintenance                 8  SBMS  School Based Management

   9  PLAC  Middle School Placement    10  MSPA  Middle School SPA

  11  ESPA  Elementary School SPA      12  PATD  Period Attendance



  Place cursor next to selection desired and press RIGHT CTRL/RED ENTER
  F1/Help    F2/       F3/           F4/Lookup     F5/Print news  F6/
  F7/        F8/       F9/Refresh    F10/          F11/           F12/Exit


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```

From the Primary menu:
Select **Supplemental Services (SVCS)** by entering **2** or **SVCS** at the Command Line
     Press **Right Ctrl**

```
PROFILE 11-X-068       New York City Public Schools        12-17-07 09:47:27
INIT0200               Supplemental Services Menu              01464-EJACOBS2
==> _


   1  TRNS  Pupil Transportation       2  OPTT  OPT - Transportation
   3  DODA  Downloading Data           4  HLTH  Health and Immunization
   5  SUMM  Summer School Functions    6  SEIS  Special Ed Integration Surv
   7  DFLU  Free Lunch Update          8  CTWD  Citywide Pgm. Maint. Menu
   9  SNAM  School Name Search        10  CIMS  Compreh. Inst. Management
  11  FOOD  Food Ordering System      12  ZONE  Zoned School Lookup
  13  UMON  UAPC Transactions Monitor 14  FLDT  Field Trip Menu
  15  HRAL  HRA to ATS Student ID Link 16 TUTO  NCLB SES Tutoring
  17  STHM  Students in Temp. Housing  18 OTCS  OTC School Referral Action
  19  PREP  Prep Academy Functions    20  EXPD  Extended Time Sessions
  21  TGDE  Delete Appeals Students   22  ODPL  High School Diploma Orderin
  23  DCLC  Data Cleaning Collection  24  SFLU  Free Lunch Code Update
  25  GTRT  Gifted and Talented Update

  Place cursor next to selection desired and press RIGHT CTRL/RED ENTER
  F1/Help    F2/       F3/Quit-return F4/Lookup     F5/           F6/
  F7/        F8/       F9/Refresh     F10/          F11/          F12/Exit


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```

From the Supplemental Services Menu:
Select **Pupil Transportation (TRNS)** by entering **1** or **TRNS** at the Command Line
     Press **Right Ctrl**

```
PROFILE              New York City Public Schools      12-17-07 09:48:36
TRAN0101             Fall Transportation Statistics        01464-EJACOBS2
==> _
---------------- METROCARD AND YELLOW BUS - STOP TO SCHOOL ----------------
AVAILABLE     (A): 29    METRO CARD TRANSPORTATION RECORDS  (ALL TYPES)
ASSIGNED      (A): 48    METRO CARD TRANSPORTATION RECORDS  (ALL TYPES)
DEACTIVATED   (D): 8     METRO CARD TRANSPORTATION RECORDS  (ALL TYPES)
ACTIVE        (A): 137   YELLOW BUS TRANSPORTATION RECORDS
SUSPENDED     (S): 2     YELLOW BUS - EITHER UPDATE OR DELETE THESE RECORDS
LAST TRANSMISSION: 12/14/07   15:57:56



------------------- SPECIAL EDUCATION - DOOR TO DOOR --------------------
ACTIVE        (A): 81    ACTIVE TRANSPORTATION RECORDS
REQUESTED     (R): 0     REQUEST ENTERED - WAITING TO BE TRANSMITTED TO OPT
TRANSMITTED   (T): 0     TRANSMITTED TO OPT - WAITING FOR RESPONSE FROM OPT
PENDING       (P): 0     REQUESTED AND APPROVED - START DATE AFTER TODAY
LAST TRANSMISSION: 12/14/07   16:07:24
SVER: C(CONT)=0, D(DELETE)=0, G(TO BUS)=0, Y(CONF CHG)=0, UNPROC=81


Press RIGHT CTRL/RED ENTER to continue
F1/Help    F2/         F3/Quit-return F4/          F5/          F6/
F7/        F8/         F9/            F10/         F11/         F12/Exit


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```

The **Transportation Statistics** screen will appear when you first log in and select **TRNS (Pupil Transportation).** This screen summarizes the school's transportation data and provides a "snapshot" of key data for review and follow-up.

MetroCards		
AVAILABLE	(A)	Number of MetroCards (of all types) remaining from the amount shipped to school
ASSIGNED	(A)	Number of MetroCards underlined assigned to individual student records
DEACTIVATED	(D)	Number of MetroCards deactivated on individual student records
Yellow Bus: Stop-to-School		
ACTIVE	(A)	Number of students with assigned Yellow Bus Stops
SUSPENDED	(S)	Number of Students with updated information in their biographical file or with an invalid Yellow Bus Stop in their record. Review and correct this information as needed
LAST TRANSMISSION		Most recent Date and Time ATS data transmitted to OPT
Contact your ISC Special Ed Liaison for information and assistance in updating **Special Education** students' records		

Press **Right Ctrl** to continue

Note: You can review the school's statistics for transportation at any time by pressing **F5/Stats** on the **Transportation Main Menu** screen.

From the Transportation Main Menu:
Press **F11/Inventory** to view MetroCard inventory figures for each type of MetroCard

```
PROFILE              New York City Public Schools        12-17-07 09:51:08
TRAN0100                 Transportation Main Menu           01464-EJACOBS2
==>  _
             --- METROCARD AND YELLOW BUS - STOP TO SCHOOL ---
         1  TTRE    Eligibility - By Individual Student
         2  TLST    Eligibility - By School, Grade or Official Class
         3  TTTH    Transaction History
         4  TBRM    Run Number / Bus Stop Maintenance
         5  TDMC    Deactivate Unassigned Metro Card

               --- SPECIAL EDUCATION - DOOR  TO  DOOR ---
         6  STRE    Eligibility - By Individual Student
         7  SLST    Eligibility - By School, Grade or Official Class
         8  STTH    Transaction History
         9  SPLA    List of Biographical Changes
        10  SVER    End of Year Verification (OPT Reconciliation)

                      --- PROJECT READ  ---
        11 PLST     Eligibility - By School, Grade or Official Class
For Transportation reports, enter RTRN on Command Line
Place cursor next to selection desired and press RIGHT CTRL/RED ENTER
F1/Help      F2/         F3/Quit-return F4/          F5/Stats      F6/
F7/          F8/         F9/Refresh     F10/          F11/Inventory F12/Exit


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```

