



**FIELD TRIP AND TRANSPORTATION
2022-2023
REQUEST MANUAL**



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TRANSPORTATION AND FIELD TRIP MANUAL

INTRODUCTION

This manual is a reference document for bookkeepers, principals, regional superintendents, regional coordinators, and department heads on how requests for transportation are initiated, planned, paid, and trips conducted.

All trips are paid at a rate of \$25.00 per hour and \$1.50 per mile (In the new Trip Tracker software, there will also be a \$25.00 miscellaneous charge to cover any additional travel that the driver incurs from picking up/dropping off their vehicle). The document is divided into three sections, depending on the type of transportation trip being requested:

Field Trips: Are one-day, one-time trips from the school to a destination, such as Fernbank, museums, or other learning destinations. All field trips are to be paid by the schools. Transportation does not third-party bill. Examples are trips to Fernbank Science Center, Zoo Atlanta, Center for Puppetry Arts, etc.

After School-Paid Activities: Planned in advance one-time or recurring trips during school or after school. These include tutorials, Cool Girls, Latin American Association, student spectator buses, athletic scrimmages, etc.

Pre-Approved Activities: Programs that are sponsored by District-level departments require bus transportation. These activities could be before, during, or after school, as well as on weekends. These are athletics, cheerleaders, band, Science tools and technology (STT), community-based instruction (CBI) for special needs students, community-based vocational tech (CBVT) at job sites, etc.

This manual may be updated on a frequent basis for the 2022-2023 School Year. Please check the following web page to ensure you are reviewing the latest manual:

<http://www.dekalbschoolsga.org/transportation/field-trips>



TRANSPORTATION AND FIELD TRIP MANUAL

Transportation Field Trip Protocol

Category: Transportation Field Trips

Title: Standard Operating Procedure (SOP) for Transportation Services Requests

Applicability: School Bus Drivers, Bus Monitors, Assistant Transportation Supervisors, Transportation Supervisors, Transportation Managers, Bookkeepers, Principals, Regional Superintendents

Legal Review REQUIRED: Yes

COO Review REQUIRED: Yes

Responsible Department: Transportation

PURPOSE: The purpose of this protocol is to ensure that all transportation service requests are processed in an efficient manner and all funds associated with providing these services are collected in a timely fashion.

Requester/School will:

- Enter Field Trip Transportation Request via TripTracker with attached supporting documentation 30 days prior to the date of the event
- Enter Students' names, ID numbers, and addresses on an Excel spreadsheet and attach them for all activities and tutorial requests only

Principal will:

- Review automated email of Field Trip Transportation request generated by TripTracker
- Process approval or denial of Field Trip Transportation request
- If denied, Principal must communicate denial to Requestor

Regional Superintendent will:

- Review automated email of the approved Field Trip Transportation request generated by TripTracker
- Deny field trip request or provide 2nd level approval for Field Trip Transportation request
- A TripTracker automated approval or denial email notification is sent to the principal



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Routing Department will:

- Review TripTracker Tutorial and Activity Report
- Review student spreadsheet(s), Create route(s) for tutorial and activities and e-mail route (s) to Transportation Supervisor

Transportation Supervisor will:

- Generate TripTracker Field Trip Report 2x/day
 - Morning: Between 7:00am- 10:00am
 - Afternoon: Between 2:00pm-5:00pm
- Secure and assign driver(s) via a dropdown list in TripTracker

TripTracker Automation will:

- Email confirmation to requestor

Transportation Supervisor will:

- Print trip requisition and deliver to driver(s) no later than 2-5 days before the scheduled trip

Bus Driver/Bus Monitor will:

- Submit trip requisition for signature on the day of the event
- Submit signed trip requisition to Transportation Supervisor with corresponding weekly timesheets

The Transportation Supervisor will:

- Review and submit the trip requisition to their designated Regional Transportation Specialist to process payment following the trip

Regional Specialist will:

- Enter Driver's Report into TripTracker
- Once the driver's information is entered into the Field Trip system, TripTracker will send a systematic invoice to the requestor

Requester will:

- The school will enter check # and check amount in field trip system, TripTracker
- Remit payment to the Finance Department with a copy of the invoice attached
- Make all checks payable to DeKalb County School District

Note: The Transportation Department will not process a transportation request if it has not been formally approved in the TripTracker System by the Regional Superintendent.



