

## MetroCard Practices and Procedures For Non Public Schools using NPSIS

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 and spring shipments
3. How to request additional or replacement MetroCards
4. Steps for managing the transition from fall to spring MetroCards
5. Setting Transportation and Deactivating MetroCards in NPSIS

### **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 NPSIS:

1. Distribute MetroCards based on a student's current eligibility displayed on the **Ridership Report** in NPSIS. This critical step will reduce the possibility of providing the wrong type of MetroCard to a student, which will adversely inventory.
2. Record the serial number of the MetroCard provided on a paper copy of the Ridership Report in NPSIS. Tracking the serial number is critical if the card is lost and needs to be deactivated.
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 based on how schools "set transportation" for each student in NPSIS. A card is sent for each student that has their transportation set to receive a MetroCard (three-trip GE or SE) in NPSIS. Cards are shipped to schools in late August for the fall term and mid-January for the spring term, as well as replacement shipments as needed throughout the term. OPT will post specific deadlines and key dates on the NPSIS home page.

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

Prior to requesting additional cards, check your MetroCard Inventory by looking at the following in NPSIS:

1. MetroCard Shipment Report – shows total MetroCards by type shipped for a specific school term
2. Deactivated MetroCard Report – shows total number of MetroCards by type deactivated by school staff
3. OPT Transportation Ridership Summary Report displayed at bottom of Ridership report – identifies the number of MetroCards by type required by the school based on how a student's transportation was set

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.

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

*Example:*

E1 MetroCards

Shipped 250

Required 195

Deactivated 45

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

School could request 15 cards for future replacements

Request additional MetroCards directly through OPT using the following email address:

[non-publicschoolmetrocards@schools.nyc.gov](mailto:non-publicschoolmetrocards@schools.nyc.gov)

Please use the following guidelines when submitting your request

1. Include the school's OPT code in the subject line  
*Ex: 26712 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, NPSIS will be updated to reflect shipments of spring MetroCards. Print a fresh copy of the Ridership report to log serial numbers of spring MetroCards distributed to students. When distributing spring MetroCards, remind students they will not work in subway turnstiles or on the bus until the activation date.

### **Setting Transportation and Deactivating MetroCards in NPSIS**

#### **Set Transportation in NPSIS for a student requesting a MetroCard**

From the NPSIS home page

- Click Search and enter the last name (or partial name) of the student
- Click on the student name when it appears on the screen
- Verify that the address has been validated. If not, validate the address and click **Save Student Data** before proceeding
- Click the **Set Transportation** button at the bottom of the screen
- Click the **Edit** button to make changes
- In the **Transportation Change Request** drop down box select MetroCard 3-Trip
- Select **Yes** or **No** for Special Education in the box below
- Click the **Save Changes** button: A message that "Your Transportation Request has Been Received" will display on the message screen
- The next day, the student will appear on the Ridership Report with eligibility displayed and you may provide a MetroCard
- Manually record the serial number of the card assigned on the Ridership Report

### Deactivate a student MetroCard in NPSIS

From the NPSIS home page

- Click the **Transportation** link to display the drop-down menu
- Select **Negative List/Deactivate MetroCards**
- Complete Contact Information Fields
- Enter the serial number of the card: You may enter multiple serial numbers: enter a serial number then press add to list>>; enter next serial number
- Click **Confirm the Negative Listing/Deactivation**
- Assign student a new MetroCard from inventory and record the serial number manually on the Ridership Report