Department of Education
Cathleen P. Black, Chancellor

OFFICE OF PUPIL TRANSPORTATION

ATS TRANSPORTATION PRACTICES AND PROCEDURES GUIDE

Office of School Support Services
44-36 Vernon Blvd
Long Island City, NY 11101
OPT Customer Service: (718) 392-8855
OPT Web address: http://schools.nyc.gov/Offices/Transportation

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

1. Provides OPT with information regarding Yellow Bus stop assignments to allow efficient routing of students eligible for stop-to-school transportation.
2. Tracks assignment and inventory of student MetroCards
3. Maintains accurate student address and contact information in order to identify eligibility for transportation and to efficiently route Special Education students receiving door-to-door service.

These materials have been created 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. 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 means the student may receive a full fare MetroCard **or** Yellow Bus transportation

Half Fare means the student may elect to receive a half fare MetroCard for use on MTA buses: students pay half ($1.10) of the required fare

<div align="center">

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

</div>

Busing
OPT provides two distinct types of bus transportation for eligible students: stop-to-school transportation generally for General Ed students (and some SE students) and door-to-door transportation for SE students with IEP mandates that require specialized transportation. Which type of service a student receives relies on key information provided to OPT by school staff using ATS. Specific information regarding Special Ed students requires consultation and communication between schools, CFN Liaisons, and, 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, a student may be assigned to a Yellow School Bus Stop. 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, and students may have different bus routes for AM and PM. Schools assign individual students to bus stops in ATS. Creating new stops, adjusting existing stops, and deleting stops no longer in use is done by school staff using the OPT 199 application—stops are created specifically for individual schools 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)
OPT handles the routing for these students. Special Ed students receive Specialized Transportation (door-to-door service) based on determinations summarized in the student's IEP. In addition to the requirement for specialized transportation, additional accommodations may be approved based on medical documentation provided by the child's physician and discussed during annual IEP reviews.

> Student Address changes are a two-step process
>> Pupil Accounting Secretaries manage student address and contact information: these changes are reviewed and processed by the CFN liaison to notify OPT to change student routes.
>
> Changes to student IEP reviewed and approved by CFN liaison
>> School Assessment Teams (SAT) work with parents and CFN staff to discuss student IEPs to identify and update medical accommodations for students requiring specialized transportation. CFN Liaisons and DOHMH physicians review medical documentation to finalize approval and changes to a student's required transportation.

OPT changes routes based on data changes received daily

> OPT receives updates and adjusts student routes once updates are completed at the school and CFN. Route changes are generally effective seven days after updating a route. Letters are sent to parents advising them in the event of a route change.

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.

Address Changes for Special Education Students

Staff at public schools should contact their CFN liaison via email to complete an address change for students receiving door-to-door service.

> First: the new address must be updated on the student BIO screen in ATS at the school level.
>
> Second: the new address must be entered on the STRE screen in ATS by the CFN liaison

The next day after the update has been made on the STRE screen, the OPT operations team receives notice of the change and will review and make changes to the student's route. Most route changes, once made, are effective within seven days in order to notify bus vendors and parents of other students that may be affected by the change.

MetroCards

MetroCards are distributed to eligible students by school staff for travel to and from school. Specific information regarding proper use, reordering, 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 available 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 $1.10 after dipping their MetroCard in the card reader.

School staff is responsible for these key actions:

- Assigning MetroCards only according eligibility as listed on the TLST screen in ATS
- Using a paper log to record distribution of individual cards (and replacement cards) to eligible students. Information required is student name. serial number of MetroCard assigned, date, and student initials to acknowledge receipt of the card
- Recording serial numbers for each card on each student's individual record in ATS
- Deactivating lost or stolen cards and providing replacements
- 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. Existing students will have **AP** TRAN STAT: other students assigned Action Code **T** or **F** if they request a MetroCard for the upcoming year
- Review Inventory screen in ATS on a regular basis to have replacement cards on hand at all times
- 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
- Distribute cards at the beginning of the school term
- Review student eligibility in ATS: review TLST screen for the most current data
- Distribute cards only to eligible students: Provide correct type of MetroCard for student's eligibility
- Maintain a distribution log listing the student name and the serial number of the MetroCard provided
- Have students sign for receipt of MetroCard: Maintain logs for six years
- Do not withhold or delay MetroCard distribution in order to receive required forms or documentation from students
- Replace lost cards as soon as possible: No charge to students for replacement cards