```
PROFILE              New York City Public Schools        12-17-07 09:53:52
TRAN0102                Metrocard Inventory Statistics      01464-EJACOBS2
==>  _
                    FALL METROCARD CARD INVENTORY

   PASS TYPE                        SHIPPED  ASSIGNED  DEACTIVATE ASSIGNED
                                   METROCARD METROCARD METROCARD 55555555

ELEM - FULL FARE                       30       13         2        4
ELEM - FULL FARE FOUR TRIP              0        0         0        0
ELEM - FULL FARE SPECIAL ED.            4        4         0        1
ELEM - FULL FARE SPECIAL ED. FOUR TR    0        0         0        0
HIGH - FULL FARE                        0        0         0        0
HIGH - FULL FARE FOUR TRIP              0        0         0        0
HIGH - FULL FARE SPECIAL ED.            0        0         0        0
HIGH - FULL FARE SPECIAL ED. FOUR TR    0        0         0        0
HIGH - FULL FARE S1                     0        0         0        0
HIGH - HALF FARE (K - 12)              34       14         6       12
HIGH - HALF FARE FOUR TRIP (K - 12)     0        0         0        0
HIGH - HALF FARE S2                     0        0         0        0
Press RIGHT CTRL/RED ENTER to continue
F1/Help      F2/         F3/Quit-return F4/          F5/           F6/
F7/          F8/         F9/            F10/         F11/          F12/Exit


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```

Always review the MetroCard shipment receipt to verify the number and type of MetroCards delivered. Contact OPT to resolve discrepancies, for assistance, or additional information.
   Press **Right Ctrl** to continue

Accessing and Updating Transportation Data Update Screens for Individual Students

Note: We have blocked student information on examples of ATS screen shots to ensure privacy

```
PROFILE              New York City Public Schools      12-17-07 09:51:08
TRAN0100               Transportation Main Menu          01464-EJACOBS2
==> _
           --- METROCARD AND YELLOW BUS - STOP TO SCHOOL ---
        1  TTRE    Eligibility - By Individual Student
        2  TLST    Eligibility - By School, Grade or Official Class
        3  TTTH    Transaction History
        4  TBRM    Run Number / Bus Stop Maintenance
        5  TDMC    Deactivate Unassigned Metro Card

              --- SPECIAL EDUCATION - DOOR  TO  DOOR ---
        6  STRE    Eligibility - By Individual Student
        7  SLST    Eligibility - By School, Grade or Official Class
        8  STTH    Transaction History
        9  SPLA    List of Biographical Changes
       10  SVER    End of Year Verification (OPT Reconciliation)

                    --- PROJECT READ  ---
       11 PLST    Eligibility - By School, Grade or Official Class
For Transportation reports, enter RTRN on Command Line
Place cursor next to selection desired and press RIGHT CTRL/RED ENTER
F1/Help    F2/        F3/Quit-return F4/        F5/Stats      F6/
F7/        F8/        F9/Refresh    F10/        F11/Inventory F12/Exit


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```

From the **Transportation Main Menu** select one of two methods to view and update student records on the Transportation Data Update screen

TLST—Eligibility – By School, Grade or Official Class to view entire school, class, or Transportation Status

TTRE—Eligibility – By Individual Student to search for students individually by Student ID

> Note: At this screen press **F5/Stats** or **F11/Inventory** to review MetroCard and Yellow Bus statistics and inventory figures. Also at this screen, enter **RTRN** to view **Transportation Reports**.

Update Student Record using **TLST—Eligibility – By School, Grade, or Official Class**

```
PROFILE 11-X-068      New York City Public Schools      12-18-07 10:07:15
TRAN0100                Transportation Main Menu          00756-EJACOBS2
==> _
              --- METROCARD AND YELLOW BUS - STOP TO SCHOOL ---
         1  TTRE    Eligibility - By Individual Student
         2  TLST    Eligibility - By School, Grade or Official Class
         3  TTTH    Transaction History
         4  TBRM    Run Number / Bus Stop Maintenance
         5  TDMC    Deactivate Unassigned Metro Card

              --- SPECIAL EDUCATION - DOOR  TO  DOOR ---
         6  STRE    Eligibility - By Individual Student
         7  SLST    Eligibility - By School, Grade or Official Class
         8  STTH    Transaction History
         9  SPLA    List of Biographical Changes
        10  SVER    End of Year Verification (OPT Reconciliation)

                      --- PROJECT READ  ---
        11  PLST    Eligibility - By School, Grade or Official Class
 For Transportation reports, enter RTRN on Command Line
 Place cursor next to selection desired and press RIGHT CTRL/RED ENTER
 F1/Help    F2/         F3/Quit-return F4/         F5/Stats     F6/
 F7/        F8/         F9/Refresh    F10/         F11/Inventory F12/Exit

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```

Select **TLST—Eligibility – By School, Grade, or Official Class** from the <u>**Transportation Main Menu**</u>

Press **Right Ctrl**

```
PROFILE 11-X-068       New York City Public Schools       12-26-07 08:53:24
TRAN0110          Select Students By Grade Or Official Class   01961-EJACOBS2
==>
DIST: 11 BORO: X SCHOOL: 068   GRADE: ___   OFFICIAL CLASS: ___   TRAN STAT: _

ACT                                          DST ADR GRD      OFF  TRAN
CDE        NAME            STUDENT ID  SEX  DOB  CDE FLG CDE ELIG CLS  STAT
---------------------------------------------------------------------------












 Enter GRADE, OFF CL or leave blank for entire school and press RIGHT CTRL/RED
 F1/Help    F2/         F3/Quit-return F4/Lookup    F5/        F6/
 F7/        F8/         F9/Refresh    F10/          F11/       F12/Exit

MA    a                                                         04/040
```

<u>To see all students</u>: Press **Right Ctrl**

<u>To view a specific Grade or Class</u>: move cursor to field, enter grade or class then press **Right Ctrl**

