

## MetroCard Practices and Procedures For Public Schools and Charter Schools using ATS

Managing MetroCard distribution and inventory at individual schools requires attention to detail and focusing on key deadlines at specific times of the school year. This MetroCard overview will cover these main topics:

1. Three tasks critical to managing MetroCard inventory
2. How OPT determines quantities for initial fall, spring, and summer shipments
3. How to request additional or replacement MetroCards
4. Steps for managing the transition from fall to spring MetroCards
5. Assigning and Deactivating MetroCards in ATS

### **Three tasks critical to managing MetroCard Inventory**

To effectively manage the distribution and inventory of student MetroCards, schools must manage three key tasks, each of which directly affects MetroCard inventory tracked in ATS:

1. Distribute MetroCards based on a student's current eligibility displayed on the **TLST** screen in ATS. This critical step will reduce the possibility of providing the wrong type of MetroCard to a student, which cannot be recorded properly in ATS, affecting inventory.
2. Assign the serial number of the MetroCard provided on the student's individual record (**TUTD**) in ATS. Assigning the card will update the student's transportation status and the MetroCard inventory to reflect that a card has been properly accounted for.
3. Deactivate and replace lost, stolen, or non-working MetroCards quickly. Deactivated MetroCards are tracked in inventory data.

Review the information included in the initial shipment for step-by-step instructions and additional information for handling your MetroCard Inventory.

### **How OPT determines initial shipments of MetroCards for schools**

OPT ships MetroCards to schools based on the Transportation Status (**TRAN STAT**) for each student displayed on the **TLST** screen in ATS. Cards are sent for each student with either **AT** (MetroCard Requested) or **AP** (MetroCard Assigned). MetroCards for students attending summer school are sent based on a student's summer indicator on the **SPLR** screen in ATS. Cards are shipped to schools in late August for the fall term, mid-January for the spring term, and late June for summer programs. OPT will post specific deadlines and key dates in the Principal's Weekly, DSSI Weekly, as well as ATS News.

### **How to request additional or replacement MetroCards**

Before requesting additional cards, check your MetroCard Inventory screen to review inventory status: OPT will not ship additional cards unless supported by inventory data. Manage your requests for additional cards to maintain a 10-15% cushion in order to be able to provide replacement cards quickly: always order additional cards before running out.

The MetroCard Inventory Screen (press the **F11/Inventory** key at the Transportation Main Menu) displays the following information:

1. MetroCards Shipped: This is a running total of the number of cards, by type, sent to a school through the term
2. MetroCards Assigned: This is a tally of student records with Transportation Status (TRAN STAT) of **AP** on the **TLST** screen in ATS
3. Deactivated: This is a tally of the number of MetroCards deactivated
4. Assigned 55555: This is a tally of students with TRAN STAT of **AT**. These are records where a MetroCard has been requested but not assigned on the student record

When schools request additional MetroCards, OPT compares the total number shipped, less cards assigned and deactivated.

*Example:*

E1 MetroCards

Shipped	250
Assigned	195
Deactivated	45
Assigned 55555	15

250 cards less 195+45 (240) =10 cards on hand at school

School has 15 students with AT status (waiting for card to be assigned)

Schools could request 5 cards to meet needs plus 20-25 cards for future replacements

Request additional MetroCards directly through OPT using the following email address: [publicschoolmetrocards@schools.nyc.gov](mailto:publicschoolmetrocards@schools.nyc.gov)

Please use the following guidelines when submitting your request

1. Include the school's ATS Code and OPT code in the subject line  
*Ex: 27Q202/27202 Additional MetroCard Request*
2. List number and type of cards requested  
*Ex: 25 E1 cards, 15 H2 cards, etc*
3. Include contact information  
Name and phone number

**Managing the transition from fall to spring MetroCards**

In mid-January, ATS will be updated to reflect shipments of spring MetroCards, and student data will be changed to allow schools to assign MetroCards for the new term. Revised inventory figures will reflect the spring shipments, and all students' Transportation Status on the TLST screen will be changed to **AT**. Schools should print a copy of the RTPL report for use as a log to record assignments of Spring MetroCards. When distributing spring MetroCards, remind students they will not work in subway turnstiles or on the bus until the activation date.

**Please note:** For the period between the ATS update and the start of the spring term, schools will be unable to deactivate or assign fall MetroCards on student records. Schools should record cards assigned on a paper log during this period.

## Assigning and Deactivating MetroCards in ATS

### Assign a student MetroCard in ATS

From the **TLST** screen

- Find student name on **TLST** screen
- Verify Eligibility: ensure proper card is being assigned to student
- Verify Transportation Status (TRAN STAT) column on far right of screen:
  1. If blank, new ATS users should **T** student first, then follow steps below to assign serial number on the student record
  2. If **AT**, continue process below to update
- Enter **U** in ACT CDE column to update record: Press Right Ctrl: Student record (TUTD) will display
- In MetroCard number field, enter the 10-digit serial number of the card provided to the student
- Press **F2/Save** twice to save the serial number on the student record and be redirected back to the TLST screen

Student will have **AP** in TRAN STAT column: MetroCard has been assigned on student record and inventory reflects an additional card assigned

### Deactivate a student MetroCard in ATS

From the **TLST** screen

- Find student name on **TLST** screen
- Enter **U** in ACT CDE column to update record. Press Right Ctrl: Student record (TUTD) will display
- Press **F5/Deactivate** to deactivate assigned card: Message will prompt entry of deactivation code
- Enter code or press **F4/Lookup** to select code
  - If using Lookup, tab to selected code and press F2 to select
- Press **F5/Deactivate** twice to complete deactivation and return to TLST screen

Student's TRAN STAT will be blank: T student to update inventory to reflect card requested

### Deactivate and Assign Replacement MetroCard in ATS

From the **TLST** screen

- Find student name on **TLST** screen
- Enter **U** in ACT CDE column to update record. Press Right Ctrl: Student record (TUTD) will display
- Enter serial number of new card over existing number
- Press **F5/Deactivate** to continue: Message will prompt entry of deactivation code
- Enter code or press **F4/Lookup** to select code
  - If using Lookup, tab to selected code and press F2 to select
- Press **F5/Deactivate** twice to complete deactivation and return to TLST screen

Student's TRAN STAT will be **AP**: inventory will reflect MetroCard assigned, previous card deactivated