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FREQUENTLY ASKED QUESTIONS

Can you check and see if I have a field trip scheduled?

The Field Trip Liaison at your school has access to look in the Trip Tracker System for this information.

How many students can ride on a bus?

Elementary 72 (with 3 per seat) Middle 48 High 48 (Leave room for Chaperones)

How can I check if a field trip has been approved by the regional office?

The Field Trip Liaison at your school has access to TripTracker and can review the status tab under Find a Field Trip

How much will a trip to the zoo cost for two buses?

Please see page 3 of this handbook to calculate the cost of a trip to any location.

When entering a request into TripTracker, I do not see the destination. How do I add it?

First you must try to search for the destination by checking the spelling and dropping or adding words (ex. Kennesaw College is Kennesaw State University in TripTracker). If this does not work, please email the Transportation Specialist.

Who is responsible for cleaning the bus if a mess is left on it from a field trip?

It is the school's responsibility to clean if the bus is left in a mess. Teachers/Chaperones must make sure that the bus is clean before exiting the bus.

What forms are required before taking a field trip?

Permission forms and emergency cards must be completed for all students riding the bus. A copy of the permission forms and emergency cards must be kept in the front office of the local school. All trips or routes should comply with state standard rule 160-5-1-.12F (Student Fees and Charges/Required Student Equipment and Materials).

Is a meal stop permissible?

Meal stop request and location must be in TripTracker field trip request comment section.



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TRIP TRACKER DEFINITIONS

Athletics: Select this option if your site/school is attending an athletics event and it is being paid by the athletics

Fernbank Science Center: Select this option if your site/school is a trip to FSC.

Fernbank Science Center – SN: Select this option if your site/school is a trip to FSC and you need a special needs bus

Field Trip: Select this option if the event is being paid by another department. However, the invoice will be sent to the requester at your site/school. Once received you will need to submit the invoice to the paying department

Private Carrier: Select this option if you are choosing an “approved” private carrier “outside” of DeKalb County School Transportation Department

School To Pay: Select this option if this is a regular field trip for your site/school and the school is responsible for payment (ex. - trip to zoo, aquarium, etc.)

Special Needs: Select this option if this is a special need event- such as, CBI, CBVT, Special Olympics, etc.

Special Needs Field Trip: Select this option if you have special needs students at your site/school, and they are attending a regular field trip, (ex. -trip to the aquarium, zoo, etc.).

Tutorial STP (school to pay): Select this option if your site/school is having a tutorial; however, your school or third party is paying for the tutorial. Note: we do not create 3rd party receipts/invoices. The site/school will be responsible for ensuring the 3rd party receives an invoice.

Tutorial STP (school to pay) – SN (special needs): Select this option if your site/school is having a tutorial, however, your school or third party is paying for the tutorial - but you need a bus to transport special need students participating in this tutorial. Note: we do not create 3rd party receipts/invoices. The site/school will be responsible for ensuring the 3rd party receives an invoice.

Tutorial Title 1: Select this option if your site/school is having a tutorial; but it is being paid by the title 1 department.

Tutorial Title 1 – SN: Select this option if your site/school is having a tutorial; but it is being paid by the Title 1 department – and you need a special needs bus.

Tutorial Title 1 – Parents: Select this option if your site/school is having a tutorial; but it is being paid by the Title 1 department - and it has been identified as parent outreach event (this information will be given to you by the Title 1 department, if not, do not select this option).