For this step we left fields blank to view <u>all</u> students

```
PROFILE 11-X-068       New York City Public Schools        12-26-07 09:32:59
TRANO110          Select Students By Grade Or Official Class   01966-EJACOBS2
==>                                                          PAGE 1 OF 82
DIST: 11 BORO: X SCHOOL: 068   GRADE:      OFFICIAL CLASS:      TRAN STAT:

ACT                                             DST ADR GRD       OFF  TRAN
CDE      NAME            STUDENT ID  SEX   DOB   CDE FLG CDE ELIG CLS  STAT
----------------------------------------------------------------------------
  _                                 F  08/18/98  B   X   140  H   402  AT
                                    F  02/18/98  A   V   140      401
                                    M  09/21/96  A   V   953  S   459
                                    F  06/08/95  A   V   150      504
                                    F  06/08/95  A   V   150      502
                                    M  06/09/99  A   V   120  H   203
                                    M  08/06/98  A   X   140      402
                                    F  06/27/97  A   V   140      405
                                    M  11/12/97  C   V   140  F   403  AP
                                    M  12/05/01  A   V   110  H   103
ACT CDE: METROCARD REQUEST: T = 3 TRIP   F = 4 TRIP
    CURRENT BUS / METROCARD: U = UPDATE  D = DISPLAY   X = DELETE   H = HISTORY
Enter ACT CODE next to desired student and press RIGHT CTRL/RED ENTER
F1/Help    F2/         F3/Quit-return F4/Lookup      F5/          F6/
F7/        F8/Forw     F9/Refresh     F10/           F11/         F12/Exit

MA    a                                                          09/003
```

Use **F8/Forw** to page through the student listing (use **F7/Back** to page back through the list)

There are ***two actions*** *available from this screen:*

1. Enter Action Code **T** or **F** to identify students that need three- or four-trip MetroCards

Enter Action Code, press **Right Ctrl**

The **Tran Stat** will change to **AT** or **AF**: the student is now coded to receive a MetroCard

Code all students with **H** eligibility with a **T** in order to have Half Fare MetroCards sent to your school for distribution

Code all students with **F** eligibility that will not receive Yellow Bus service with a **T** or **F** in order to have the proper Full Fare MetroCard sent to your school for distribution

It is important to have all eligible students coded for MetroCards in order to ensure your school receives the proper number and type of MetroCards shipped from OPT

2. Enter Action Code **U** to update an individual student record

Enter **U**, press **Right Ctrl**

The student's individual record will display:

```
PROFILE 11-X-068        New York City Public Schools       12-18-07 10:29:56
TRAN0120                 Transportation Data Update            00756-EJACOBS2
==>
STUDENT ID: XXXXXXXXX  LAST NAME: XXXXXXX   FIRST NAME: XXXXXX  MI: D
ATS SCHOOL  11X068        GRADE CODE: 140        OFF CLASS: 404
OPT SCHOOL: 11068         OPT GRADE: 04              DOB: 05/23/98 SEX: M

HOUSE NO: XXXX    STREET:  EAST 224 STREET               APT NO: PH
CITY: BRONX                            STATE: NY    ZIP: 10466
BORO: X                                STREET NAME CODE: 28350 01010

DISTANCE FROM     CALCULATED: C   (1 MILE OR MORE, BUT LESS THAN 1 1/2 MILES)
HOME TO SCHOOL

SPECIAL ED:            REQUEST 4-TRIP: N       VARIANCE NUMBER: _____

METROCARD NUMBER: _____         YELLOW BUS STOP NO:
  METROCARD TYPE: _

Make changes to this data as required
F1/Help    F2/Save     F3/Quit-return F4/Lookup      F5/Delete      F6/
F7/        F8/         F9/Refresh     F10/           F11/           F12/Exit

MA    a                           ⇑                          17/020
```

Use the **Tab** key to enter data in the field required

MetroCard Number: Enter MetroCard serial number (10-digits) that has been assigned to the student: Hit **F2/Save** <u>twice</u> to save

Yellow Bus Stop Number: With the cursor in the field, pressing **F4/Lookup** will display the bus stops available for assignment to the student: Select the stop number and enter it in the field: Press **F2/Save** <u>twice</u> to save

Variance Number: Place the cursor in the field and press **F4/Lookup** to view available variances

> **Variances approved through OPT** for Medical, Access, Hazard, and Emergency requests will be assigned a specific variance number and sent to schools by OPT: enter the variance (One letter and a four digit number without spaces or hyphens– ex: *H2507*)
>
> **Variances for other issues**—Temporary Housing, House number or Address issues— will appear using the lookup function. Enter the variance number the same as above

> When entering Variances: The MetroCard number assigned or the Yellow Bus Stop number must be added <u>at the same time</u> as the variance number before pressing **F2/Save** twice to save the information. (Please see section 1 for more complete information regarding Variances and Yellow Bus Stop Information)

Trans Stat will change after data has been entered and saved on an individual student record:

> <u>Assigned MetroCard number</u>: The **TLST** screen will display **AP** for the student's **Tran Stat**
>
> <u>Assigned Yellow Bus Stop number</u>: The **TLST** screen will display **AB** for the students **Tran Stat**

Update Student Record using **TTRE—Eligibility – By Individual Student**

```
PROFILE 11-X-068        New York City Public Schools        12-18-07 10:07:15
TRAN0100                 Transportation Main Menu             00756-EJACOBS2
==> _
                 --- METROCARD AND YELLOW BUS - STOP TO SCHOOL ---
            1  TTRE     Eligibility - By Individual Student
            2  TLST     Eligibility - By School, Grade or Official Class
            3  TTTH     Transaction History
            4  TBRM     Run Number / Bus Stop Maintenance
            5  TDMC     Deactivate Unassigned Metro Card

                 --- SPECIAL EDUCATION - DOOR  TO  DOOR ---
            6  STRE     Eligibility - By Individual Student
            7  SLST     Eligibility - By School, Grade or Official Class
            8  STTH     Transaction History
            9  SPLA     List of Biographical Changes
            10 SVER     End of Year Verification (OPT Reconciliation)

                        --- PROJECT READ  ---
            11 PLST     Eligibility - By School, Grade or Official Class
For Transportation reports, enter RTRN on Command Line
Place cursor next to selection desired and press RIGHT CTRL/RED ENTER
F1/Help    F2/          F3/Quit-return F4/           F5/Stats     F6/
F7/        F8/          F9/Refresh     F10/              F11/Inventory F12/Exit

MA    a                          ⇑                              03/006
```