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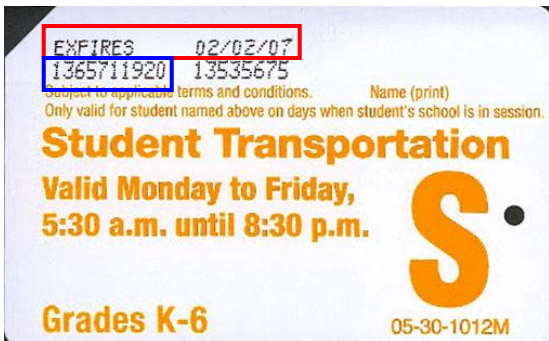
Each Student MetroCard has a ten-digit serial number
- Schools use the ten-digit serial number when assigning individual cards to students in ATS

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 $1.10—Valid only on MTA Buses Half-Fare MetroCards are **Green** and have **Bus Only** on the face of the card
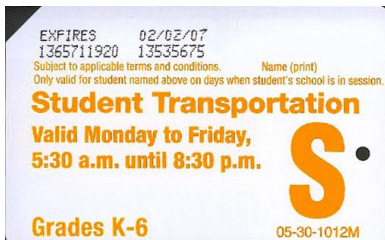
K-6 Full Fare MetroCard (Orange)	7-12 Full Fare MetroCard (Green)	K-12 Half Fare MetroCard (Green)
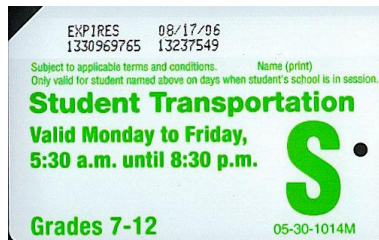
Cards sent to schools but not recorded on Individual Student Records in ATS
Special Program Two-Trip Card – Used for after school and other programs. These cards must be distributed and recorded according to program rosters
PSAL Athlete Cards – Sent to High Schools based on roster entries completed by Athletic Directors

Cards available for purchase by schools	
PO	**Gold MetroCards** Two Trips Ordered by schools using FAMIS – requires purchase order Cost per card $4.50

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

Variance codes are also used for students approved to receive transportation services outside of OPT's regular protocols, including Variance requests submitted to OPT bys parents and schools, NCLB PSC students, 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 their School Assessment Team (SAT) and CFN liaison to resolve issues and discuss best practices. CFN liaisons **must** review and approve all adjustments to mandated transportation requirements recorded on IEP for Special Education students.

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** (Tran Stat) codes on the TLST screen should be reviewed to 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 walking distance from school, determines the type of transportation they will receive. ATS automatically displays a student's eligibility:

H – Half Fare   Student may receive a 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. Special Ed students receiving door-to-door transportation **may not** receive MetroCards

Blank—Not Eligible   Student may not be assigned transportation

Eligibility is based on both grade <u>and</u> distance. Eligibility may change when a student changes their home address but may also change as the student advances in grade even though their home address remains the

same. Eligibility is adjusted when students enter third grade and seventh grade but only affect students with specific distance codes. Schools should review pending changes and notify parents in advance whenever possible. The chart below outlines eligibility changes as a student advances in grade.

Students advancing from 2nd grade to 3rd grade		
Full fare eligible students in grades K-6 may be assigned MetroCard or Yellow Bus stop		
Distance Code	Eligibility in grade 2	Eligibility in Grade 3
A	Half Fare	**CHANGE** to Not Eligible
B	Full Fare	**CHANGE** to Half Fare
C	Full Fare	Full Fare
D	Full Fare	Full Fare
Students advancing from 6th grade to 7th grade		
Students in grades 7-12 receive MetroCards only		
Distance Code	Eligibility in grade 6	Eligibility in Grade 7
A	Not Eligible	Not Eligible
B	Half Fare	Half Fare
C	Full Fare	**CHANGE** to Half Fare
D	Full Fare	Full Fare

Key Transportation Screens in ATS
Stat Screen

This screen is shown when logging in to ATS and accessing Transportation and provides a quick snapshot regarding transportation services at the school

