

## **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 your MetroCard inventory
2. How OPT determines quantities for initial fall and spring shipments
3. How to request additional or replacement MetroCards
4. Steps for managing the transition from fall to spring MetroCards
5. Requesting, assigning, and deactivating MetroCards using ATS

#### **Three tasks critical to managing your 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, which will affect 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 your initial shipment for step-by-step instructions and additional information for handling MetroCard distribution and inventory.

#### **How OPT determines quantities for initial fall and spring shipments**

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 who has **AP** status (MetroCard assigned). MetroCards for students attending summer school are based on a student's summer indicator on the **SSPR** screen in ATS. Cards are shipped to schools in late August for the fall term, in mid-January for the spring term, and in mid-June for summer school. Initial shipments include an additional amount to cover replacements and newly enrolled students. Most important in the fall, incoming students that request MetroCards must have their records updated in order to receive an accurate shipment for the spring term.

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

Prior to requesting additional cards, check your MetroCard Inventory screen. OPT will not ship additional cards unless supported by your inventory data. Follow these troubleshooting tips:

- Make sure all students requesting cards have AT status on the TLST screen
- Maintain a cushion of 10% for each type of card to be able to manage replacements quickly (Calculate this total figure by multiplying the number assigned by 1.1)
- Deactivate and replace lost MetroCards when students report this issue to you
- Always order MetroCards before running out

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

1. MetroCards Shipped (SHIPD CARDS) is a running total of the number of cards shipped to your school through the term
2. MetroCards Assigned (ASSIGN CARDS) is a tally of student records with transportation status **AP**: a MetroCard serial number is assigned on the student's record
3. Deactivated (DEACT CARDS) is a tally of the number of cards deactivated through the term
4. Requested but not Assigned (ASSIGN 5555) is a tally of student records with transportation status **AT**: a MetroCard has been requested, but not assigned
5. Cards Available (UNASSIGN CARDS) displays the result of a calculation: the total number of cards shipped, minus assigned cards, deactivated cards, and requested cards. This represents the number of cards available.

Follow these steps to determine how many cards to request:

1. Determine what is needed
2. Determine what you have
3. Order the difference

#### What is needed?

Multiply the number assigned by .1 to determine the 10% cushion

#### What do you have?

Calculate the difference between Assign 5555 and Unassigned

#### Order the difference

Order by Quantity and type

Using the screen shot below as an example:

**E1 MetroCards:**

What is needed?  
 $320 \times .1 = 32$ : 32 total cards are required  
 What do you have?  
 $5 + 8 = 13$   
 Order the difference  
 $32 - 13 = 19$  E1 cards

**H1 MetroCards**

What is needed?  
 $210 \times .1 = 21$ : 21 total cards are required  
 What do you have?  
 $10 + -1 = 9$   
 Order the difference  
 $21 - 9 = 12$  H1 cards

PROFILE 14-K-123 TRAN 1012 ==> ==		New York City Public Schools Metrocard Inventory Statistics				DATE AND TIME USERNAME
FALL METROCARD CARD INVENTORY FOR ALL SITES						
PASS TYPE		SHIPD CARDS	ASSIGN CARDS	DEACT CARDS	ASSIGN 5555	UNASSIGN CARDS
ELEM	- FULL FARE E1	355	320	22	5	8
ELEM	- FULL FARE FOUR TRIP E3	0	0	0	0	0
ELEM	- FULL FARE SPECIAL ED. E5	25	18	0	0	7
ELEM	- FULL FARE SPEC ED. FOUR TRIP E6	0	0	0	0	0
HIGH	- FULL FARE H1	225	210	6	10	-1

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

1. Include your school's ATS code **and** OPT code in the subject line
2. List the type of card and the quantity needed
3. Include contact information

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

OPT will use data collected in mid-December through ATS to determine spring MetroCard shipments. A card will be sent for each student who has **AP** status displayed on the TLST screen, plus an additional amount for initial replacements. 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 (TRAN STAT) 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. Verify current eligibility on the TLST prior to distribution. If cards are distributed in advance of the spring term, remind students they will not work in subway turnstiles or on the bus until the activation date.

Shipments will start to arrive in mid-January, and may arrive in multiple packages. Please remember to sort MetroCards by type to reduce issues when distributing your cards.

**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.

## Requesting, assigning, and deactivating MetroCards using ATS

### Request and assign a MetroCard in ATS

From the **TLST** screen

1. Find the student name on TLST
2. Verify eligibility: ensure the correct type of card will be distributed
3. Check TRAN STAT in far right column: If blank, enter a **T** in the **ACT CDE** column to the left of the student name and press enter: **AT** will appear in the TRAN STAT column
4. Enter a **U** in the ACT CDE column next to the student name and press enter: the student record (TUTD) will display
5. In the MetroCard number field, enter the serial number from the back of the MetroCard over the 555555 displayed
6. Press the **F2/Save** button **twice** to save: You will be directed back to the TLST screen and the student will have **AP** status in the TRAN STAT column

### Deactivate and Assign Replacement MetroCard in ATS

From the **TLST** screen

1. Find the student name on TLST
2. Enter a **U** in the ACT CDE column next to the student name and press enter: the student record (TUTD) will display
3. In the MetroCard number field, enter the serial number from the back of the replacement MetroCard directly over the serial number displayed
4. Press **F5/Deactivate**
5. Enter the deactivation code **AL**
6. Press **F5/Deactivate** twice to confirm and save: You will be directed back to the TLST screen and the student will have **AP** status in the TRAN STAT column

### Deactivate a student MetroCard in ATS

From the **TLST** screen

1. Find the student name on TLST
2. Enter a **U** in the ACT CDE column next to the student name and press enter: the student record (TUTD) will display
3. Press **F5/Deactivate**
4. Enter the deactivation code **AL**
5. Press the **F5/Deactivate** button **twice** to save: You will be directed back to the TLST screen and the student will have no status in the TRAN STAT column