Select **TTRE—Eligibility – By Individual Student** from the **Transportation Main Menu**
　　Press **Right Ctrl** to continue

```
PROFILE 11-X-068        New York City Public Schools        12-18-07 10:12:31
TRAN0101                 Transportation Eligibility Menu      00756-EJACOBS2
==>

STUDENT ID:   XXX XXX XXX
  LAST NAME: _____ FIRST: _____ BIRTH DTE: __ __ __ SEX: _



            1  TUTD      Update Transportation Data

            2  TDTD      Display Transportation Data

            3  TPAR      Registration For Transportation Service
```

This screen requires two actions: Identify the student **and** choose an option
from the menu
Complete both in order to view the student's information

```
F1/Help    F2/          F3/Quit-return F4/Lookup     F5/          F6/
F7/        F8/          F9/Refresh     F10/          F11/         F12/Exit

MA    a                          ⇑                              06/014
```

Enter "1" or **TUTD** to Update—**then**
Enter Student ID **OR** Name, DOB, Sex
　　Press **Right Ctrl** to continue

Individual Student's **Transportation Data Update** screen will be displayed

```
PROFILE 11-X-068      New York City Public Schools      12-18-07 10:29:56
TRANO120                Transportation Data Update          00756-EJACOBS2
==>
STUDENT ID: XXXXXXXXX  LAST NAME: XXXXXXX  FIRST NAME: XXXXXX  MI: D
ATS SCHOOL  11X068       GRADE CODE: 140       OFF CLASS: 404
OPT SCHOOL: 11068        OPT GRADE: 04              DOB: 05/23/98 SEX: M

HOUSE NO: XXXX   STREET:  EAST 224 STREET              APT NO: PH
CITY: BRONX                              STATE: NY    ZIP: 10466
BORO: X                                 STREET NAME CODE: 28350 01010

DISTANCE FROM     CALCULATED: C   (1 MILE OR MORE, BUT LESS THAN 1 1/2 MILES)
HOME TO SCHOOL

SPECIAL ED:            REQUEST 4-TRIP: N       VARIANCE NUMBER:

METROCARD NUMBER: _____         YELLOW BUS STOP NO:
  METROCARD TYPE: _



Make changes to this data as required
F1/Help     F2/Save      F3/Quit-return  F4/Lookup      F5/Delete     F6/
F7/         F8/          F9/Refresh      F10/           F11/          F12/Exit

MA    a                          ⇑                              17/020
```

Use the **Tab** key to enter data in the field required
MetroCard Number: Enter MetroCard serial number (10-digits) that has been assigned to the student: Hit **F2/Save** <u>twice</u> to save
Yellow Bus Stop Number: With the cursor in the field, pressing **F4/Lookup** will display the bus stops available for assignment to the student: Select the stop number and enter it in the field: Press **F2/Save** <u>twice</u> to save
Variance Number: Place the cursor in the field and press **F4/Lookup** to view available variances

> **Variances approved through OPT** for Medical, Access, Hazard, and Emergency requests will be assigned a specific variance number and sent to schools by OPT: enter the variance (One letter and a four digit number without spaces or hyphens–ex: *H2507*)
> **Variances for other issues**—Temporary Housing, House number or Address issues—will appear using the lookup function. Enter the variance number the same as above

> When entering Variances: The MetroCard number assigned or the Yellow Bus Stop number must be added <u>at the same time</u> as the variance number before pressing **F2/Save** twice to save the information. (Please see section 1 for more complete information regarding Variances and Yellow Bus Stop Information)

> **Trans Stat** will change after data has been entered and saved on an individual student record:
> <u>Assigned MetroCard number</u>: The **TLST** screen will display **AP** for the student's **Tran Stat**
> <u>Assigned Yellow Bus Stop number</u>: The **TLST** screen will display **AB** for the students **Tran Stat**

Deactivate a MetroCard

Lost or stolen MetroCards must be deactivated in order to inform the MTA to invalidate the card so it cannot be used for transportation. Students should receive a replacement card as soon as possible. When deactivating MetroCards, schools must provide the reason for deactivation by using the appropriate deactivation code. When a student reports a Metrocard missing, take the following action to properly deactivate the old card and assign a new card. Based on available inventory of MetroCards at the school, use one of the following procedures if a student reports a lost or stolen MetroCard and needs a replacement:

Replacement Card is available to be distributed immediately: follow these steps if an available card is in inventory and can be assigned to the student

Bring Up Transportation Data Update screen from TLST screen


```
PROFILE 11-X-068        New York City Public Schools        01-11-08 14:02:14
TRAN0110           Select Students By Grade Or Official Class    01558-EJACOBS2
==>                                                      PAGE 2 OF 83
DIST: 11 BORO: X SCHOOL: 068   GRADE:     OFFICIAL CLASS:     TRAN STAT:


ACT                                          DST ADR GRD        OFF  TRAN
CDE       NAME              STUDENT ID  SEX   DOB   CDE FLG CDE ELIG CLS  STAT
----------------------------------------------------------------------
                                      F  03/16/02  A  V  310  H   013
                                      F  12/19/99  D  V  130  F   303
                                      F  12/19/99  D  V  130  F   302
                                      F  12/29/99  C  V  130  F   307  AP
    u                                 F  10/11/01  A  V  110  H   101
    _                                 F  06/23/00  A  V  120  H   208
                                      F  11/01/97  D  V  150  F   503
                                      F  10/23/03  A  V  350      001
                                      F  05/20/00  A  V  120  H   202
                                      M  12/05/96  D  V  951  S   169
ACT CDE: METROCARD REQUEST: T = 3 TRIP  F = 4 TRIP
   CURRENT BUS / METROCARD: U = UPDATE  D = DISPLAY  X = DELETE  H = HISTORY
Enter ACT CODE next to desired student and press RIGHT CTRL/RED ENTER
F1/Help    F2/        F3/Quit-return F4/Lookup     F5/          F6/
F7/Back    F8/Forw    F9/Refresh     F10/          F11/         F12/Exit


MA    a                                                        13/003
```