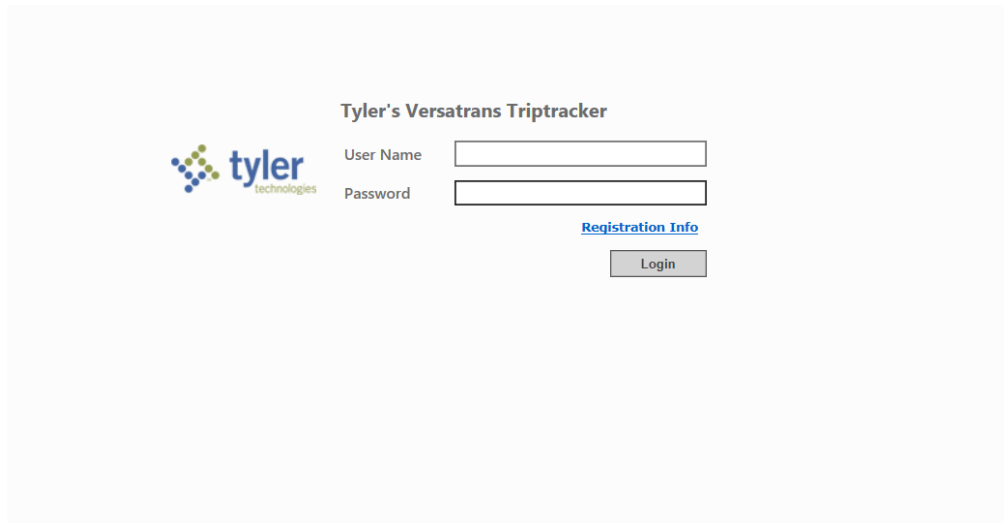
TRIPTRACKER TRIP REQUEST PROCESS

Log in to TripTracker:


TripTracker Today is the home screen and the following sections are visible:

Trip Requests Summary

System Messages



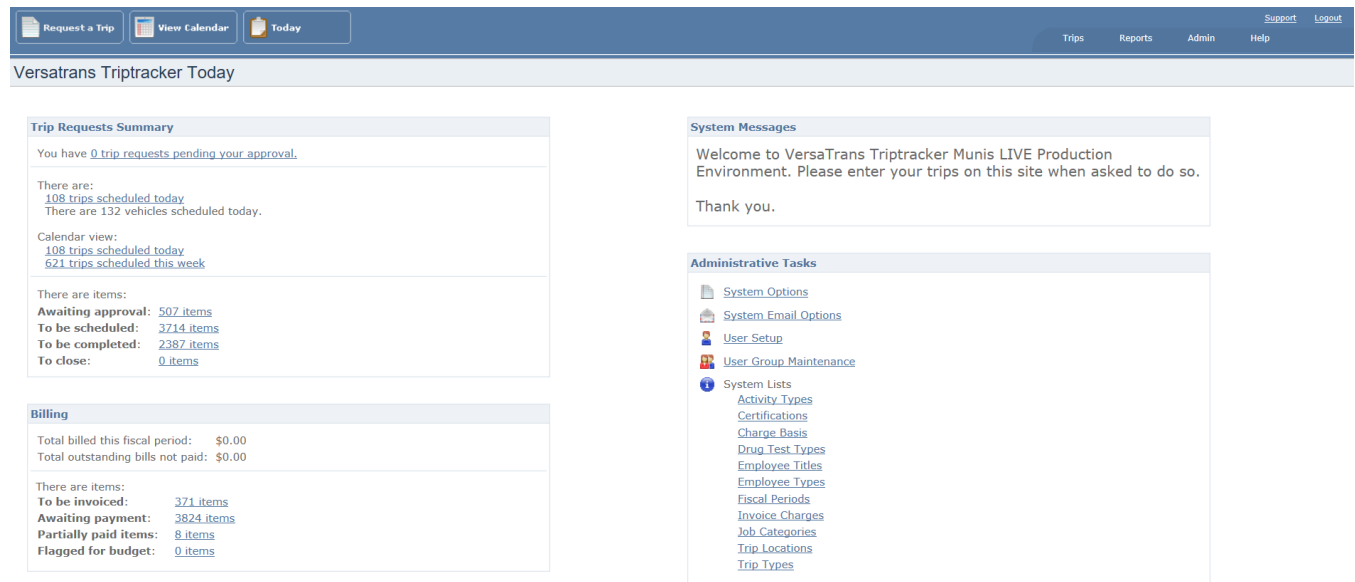
Tyler's Versatrans Triptracker

 Tyler technologies

User Name

Password

[Registration Info](#)



Request a Trip | View Calendar | Today

Support | Logout

Trips | Reports | Admin | Help

Versatrans Triptracker Today

Trip Requests Summary

You have [0 trip requests pending your approval](#).