Number of students eligible to receive MetroCards
Number of students with MetroCards assigned on their records
Number of MetroCards deactivated
Number of students with assigned Yellow Bus Stops
Records that need to be reviewed and updated (Suspended)
Last Transmission date is the last time data from ATS was retrieved by OPT

Schools can view the Stats screen from the main transportation menu by pressing **F5/Stats**

Inventory Screen

The Inventory screen details the number of MetroCards, by type, that have been sent to the school. Each time a MetroCard is assigned to a student, the number of cards in inventory changes. Additional MetroCard shipments will also be reflected on the Inventory screen. Schools can view the Inventory screen from the main transportation menu by pressing **F11/Inventory**

TLST – Eligibility by School, Grade, or Official Class

This screen displays the most current eligibility information for a student

Distance Code
Eligibility
Transportation Status

The screen also allows staff to perform specific actions regarding the student's record

T or **F** – Identify students that will receive MetroCards
Update – Make a change to a student record
Display – Display a record without making changes
Delete (**X**)– Delete the transportation currently provided for student
History – Show transportation history for the student with assigned transportation

TUTD – Individual Student Record

This screen is used to make changes to an individual student's record

Assign a Yellow Bus stop number
Assign a MetroCard serial number
Deactivate an assigned MetroCard
Enter Variance numbers

Best Practice Scenario: Schools should always review and assign transportation to students based on eligibility information displayed on the TLST screen. Information displayed on the student record represents eligibility based on the last time an update was made on a student's record.
Example:

Jon Greenwood is in second grade, B distance code, and is eligible for and assigned a full fare MetroCard
The following September, now in third grade, Jon becomes eligible for a half-fare MetroCard
The TLST screen will show the updated H eligibility
The individual record will show the eligibility John had the previous year when he was assigned a full fare MetroCard
To resolve the discrepancy:
Find John's record on the TLST screen
Delete the transportation record

Press U to update the record
The eligibility on the individual record will now reflect the correct eligibility and John can be assigned a half fare MetroCard

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 and schools can request variances through OPT for the following issues:
Medical
Student request for transportation based on medical issue: reviewed by DOE Medical for approval
Hazard
Student request for transportation due to hazardous condition on walking route to school
Access
Student request for transportation due to lack or infrequency of public transportation service
Emergency
Student request for transportation due to emergency situation
Distance Dispute
Parent requests verification of distance calculation that determines eligibility
Shelter
Shelters submits a completed shelter variance for to OPT to identify a student in their facility requests transportation

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.

Variance Entry in ATS
Documentation from OPT approving a variance include the variance number and, if applicable a variance stop created for the student. The stop number (variance stops begin with 75) and the variance number must be entered on the student's individual record at the same time and saved. Please note that variance stops are created for and can only be assigned to a specific student – schools may not assign variance stops to other students.

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/CFN 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 in ATS (this information is also on the list of routed stops in 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. School staff should contact OPT Customer Service to request assistance: OPT training staff can assist schools through each step of the process.

In order to receive stop-to-school transportation and student must meet the following criteria
1. Full fare eligible (displayed on TLST)
2. Stop exists or new stop granted using OPT 199 application
If a stop does not exist or cannot be added, a student may only receive a MetroCard

> **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 the 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 no longer than five miles as measured by bus stops.
> Contact your OPT Account Manager to discuss this issue
> 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.

No Child Left Behind (NCLB)

Students transfer from a School in Need of Improvement (SINI) or School Under Registration Review (SURR) through the Public School Choice (PSC) program, one of the provisions of Federal NCLB legislation. Transportation eligibility is calculated and handled differently for these students. Parents accepting NCLB PSC transfers receive letters outlining the type of transportation their child will receive.

Full fare eligible students in grade K-6

OPT creates a bus stop (NCLB stop) for these student. The stop number (all NCLB stops start with 95) must be entered in ATS on the student's record screen along with the NCLB variance number (N2003) and saved. OPT communicates with schools when these stops have been created. Please note that NCLB stops can only be assigned to an NCLB student – schools will not be able to assign NCLB stops to students not enrolled through NCLB

Full fare eligible students in grades 7-12

These students receive a full fare MetroCard for travel to and from school.

Half fare eligible students

Under NCLB guidelines these students are entitled to receive a full fare MetroCard: assign a full fare MetroCard and the NCLB variance number on the student's record.