Enter **U** in **ACT CDE** to update record
   Press Right Ctrl to continue

Student's Transportation Data Update screen is displayed

```
PROFILE 11-X-068      New York City Public Schools          01-11-08 14:04:23
TRAN0120                  Transportation Data Update              01558-EJACOBS2
==>
STUDENT ID: [        ]   LAST NAME: [      ]     FIRST NAME: [        ]  MI: H
ATS SCHOOL  11X068       GRADE CODE: 130         OFF CLASS: 307
OPT SCHOOL: 11068        OPT GRADE: 03                        DOB: 12/29/99 SEX: F

HOUSE NO: 4527     STREET:  HILL AVENUE                       APT NO: 2
CITY: BRONX                                     STATE: NY   ZIP: 10466
BORO: X                                        STREET NAME CODE: 39820 01010

DISTANCE FROM      CALCULATED: C   (1 MILE OR MORE, BUT LESS THAN 1 1/2 MILES)
HOME TO SCHOOL

SPECIAL ED:             REQUEST 4-TRIP: N       VARIANCE NUMBER: _____

METROCARD NUMBER: 1528039488   Old Number    YELLOW BUS STOP NO: ____
   METROCARD TYPE: FULL FARE


Make changes to this data as required
F1/Help    F2/Save     F3/Quit-return F4/Lookup      F5/Deactivate  F6/
F7/        F8/         F9/Refresh     F10/           F11/           F12/Exit


MA    a                          ⇑                             17/020
```

Tab to MetroCard number field

Type the new number over the old number

```
PROFILE 11-X-068      New York City Public Schools          01-11-08 14:04:23
TRAN0120                  Transportation Data Update              01558-EJACOBS2
==>
STUDENT ID: 208 094 359   LAST NAME: ALLEN      FIRST NAME: HALLIZE   MI: H
ATS SCHOOL  11X068       GRADE CODE: 130         OFF CLASS: 307
OPT SCHOOL: 11068        OPT GRADE: 03                        DOB: 12/29/99 SEX: F

HOUSE NO: 4527     STREET:  HILL AVENUE                       APT NO: 2
CITY: BRONX                                     STATE: NY   ZIP: 10466
BORO: X                                        STREET NAME CODE: 39820 01010

DISTANCE FROM      CALCULATED: C   (1 MILE OR MORE, BUT LESS THAN 1 1/2 MILES)
HOME TO SCHOOL

SPECIAL ED:             REQUEST 4-TRIP: N       VARIANCE NUMBER: _____

                       1624359864
METROCARD NUMBER: _____             YELLOW BUS STOP NO: ____
   METROCARD TYPE: FULL FARE    New Number


Make changes to this data as required
F1/Help    F2/Save     F3/Quit-return F4/Lookup      F5/Deactivate  F6/
F7/        F8/         F9/Refresh     F10/           F11/           F12/Exit


MA    a                          ⇑                             17/020
```

Press **F2 twice**
The old MetroCard number will be deactivated
The new MetroCard number is saved on the student's record

<u>Replacement Card is not available to be distributed immediately:</u> follow these steps if there will be a delay in assigning a new MetroCard to the student.

Bring Up Transportation Data Update screen from TLST screen

```
PROFILE 11-X-068      New York City Public Schools       01-11-08 14:02:14
TRANO110           Select Students By Grade Or Official Class   01558-EJACOBS2
==>                                                            PAGE 2 OF 83
DIST: 11 BORO: X SCHOOL: 068   GRADE:     OFFICIAL CLASS:     TRAN STAT:

ACT                                         DST ADR GRD       OFF  TRAN
CDE      NAME           STUDENT ID  SEX  DOB  CDE FLG CDE ELIG CLS  STAT
------------------------------------------------------------------------
                               F  03/16/02  A  V  310  H   013
                               F  12/19/99  D  V  130  F   303
                               F  12/19/99  D  V  130  F   302
 u                             F  12/29/99  C  V  130  F   307   AP
 _                             F  10/11/01  A  V  110  H   101
                               F  06/23/00  A  V  120  H   208
                               F  11/01/97  D  V  150  F   503
                               F  10/23/03  A  V  350      001
                               F  05/20/00  A  V  120  H   202
                               M  12/05/96  D  V  951  S   169
ACT CDE: METROCARD REQUEST: T = 3 TRIP  F = 4 TRIP
   CURRENT BUS / METROCARD: U = UPDATE  D = DISPLAY  X = DELETE  H = HISTORY
Enter ACT CODE next to desired student and press RIGHT CTRL/RED ENTER
F1/Help     F2/        F3/Quit-return F4/Lookup      F5/         F6/
F7/Back     F8/Forw    F9/Refresh     F10/           F11/        F12/Exit


MA    a                                                         13/003
```

Enter **U** in **<u>ACT CDE</u>** to update record
      Press Right Ctrl to continue

Student's Transportation Data Update screen is displayed

```
PROFILE 11-X-068      New York City Public Schools       01-11-08 14:04:23
TRANO120             Transportation Data Update          01558-EJACOBS2
==>
STUDENT ID:              LAST NAME:          FIRST NAME:          MI: H
ATS SCHOOL  11X068       GRADE CODE: 130        OFF CLASS: 307
OPT SCHOOL: 11068        OPT GRADE: 03             DOB: 12/29/99 SEX: F

HOUSE NO: 4527     STREET:  HILL AVENUE              APT NO: 2
CITY: BRONX                           STATE: NY    ZIP: 10466
BORO: X                               STREET NAME CODE: 39820 01010

DISTANCE FROM     CALCULATED: C   (1 MILE OR MORE, BUT LESS THAN 1 1/2 MILES)
HOME TO SCHOOL

SPECIAL ED:          REQUEST 4-TRIP: N     VARIANCE NUMBER: _____

METROCARD NUMBER: 1528039488          YELLOW BUS STOP NO: ____
  METROCARD TYPE: FULL FARE



Make changes to this data as required
F1/Help     F2/Save     F3/Quit-return F4/Lookup    F5/Deactivate F6/
F7/         F8/         F9/Refresh     F10/          F11/        F12/Exit


MA    a                         ⇑                              17/020
```