There are:
[108 trips scheduled today](#)
 There are 132 vehicles scheduled today.

Calendar view:
[108 trips scheduled today](#)
[621 trips scheduled this week](#)

There are items:
Awaiting approval: [507 items](#)
To be scheduled: [3714 items](#)
To be completed: [2387 items](#)
To close: [0 items](#)

System Messages

Welcome to VersaTrans Triptracker Munis LIVE Production Environment. Please enter your trips on this site when asked to do so.






Thank you.

Billing

Total billed this fiscal period: \$0.00
 Total outstanding bills not paid: \$0.00

There are items:
To be invoiced: [371 items](#)
Awaiting payment: [3824 items](#)
Partially paid items: [8 items](#)
Flagged for budget: [0 items](#)

Administrative Tasks

-  [System Options](#)
-  [System Email Options](#)
-  [User Setup](#)
-  [User Group Maintenance](#)
-  System Lists
 - [Activity Types](#)
 - [Certifications](#)
 - [Charge Basis](#)
 - [Drug Test Types](#)
 - [Employee Titles](#)
 - [Employee Types](#)
 - [Fiscal Periods](#)
 - [Invoice Charges](#)
 - [Job Categories](#)
 - [Trip Locations](#)
 - [Trip Types](#)

To request a Trip – Click the button that says > **Request a Trip*** or use the calendar view and double click on the day



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[Trip Details](#) | [Trip Estimate](#) | [Directions](#) | [Scheduling](#) | [Completion](#) | [Invoicing](#) | [Payment](#) | [Trip History](#) | [Attachments \(0\)](#)

Trip Details

If using a Private Carrier, please specify the Carrier name in the Custom Field below. Failure to do so may result in this trip being rejected and/or cancelled.

Trip Name:	<input type="text" value="Omega Psi Phi Fraternity"/>	Trip Date:	<input type="text" value="04/22/2020"/>
Trip Type:	<input type="text" value="Field Trip"/>	Activity Type:	<input type="text" value="Home"/>
Reason for Trip:	<input type="text" value="2020 History Tour"/>		
Account:	<input type="text" value="Redan HS - Field Trips"/>		
Requester:	<input type="text" value="DaCosta, Tijon"/>	<input checked="" type="checkbox"/> Expand Requester List	
Account Notes:	<input type="text"/>		
PO Number:	<input type="text"/>		
Origin:	<input type="text" value="Redan High School"/>	<input type="checkbox"/> One-Way Trip	
Departure Date:	<input type="text" value="04/22/2020"/>	Departure Time:	<input type="text" value="09:11 AM"/>
Return Date:	<input type="text" value="04/22/2020"/>	Return Time:	<input type="text" value="11:17 AM"/>

- Fill in Trip Information – note the status is currently Un-submitted
- Trip Name – **REQUIRED** – follow a naming convention that will allow you to easily find a trip if necessary, or the instructions provided by transportation
- Trip Date – **REQUIRED** – type or use the drop down – REMINDER – MUST BE 30 DAYS IN ADVANCE OF THE TRIP DATE OR THE TRIP REQUEST WILL NOT GO THROUGH
- Failure to submit in a timely manner may result in the trip being rejected
- Trip Type –**REQUIRED** – Use drop down – scroll through list or type first letter
- Activity Type –**REQUIRED** – Use drop down – scroll or type first letter
- Reason for Trip –**REQUIRED** - for additional information i.e., Standard being met
- Requester – **REQUIRED** - name will fill in automatically, or will be in dropdown list
- Choose the Account – **REQUIRED** – this is the entity financially responsible for the trip
- Account note will fill in once account has been chosen or will be blank – no data entry in this field
- PO Number – Optional
- Origin Information– **REQUIRED** – click drop down and type first letter(s) to position the list
- Departure date – **REQUIRED** – will fill in from trip date above
- Departure time – **REQUIRED** – enter time and A or P for AM/PM – all trip times must be within District time threshold. All times default to AM, you must enter a P for PM times.
- Return Date -**REQUIRED** - will fill in from trip date above. If this is a multi-day trip, use the dropdown to select return date



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- Return time – **REQUIRED** – enter time and A or P for AM/PM (it will always default to AM)

Destinations:

Destination: Can't find your destination in the list?
[Click here to add a new location...](#)

Arrival: Date: Time: *

Departure: Date: Time: *

Click "Add" to add the select location to the list of destinations for this trip.