Assigning NCLB stops in ATS

NCLB stops are created by OPT operations staff after notification that the student is enrolled under NCLB. OPT will notify schools of routed NCLB stops, including the address or intersection of the new stop. The stop must be entered on the student's record in ATS.

From TLST screen enter **U** to update student record

Enter the new NCLB stop number and the NCLB variance number on the record and save

Handling an address change for a NCLB student

Use the procedure outlined below to notify OPT that a NCLB child has changed address so a new stop can be created.

Enter new address on BIO screen in ATS

Wait one day

From TLST screen: Delete transportation for student (ACT CDE **X** next to student name)

Enter **U** to update student record

Enter stop number 9999 **and** NCLB variance number and save record

OPT will review this data the next day and work to create a new NCLB stop for the student's new address

Please Note: Eligibility for students transferring to different schools using a transfer from a Persistently Dangerous Schools (PDS), or Progress Report Transfer (PRT) is handled differently.
For these two programs eligibility is calculated using standard OPT guidelines. Yellow Bus transportation is not guaranteed.

Gifted and Talented Programs

Transportation and eligibility for transportation for students enrolled in Gifted and Talented programs is determined using standard eligibility guidelines. Transportation by yellow bus is not mandated.

> Students residing outside the district
>> Yellow Bus service will not be provided: students will receive a full fare MetroCard for travel
>
> Students residing within the district
>> Yellow Bus service will be provided if the school has Yellow Bus service and a stop can be created using the OPT 199 application.
>>
>> If the school does not have Yellow Bus service or a stop cannot be created by the school, students will receive a full fare MetroCard for travel.
>
> Students above grade 6 will receive MetroCards for travel
>
> Six citywide Gifted and Talented programs do allow for Yellow Bus service within the borough, crossing district lines, if a stop can be created for the student using the OPT 199 application.

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  ===>

MA    a                                                          22/016
```

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

MA    a                                                          03/006
```

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


MA    a                                                           03/006
```

From the Primary menu:
Select **Supplemental Services (SVCS)** by entering **2** or **SVCS** at the <u>Command Line</u>
    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


MA    a                        ⇑                                  03/006
```

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

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.

```
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

A    a                           ⇧                          03/006
```

MetroCards		
Use the MetroCard **Inventory Screen** to verify inventory and calculate amount required for additional shipments		
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 the ISC/CFN 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 22-K-052        New York City Public Schools        09-22-08 09:38:37
TRAN0100                   Transportation Main Menu            01962-EJACOBS2
==> 2 .
              --- 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
        6  TMPS    Metro Card Mass Entry
        7  FTRN    Future Yellow Bus Request
              --- SPECIAL EDUCATION - DOOR  TO  DOOR ---
        8  STRE    Eligibility - By Individual Student
        9  SLST    Eligibility - By School, Grade or Official Class
       10  STTH    Transaction History
       11  SPLA    List of Biographical Changes
       12  SVER    End of Year Verification (OPT Reconciliation)
                      --- PROJECT READ   ---
       13  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                          ⇑                            03/007
```

```
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


MA    a                          ⇑                            03/006
```

Press **Right Ctrl** to continue

Shipped MetroCard	Total number of cards of each shipped to the school to date: additional shipment amount will effect this number
Assigned MetroCard	Number of student records that have AP status: a MetroCards serial number has been assigned on the student's record
Deactivate MetroCard	Number of MetroCards deactivated by the school
Assigned 5555555	Number of student records with AT status: student should receive a MetroCard but a card has not been assigned to the student
OPT MetroCard team will review this screen to determine if shipment requests will be granted: the number of assigned and deactivated MetroCards must match the total number of cards shipped in order to receive replacement cards; the number of students assigned 555555 must exceed cards on hand in order to receive additional cards	

Always review the Inventory screen prior to making requests for additional MetroCards. Submit requests for additional cards using this email address: **publicschoolmetrocards@schools.nyc.gov**. Include the ATS and OPT school code in the subject line, contact information, and a list of MetroCards needed by quantity and type.

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 11-X-087        New York City Public Schools        10-02-08 08:03:42
TRANO100                  Transportation Main Menu            01802-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
       6  TMPS    Metro Card Mass Entry
       7  FTRN    Future Yellow Bus Request
              --- SPECIAL EDUCATION - DOOR  TO  DOOR ---
       8  STRE    Eligibility - By Individual Student
       9  SLST    Eligibility - By School, Grade or Official Class
      10  STTH    Transaction History
      11  SPLA    List of Biographical Changes
      12  SVER    End of Year Verification (OPT Reconciliation)
                       --- PROJECT READ ---
      13 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
```

From the **Transportation Main Menu** select **TLST** to view and update student records. This function will allow you to view all students, or students by official class or grade
    Press **Right Ctrl**

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**.