Tab to MetroCard number field
      Press **F5/Deactivate**

```
PROFILE 11-X-068        New York City Public Schools        01-11-08 14:27:51
TRAN0120                Transportation Data Update            01239-EJACOBS2
==>
STUDENT ID: ▢            LAST NAME: ▢          FIRST NAME: ▢          I: H
ATS SCHOOL   11X068     GRADE CODE: 130        OFF CLASS: 307
OPT SCHOOL: 11068       OPT GRADE: 03                     DOB: 12/29/99 SEX: F

HOUSE NO: 4527     STREET:  HILL AVENUE                   APT NO: 2
CITY: BRONX                                  STATE: NY    ZIP: 10466
BORO: X                                      STREET NAME CODE: 39820 01010

DISTANCE FROM      CALCULATED: C   (1 MILE OR MORE, BUT LESS THAN 1 1/2 MILES)
HOME TO SCHOOL

SPECIAL ED:            REQUEST 4-TRIP: N        VARIANCE NUMBER: _____

METROCARD NUMBER: 1528039488                 YELLOW BUS STOP NO: ____
  METROCARD TYPE: FULL FARE
  DEACTIVATE CODE: __

Deactivate code must be entered - use F4 for lookup, then F5.
F1/Help     F2/       F3/Quit-return F4/Lookup     F5/Deactivate  F6/
F7/         F8/       F9/Refresh     F10/          F11/           F12/Exit


MA    a                                                          19/020
```

Deactivation Code field will appear
Enter appropriate code or press **F4/Lookup** to see all available codes

List of Deactivation Codes

```
PROFILE 11-X-068        New York City Public Schools        01-11-08 14:29:17
ATS0100               Deactivation Code For Metro Cards        01239-EJACOBS2
==>  _                                                        PAGE 1 OF 1
                                                              TABLE: 519

      CODE        DESCRIPTION
      =========   ================================
      AA          ASSIGNED - STUDENT MOVED
      AC          ASSIGNED - ELIGIBILITY CHANGED BY SCHOO
      AD          ASSIGNED - DAMAGED BY STUDENT
      AL          ASSIGNED - LOST BY STUDENT
      AR          ASSIGNED - WILL NOT READ IN TURNSTILE
      AS          ASSIGNED - STUDENT REPORTED AS STOLEN
      AT          ASSIGNED - STUDENT TRANSFERRED/DISCHARG
      AX          ASSIGNED - PRIOR SEMESTERS CARD
      UL          UNASSIGNED - LOST IN TRANSIT TO SCHOOL
      UM          UNASSIGNED - NOT INCLUDED IN SHIPMENT
      UP          UNASSIGNED - MISPLACED AT SCHOOL
      US          UNASSIGNED - STOLEN AT SCHOOL


      Place cursor next to selection desired and press F2
      F1/Help     F2/Select   F3/Quit-return F4/          F5/Srt by desc F6/
      F7/         F8/         F9/Refresh     F10/          F11/           F12/

MA    a                                    ⇑                      03/006
```

Tab down list and press **F2** to select proper code

Returned to the previous screen once selection is made:

```
PROFILE 11-X-068       New York City Public Schools      01-11-08 14:04:23
TRANO120                 Transportation Data Update          01558-EJACOBS2
==> _
STUDENT ID: [          ]  LAST NAME: [      ]    FIRST NAME: [       ] MI: H
ATS SCHOOL  11X068       GRADE CODE: 130        OFF CLASS: 307
OPT SCHOOL: 11068        OPT GRADE: 03              DOB: 12/29/99 SEX: F

HOUSE NO: 4527    STREET:  HILL AVENUE                    APT NO: 2
CITY: BRONX                              STATE: NY    ZIP: 10466
BORO: X                                 STREET NAME CODE: 39820 01010

DISTANCE FROM      CALCULATED: C   (1 MILE OR MORE, BUT LESS THAN 1 1/2 MILES)
HOME TO SCHOOL

SPECIAL ED:           REQUEST 4-TRIP: N    VARIANCE NUMBER: _____

METROCARD NUMBER: 1528039488             YELLOW BUS STOP NO: ____
  METROCARD TYPE: FULL FARE
 DEACTIVATE CODE: AX


F1/Help     F2/       F3/Quit-return F4/Lookup     F5/Deactivate  F6/
F7/         F8/       F9/Refresh     F10/          F11/           F12/Exit

MA    a                          ⇧                          03/006
```

Selected code will appear in Deactivation Code Field
        Press **F5/Deactivate** <u>twice</u> to confirm

Next Steps

After deactivating the **TLST** screen will appear:
Enter T or F to maintain student record
        Press Right Ctrl: (**AT** or **AF** will appear in **Trans Stat**)

When replacement MetroCard is ready to be distributed:
Bring up student record by entering **U** at **TLST** screen
Tab to MetroCard number field
Enter new MetroCard number over the old one
        Press **F2/Save**
Enter Deactivation Code
        Press **F2/Save** <u>twice</u> to save changes: (**AP** will appear in **Trans Stat**)

  Contact OPT to request additional MetroCards in order to maintain adequate inventory

Additional Information

Review Student History

An individual student's history will display information, adjustments, and activity regarding a student's transportation record. Viewing history may assist in troubleshooting issues and identifying specific changes that affect the student. There are two options to review a student's record:

TLST Screen: This screen will display history information **only from students with active records**. Students without information in Tran Stat will not display any history data.