Destination	Arrival Date/Time	Departure Date/Time		
Omega Psi Phi Fraternity	4/22/2020 9:11 AM	4/22/2020 11:17 AM	Remove	Edit

- **Destination** Information – **REQUIRED** – use drop down to see list of available trip destinations – can type first few letters to jump to that location in the list
- If your destination is not there, you may click Add a New Location – but please check the list carefully before adding a new location. It may be that the destination you want is in the list with a slightly different name.
- Arrival Date – **REQUIRED** - will be filled in from above. If this is a multi-day trip, use the dropdown to select return date if needed
- Arrival Time – **REQUIRED** – estimate the time of arrival at your destination (this time must be later than your departure time above – to allow for travel time)
- Departure Date – **REQUIRED** - will be filled in from above. If this is a multi-day trip, use dropdown to select return date if needed
- Departure Time – **REQUIRED** – estimate the time of departure (this time must be earlier than your return time above – to allow for travel time)
- Click **ADD** to add this destination to your trip – you will know a destination has been added because it will be in Blue
 - You can follow the above steps to add multiple destinations on this trip. Remember that the times for each Destination must make logical sense, you cannot arrive at one destination earlier than you left the previous one, etc.



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Adults	Students	Wheelchairs	Vehicles	<input type="checkbox"/> Special Accommodations
Number Of: <input style="width: 50px;" type="text" value="2"/>	<input style="width: 50px;" type="text" value="22"/>	<input style="width: 50px;" type="text" value="0"/>	<input style="width: 50px;" type="text" value="1"/>	
Contact Name: <input style="width: 150px;" type="text"/>	Contact Phone: <input style="width: 150px;" type="text"/>			
Notes:	<div style="border: 1px solid black; height: 60px;"></div>			
Meal Stop	<input style="width: 100%;" type="text" value="NO"/>			
Wait	<input style="width: 100%;" type="text" value="YES"/>			
WheelChair Lift Bus	<input style="width: 100%;" type="text" value="NO"/>			
Private Carrier Name	<input style="width: 100%;" type="text" value="NO"/>			

- Passenger Information –**REQUIRED** - number of Adults, Students, Wheelchairs, Vehicles and/or Special Accommodations. Vehicles defaults to 1
- Contact name and phone number – **REQUIRED**- this can be the trip sponsor or teacher
- Notes – Optional – can be filled in to give additional details about the trip
- Meal Stop – **REQUIRED** – either Yes or No
- Wait – **REQUIRED** – either Yes or No
- Wheelchair Lift Bus – **REQUIRED** – either Yes or No
- Passenger Information –**REQUIRED** - number of Adults, Students, Wheelchairs, Vehicles and/or Special Accommodations. Vehicles defaults to 1
- Contact name and phone number – **REQUIRED**- this can be the trip sponsor or teacher
- Notes – Optional – can be filled in to give additional details about the trip
- Meal Stop – **REQUIRED** – either Yes or No
- Wait – **REQUIRED** – either Yes or No
- Wheelchair Lift Bus – **REQUIRED** – either Yes or No
- Private Carrier Name – **REQUIRED** – No if not using otherwise enter carrier name if Private Carrier Account was chosen
- Click on Trip Estimate



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TripTracker Trip Estimate

When integrating with MUNIS, completing this step *is necessary* and is used to ensure an accurate encumbrance on trips that have a cost associated. Failure to complete this step may result in the trip being rejected or cancelled.

Click the Trip Estimate link at the top of the Trip Request screen. Notice that the estimate is based on the number of vehicles requested and does not contain an entry for mileage.