A screen to select sorting options will display:

```
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
```
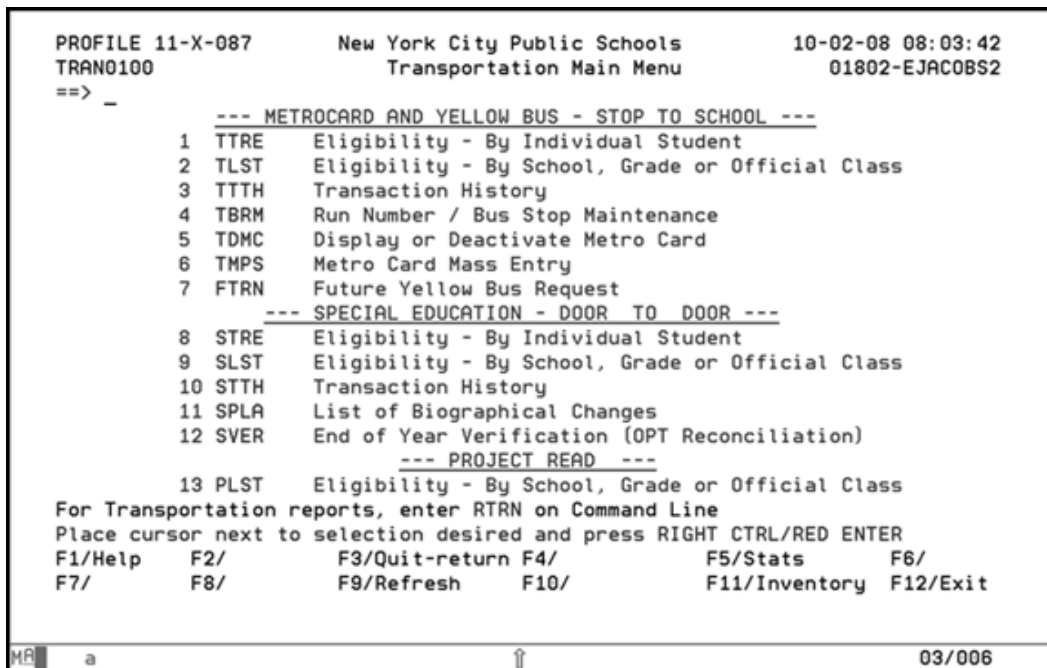
To see all students: Press **Right Ctrl**
To view a specific Grade or Class: move cursor to field, enter grade or class then press **Right Ctrl**

For this step we left fields blank to view all students

```
PROFILE 11-X-068        New York City Public Schools        12-26-07 09:32:59
TRAN0110            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. Identify an eligible student that will receive a MetroCard (use this function if you do not have MetroCards available in inventory)

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

2. Use one of the Action codes to Update, Display, Delete, or view the history of a student record
   Enter U to update a record, 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**

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

Update Individual Record 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 **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**
Enter the deactivation code (press **F4/Lookup** to review and choose code. List on P 23)
Press F5/Deactivate twice
The old MetroCard number will be deactivated
The new MetroCard number is saved on the student's record

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

Update Individual Record 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
 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 **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          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:          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: __

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
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            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

MF    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**)

Email pubclicschoolmetrocards@schools.nyc.gov to request additional cards

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
--------------------------------------------------------------------------
                                        B  V 140  H   402
                                    01  D  V     S   019
                                F  02/19/98  A  V 140       40
                                M  04/05/02  A  V 310  H   016
                                M  06/16/97  A  V 150       501
    H                           M  11/16/98  D  V 140  F   404
    H                           M  04/03/01  B  V 110  F   101   AB
                                                       F   303   AB
                                                       H   05
                                                       H   403
ACT CDE: METROCARD REQUEST: T =
    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
TRAN0130          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-087      New York City Public Schools      10-02-08 08:03:42
TRAN0100                   Transportation Main Menu          01802-EJACOBS2
==> 3_
              --- 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
          6  TMPS     Metro Card Mass Entry
          7  FTRN     Future Yellow Bus Request
                  --- SPECIAL EDUCATION - DOOR  TO  DOOR ---
          8  STRE     Eligibility - By Individual Student
          9  SLST     Eligibility - By School, Grade or Official Class
          10 STTH     Transaction History
          11 SPLA     List of Biographical Changes
          12 SVER     End of Year Verification (OPT Reconciliation)
                          --- PROJECT READ  ---
          13 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                                                          03/007
```