From the **TLST** Screen

```
PROFILE 11-X-068      New York City Public Schools      01-25-08 14:22:13
TRAN0110            Select Students By Grade Or Official Class    00972-EJACOBS2
==>                                                      PAGE 8 OF 83
DIST: 11 BORO: X SCHOOL: 068    GRADE:      OFFICIAL CLASS:      TRAN STAT:

ACT                                     DST ADR GRD        OFF  TRAN
CDE     NAME            STUDENT ID  SEX   DOB   CDE FLG CDE ELIG CLS  STAT
------------------------------------------------------        140  H   402
                        No History available                   953  S   0
                              M   10/20/01  D  V   140         401
                              F   02/19/98  A  V   140         401
                              M   04/05/02  A  V   310  H   016
                              M   06/16/97  A  V   150         501
                              M   11/16/98  D  V   140  F   404
  H                                            V   110  F   101  AB
                        History for students with V   130  F   303  AB
                             active records      V   130  H   305
                              F   01/27/98  B  V   140  H   403
ACT CDE: METROCARD REQUEST: T = 3 TRIP  F = 4 TRIP
   CURRENT BUS / METROCARD: U = UPDATE  D = DISPLAY  X = DELETE  H = HISTORY
Enter ACT CODE next to desired student and press RIGHT CTRL/RED ENTER
F1/Help    F2/        F3/Quit-return F4/Lookup      F5/           F6/
F7/Back    F8/Forw    F9/Refresh     F10/           F11/          F12/Exit


MA    a                             ⇧                            15/003
```

Enter **H** in **ACT CDE**

      Press Right Ctrl to continue

History Screen will Display

```
PROFILE 11-X-068      New York City Public Schools      01-25-08 14:26:46
TRANO130              Transportation Transaction History    00972-EJACOBS2
==>  _                                                    PAGE 1 OF 1

NAME:                    DOB:          SEX: F  ID:

TA       ADDRESS              ATS SCHL   ---OPT-- DST SPC ED METRO    BUS
CD                            GRD LV CLS SCHL GRD CDE VAR NO CARD #   STOP
== ========================= ========== ======== === ====== ===== == ====
A    BAYCHESTER AVENUE 2        11X068   11068 02  B                  0301
     BRONX, NY         10466 120-02-206
          ENTD:  01/17/07 11:12:17 ADERRIC          TRNSM: 08/23/07 14:51:44

A    BAYCHESTER AVENUE 2        11X068   11068 02  B                  0301
     BRONX, NY         10466 120-02-202
          ENTD:  01/17/07 09:18:10 ADERRIC          TRNSM: 01/18/07 13:38:58

A    BARNES AVENUE 1FL          11X041   11041 02  B    N 5555555555
     BRONX, NY         10467 120-02-204
          ENTD:  09/05/06 ::  LHAYES2             TRNSM: 09/05/06 16:37:13
Press F5 to print
F1/Help   F2/      F3/Quit-return F4/          F5/Print      F6/
F7/       F8/      F9/          F10/Next id    F11/          F12/Exit

MA   a                            ⇧                          03/006
```

Display will show dates of changes, who made changes, and date transmitted to OPT
   Press **F5/Print** if needed

The **TTTH** screen will show history for any student. Schools may review this screen to review past actions or troubleshoot issues.

From the **Transportation Main Menu**

```
PROFILE 11-X-068      New York City Public Schools      01-28-08 10:04:04
TRANO100              Transportation Main Menu          01351-EJACOBS2
==>

         --- METROCARD AND YELLOW BUS - STOP TO SCHOOL ---
       1  TTRE   Eligibility - By Individual Student
       2  TLST   Eligibility - By School, Grade or Official Class
       3  TTTH   Transaction History
       4  TBRM   Run Number / Bus Stop Maintenance
       5  TDMC   Display or Deactivate Metro Card

         --- SPECIAL EDUCATION - DOOR  TO  DOOR ---
       6  STRE   Eligibility - By Individual Student
       7  SLST   Eligibility - By School, Grade or Official Class
       8  STTH   Transaction History
       9  SPLA   List of Biographical Changes
      10  SVER   End of Year Verification (OPT Reconciliation)

                     --- PROJECT READ  ---
      11  PLST   Eligibility - By School, Grade or Official Class
For Transportation reports, enter RTRN on Command Line
Place cursor next to selection desired and press RIGHT CTRL/RED ENTER
F1/Help   F2/      F3/Quit-return F4/          F5/Stats      F6/
F7/       F8/      F9/Refresh    F10/          F11/Inventory F12/Exit

MA   a                                                       03/006
```

Enter **3** or **TTTH** at the Command Line
   Press Right Ctrl

Enter **ID Number** of Student

```
PROFILE 11-X-068        New York City Public Schools        01-28-08 10:06:53
TRAN0130                Transportation Transaction History       01351-EJACOBS2
==>  _

NAME:                     DOB:          SEX:      ┌─ ID: . . . . . . . . . ─┐
                                                  └────────────────────────┘
TA         ADDRESS               ATS SCHL   ---OPT-- DST SPC ED METRO     BUS
CD                              GRD LV CLS  SCHL GRD CDE VAR NO CARD #    STOP
==  ============================  ========== ======== === ====== ===== == ====




















     Enter student id and press RIGHT CTRL/RED ENTER
     F1/Help     F2/         F3/Quit-return F4/            F5/Print      F6/
     F7/         F8/         F9/            F10/Next id    F11/          F12/Exit

MA    a                                  ⇧                            03/006
```

Press Right Ctrl

Review or Print history by pressing **F5/Print**

```
PROFILE 11-X-068        New York City Public Schools        01-28-08 10:10:22
TRAN0130                Transportation Transaction History       01351-EJACOBS2
==>  _                                                         PAGE 1 OF 1

NAME:                     DOB: 02/18/98  SEX: F  ID:

TA         ADDRESS               ATS SCHL   ---OPT-- DST SPC ED METRO     BUS
CD                              GRD LV CLS  SCHL GRD CDE VAR NO CARD #    STOP
==  ============================  ========== ======== === ====== ===== == ====
A   737 EAST 237 STREET 2FL         11X021   11021 KF  B     Y  0834853925
    BRONX, NY              10466  319-OK-014
         ENTD:  01/20/04  13:53:23  BMADERA          TRNSM: 01/20/04 15:34:40

A   737 EAST 237 STREET 2FL         11X021   11021 KF  B                   0105
    BRONX, NY              10466  310-OK-014
         ENTD:  09/15/03  09:56:47  BMADERA          TRNSM: 09/15/03 15:53:02




     Press F5 to print
     F1/Help     F2/         F3/Quit-return F4/            F5/Print      F6/
     F7/         F8/         F9/            F10/Next id    F11/          F12/Exit
```

(This student's record was changed from Yellow Bus transportation to MetroCard in <u>January, 2004</u>)

Transportation Reports

Utilizing the report functions in ATS, along with **F5/Stats** and **F11/Inventory** information, helps schools manage and identify transportation issues that require action or resolution. School staff should review reports on a regular basis to familiarize themselves with each report's content and use. All reports allow users to select specific criteria: by student, class, grade, etc. Review screen options to create reports in the best format for review and action.