[Trip Details](#) | [Trip Estimate](#) | [Directions](#) | [Scheduling](#) | [Completion](#) | [Invoicing](#) | [Payment](#) | [Trip History](#) | [Attachments \(0\)](#)

The cost of a trip can be estimated by entering the total round-trip mileage and entering any other Estimated Expenses. Click Calculate to see the estimate based on the information entered. You can click Save Estimate, and this estimate will be saved with this trip. If you make changes to this estimate, say change the total number of miles, click Calculate again and save this new estimate. The most recently saved estimate is associated with this trip.

Alternately, and the easier way to get an accurate mileage estimate, you can use the Open Trip Directions/Mapping Tool link and have a map and turn by turn directions generated directly from Bing Maps. You can then use this mileage as a basis for your Trip Estimate.

Note: This is one-way mileage unless the check box for Include Return to Origin is checked.

Note: If you Open Trip Directions/Mapping Tool and nothing happens, you may have a pop-up blocked. Check your top tool bar and if needed, choose to always allow popups from **TripTracker**.

Note: If you click the Calculate Directions and nothing shows in the map window or turn by turn, check your tool bar. It may be that Bing has been blocked. If using Chrome, look for the icon in the tool bar and click it. Choose Load Unsafe Scripts then click the Trip Directions/Mapping Tool link again. This will now allow Bing maps to load the map and turn by turn.

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Point-to-Point Driving Directions

[Print](#) | [Close](#)

Use this tool to estimate trip distances, and to assist in determining point-to-point directions.

Origin

Location: Address:

Destinations

Location:
Address:

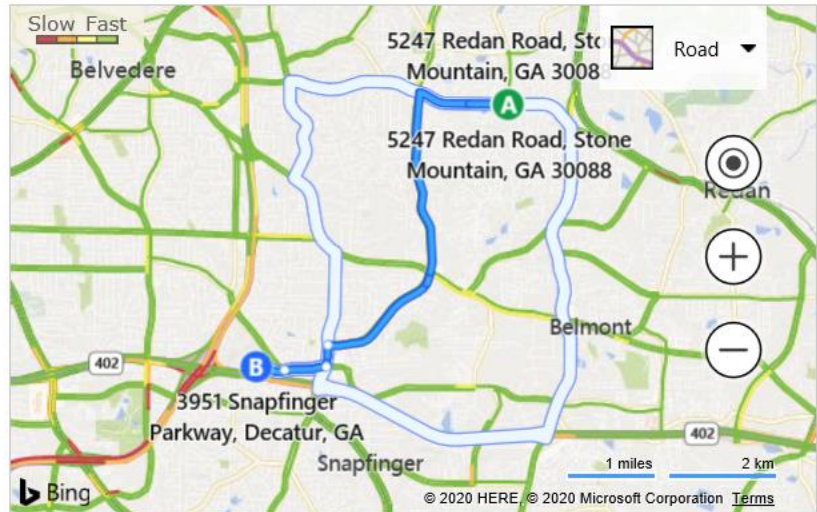
Include return to origin

Destinations	Address
Omega Psi Phi Fraternity	3951 Snapfinger Parkway, Decatur, GA remove

[Clear All Destinations](#)

Trip Distance: 11.9

29 min	Light traffic · 5 min delay Via Redan Rd, S Hairston Rd · <i>Lo roads</i>
35 min	Moderate traffic · 8 min delay Via Redan Rd, S Indian Creek Dr · <i>Local roads</i>
42 min	Heavy traffic · 15 min delay Via Panola Rd, I-20 W



- After clicking Calculate Directions, click the button on the bottom to “Use estimated distance for this trip”
- The distance calculated is for only one vehicle. If you have requested more, multiply this distance by the number of vehicles and change the mileage in the estimate screen
- Click OK to the confirmation then click Close

Back on the Trip Estimate Screen, you will note that the total round-trip mileage has been entered in the field. The system now needs to calculate the estimate based on this new information and add the cost of the mileage to the estimate.

Destination Calculations:

Distance Rate: Distance:
Charge Over Miles:

FIELD TRIPS REQUEST

Approval Requirements

The Principals and Regional Superintendents must electronically approve all field trips in **TripTracker**. They are to monitor the number and nature of the field trip requests and work with teachers to determine the appropriateness and educational value of the requests. Every effort should be made to limit the number of trips from his/her school. Field trips should support the instructional programs of the DeKalb County School District.