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  319-0K-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  310-0K-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 January, 2004)

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 <u>Transportation Main Menu</u>

```
PROFILE 11-X-087       New York City Public Schools      10-02-08 08:03:42
TRAN0100                 Transportation Main Menu          01802-EJACOBS2
==> rtrn_
              --- 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
         6   TMPS    Metro Card Mass Entry
         7   FTRN    Future Yellow Bus Request
              --- SPECIAL EDUCATION - DOOR  TO  DOOR ---
         8   STRE    Eligibility - By Individual Student
         9   SLST    Eligibility - By School, Grade or Official Class
        10   STTH    Transaction History
        11   SPLA    List of Biographical Changes
        12   SVER    End of Year Verification (OPT Reconciliation)
                        --- PROJECT READ   ---
        13   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                            ⇧                              03/010
```

Enter **RTRN** at the <u>Command Line</u> 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 CFN staff, OPT Account Managers, and OPT Training 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 CFN Liaison for 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.

Summer School Indicators: Schools and OPT identify students needing transportation based on Summer School Indicators entered on SSPR screen in ATS
Schools begin identifying students with the Promotion in Doubt code in ATS in mid-March. Throughout the spring, these records are edited, with students mandated to attend summer sessions assigned the code M. OPT provides transportation for students underlined mandated to attend summer sessions. Students receive the same type of transportation they received during the regular school year, Yellow Bus or MetroCard. Summer MetroCard shipments are based solely on summer school indicators. Special Education students with 12-month IEPs receive transportation for their summer programs. Additional, detailed information regarding summer school protocols are distributed through the spring.

School Session Times: Schools review and request session time changes in spring for the following September
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 service and contract compliance. Principals use a web-based application (link located on Principal's Portal) for schools to review, confirm, and adjust their session times for the upcoming school year. Session time changes are reviewed and approved by both the Office of Labor Relation (OLR) and OPT to ensure proper schedules are developed. Review current session time data on the OPT Web site. Regular session times and extended day

schedules are shown for each school. Requests to change school session times after the data entry deadline will not be honored.

Extended Day Indicators: **Schools identify students attending extended day sessions: OPT arranges bus routes to accommodate these students**
Schools identify 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. Updates are made using the BIOC screen in ATS: Updates to the FUT EX INSTR PD are completed in June and July. Updates to the EX INSTR PD are completed after the grade bump in mid-July. OPT downloads extended day indicator data from ATS at three key times each year
1. At the end of the school year: schools should update these indicators for all students remaining at the school the following year
2. In mid-July: schools should review indicators to ensure accuracy
   Students with indicators entered by the mid-July deadline will be routed according to these indicators beginning in September
3. In mid-September: schools can enter indicators for new students
   Students with indicators entered prior to this deadline will have their routes updated in mid-October

Adjustments made to these indicators after the mid-September date will not be honored (OPT will make exceptions for students enrolling in schools after the deadline)

Assistance and Support
Schools have a range of support structures to assist them in managing transportation:
1. Basic Information: Schools staff should encourage parents to use P311, the OPT web site Student Search, or call the OPT Customer Service team (718 392-8855) for basic route information
2. The OPT web site has information and applications for schools to review bus ridership, enter service complaints, book field trips, discuss eligibility, and other information.
3. Schools and parents should always call OPT Customer Service to report service issues (lateness, no pick-up) or issues with drivers or monitors on the bus
4. School staff should contact their CFN Transportation Liaison to help resolve chronic service issues or clarification on procedures. OPT Account Managers assist CFN staff in problem-solving and resolving service issues

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 their CFN liaisons and OPT. 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.