Report Name	Information and Use
RTRR – Ridership Report	Lists students that have been documented for transportation in ATS. Review for corrections necessary to Transportation Status, MetroCard Assignment, Bus Stop assignment
RTWK – Transportation Worksheet	Lists students that have no transportation record but are eligible for half- or full-fare transportation. Review to see if students needing transportation have been overlooked
RTBS – Bus Stop Report	Lists all students that have been assigned Yellow Bus Transportation. Report includes stop number and intersection, and name and address of students at each stop location
RTPL – Passlog Report	Lists all students assigned MetroCards. Listed by type of MetroCard and card number assigned

Access Reports in ATS: From Transportation Main Menu

Enter **RTRN** at the Command Line to access the Transportation Reports Screen

Press **Right Ctrl**

Transportation Reports Menu will display

```
PROFILE 11-X-068      New York City Public Schools       01-15-08 14:41:09
REPT1000              Transportation Reports Menu         01745-EJACOBS2
==> _

        1  RTRR    Gen Ed Students w/Assigned Transportation - Metro or Bus
        2  RTSM    Yellow Bus Summary Report
        3  RTWK    Gen Ed Eligible Students w/o Transportation
        4  RTBS    Approved Yellow Bus / Bus Stop Report
        5  RTRT    Registration For Transportation Service
        6  RTRU    Bus Stop / Run Number Report
        7  RTPL    Gen Ed Students w/Assigned Transportation - Metro Card

        8  RDRS    Door To Door Ridership Report

        9  RPRR    Project Read Ridership Report




    Place cursor next to selection desired and press RIGHT CTRL/RED ENTER
    F1/Help    F2/        F3/Quit-return F4/Lookup      F5/            F6/
    F7/        F8/        F9/Refresh     F10/           F11/           F12/Exit



MA    a                                                                03/006
```

Enter **Report Type** <u>code</u> or <u>number</u> in the <u>Command Line</u> to select
  Press Right Ctrl

For all Reports
Review screen instructions
Select desired information or select to view entire school data
  Press **F6/Execute** to print Report

Managing Transportation Deadlines

At specific times of the year OPT will notify schools to review and, if necessary, correct or update ATS data in order to manage key processes. Schools should review **ATS News** and the **OPT Web site** for instruction and assistance in managing these functions. Generally, OPT will identify and communicate deadlines in advance of a large project: new MetroCard shipments; summer school information; and review of session times and extended day indicators. Because OPT relies so heavily on accurate data it is important for school staff to be aware of these critical deadlines and take appropriate action to ensure transportation services for students are not interrupted.

ATS Functions that Impact Transportation

Understanding these key functions will help school staff better manage transportation services for their students. In each case, schools should rely on Transportation Account Managers and Special Education Transportation Liaisons at their ISC for guidance and support.

Address Verification

Home address, along with grade level, is critical in determining eligibility for transportation. When a student's address is changed in ATS, the new address is verified based on city planning maps. The verification process generally takes 24 hours. If the process takes longer, schools should review and troubleshoot the issue. If an address change is not verified within two days schools should review and double-check that the address has been entered correctly:

- Street must be entered with the required east/west designation
- Verify that the address is listed correctly with avenue, street, road, place, etc
- The address must be within the five boroughs of New York City

If the address entered is the correct address, schools should contact their Transportation Account Manager at the ISC for more information and assistance.

> **Please Note:**
> Once an address change is verified and results in a change of eligibility for the student, the correct eligibility code is displayed on the **TLST** screen: Schools must update the individual student record to reflect the new eligibility. This may require deactivation of an assigned MetroCard and issuance of a new Metrocard or deletion of a Yellow Bus stop and issuance of a MetroCard. It is important to review new eligibility status each time an address change is entered and verified in ATS.

Extended Day Indicators flag students that attend extended day sessions at their schools. Identifying students that arrive earlier than the regular session time (or stay later than the regular session time) is critical to creating effective bus routes that serve children properly. OPT transfers extended day indicator data from ATS after a deadline date set in mid- to late-September. All students flagged for extended day sessions have their routes adjusted based on the data entry. Students adjusted after this deadline will not appear in OPT databases: changes after the deadline will be managed on a case-by-case basis and routes will be adjusted whenever possible: schools should contact their Transportation Account Manager at their ISC for more information and assistance.

School Session Times Impact Transportation

Session Times provide OPT with critical information in order to route buses effectively: what time buses need to arrive at school in order for students to be on time when school begins; what time buses need to arrive at the school to pick up students at the end of the day. OPT also uses this information to hold vendors accountable for services and contract compliance. OPT advises schools to review and adjust session times in June for the following school year: these requests can be accommodated and will generally be granted after a review by the DOE Legal Office to ensure session times adhere to NY State Education Department and DOE guidelines. Requests made after the beginning of the school year will be handled on a case-by-case basis: schools should contact their Transportation Account Manager at the ISC for more information and assistance. Review current session time data on the **OPT Web site**. Regular session times and extended day schedules are shown for each school.

Assistance and Support

School staff with questions regarding ATS access and specific non-transportation related ATS procedures should call the ATS Help Desk (718) 935-5100.

The OPT Customer Service Unit (718) 392-8855 takes calls from school personnel requesting transportation-related ATS assistance. Agents will record contact information and OPT staff will contact customers to provide assistance and walk-through procedures as needed. Issues requiring additional research or higher level help services will be elevated to speed resolution.

Managing ATS and student data can be complicated when discussing guidelines and procedures for specific programs and students. Schools should rely on support and guidance from staff at their ISC: Transportation Account Managers; Special Ed Transportation Liaisons; and Students in Temporary Housing (STH) content experts. The OPT Customer Service team can also refer staff to the appropriate department within OPT that can offer assistance. OPT Training provides over-the-phone assistance for most ATS transportation-related questions, as well as periodic professional development workshops focusing on providing all schools with resources and information to best manage services for eligible students.