Field trips will not be approved if the time conflicts with the regular student transportation program. DeKalb County School District buses may be used for trips that are 75 miles or shorter. Trips longer than 75 miles must be arranged by the school with a private carrier (the list of approved private carriers can be located DCSD website- <http://www.dekalbschoolsga.org/transportation/field-trips>).

Principals should review each field trip request for accuracy. In order to check on any trip, the requisition number(s) will be required.

If needed for special needs students, lift buses must always be specified in the school notes on the requisition in **TripTracker** and an email must be sent to your Transportation Specialist.

Field Trip Availability

- Transportation is available, space limited, for field trips for the following days and times:
- First Day of Field Trips is October 1, 2022
- Last Day for Field Trips is two weeks prior to the last day of school (May24, 2023)
- School days: 9:45 AM – 12:45 AM for lift buses, 9:00 AM – 1:30 PM for all other buses
- Distance from the school to the destination is limited by the time constraints above.
- Weekend field trips are allowed during the date ranges above.

Request and Payment Timeline

1. All requests must be submitted via **TripTracker** at least 30 (to the date/time) calendar days prior to the trip date.
2. Transportation Department will provide a cost estimate for pre-paid trips before October 1, 2022, and after April 15, 2023. (17 calendar days prior to the trip date)
3. Regional Superintendent approval is due 14 calendar days prior to the trip date.
4. If a trip is to be cancelled by the school, the Transportation/Business Services Department must receive notice of cancellation by email (to your Transportation Supervisor and Regional Specialist) no later than three days prior to the trip.



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5. For all field trips, all schools will receive a monthly invoice. Payment is due no later than three (3) days after the invoice date. If payment from prior field trips or activity routes is still outstanding at the time of submitting requests for a future field trip in **TripTracker**, the field trip request will be rejected in **TripTracker** until such payment is received.
6. Schools are responsible for parking fees or fueling costs for regular trips, extended stay or overnight trips, if needed.

Day of Field Trip

All non-DeKalb County students are prohibited from riding on the bus. Parents who are chaperones are authorized to accompany students on the school bus. The chaperone-student ratio is 5:1 for pre-kindergarten trips and 10:1 for all other ages. This ratio does not apply to trips to Fernbank Science Center. For trips to Fernbank Science Center, the classroom teacher must accompany the students on the trip. If the classroom teacher is absent, the principal must provide a certified teacher.

Permission forms and emergency cards must be completed for all students attending field trips. Certified personnel must carry emergency cards during a field trip. A copy of the emergency card must also be left in the front office of the local school.

Lunch must be at school or at the field trip location. Eating or drinking on a bus is never permitted.

Schools must call their Transportation Specialist in the Transportation /Business Services Department if the bus has not arrived 5 minutes before the scheduled departure time. Do not wait until 15 or 20 minutes after your departure time to call.

All trips should comply with state standard rule 160-5-1-.12F (Student Fees and Charges/Required Student Equipment and Materials)



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SCHOOL-REQUESTED ACTIVITY

Approval Requirements

The Principal and Regional Superintendent must approve all school-requested activity routes/trips. DeKalb County School District buses may be used for trips that are 75 miles or shorter. Trips longer than 75 miles must be arranged by the school with a private carrier (see section on Non-DCSD Transportation).

If needed for special needs students, lift buses must always be specified on TripTracker.

Request and Payment Timeline

1. All requests must be submitted via **TripTracker** at least 30 calendar days prior to the activity/route start date.
2. The Regional Superintendent approval is due 14 calendar days prior to the trip date or first activity date.
3. If a trip is to be cancelled by the school, the Transportation/Business Services Department must receive notice of cancellation by email (to your Regional Specialist and Transportation Supervisor) no later than three days prior to the trip.
4. For Title I activities, payment is not due until after services are provided (i.e., no pre-payment).
5. For field activities funded by After School and Extended Day Program (ASEDP) funds, an email from the ASEDP Office must be received by the Billing Department no later than 14 days prior to the trip. The email shall indicate the amount that can be covered and express approval by the ASEDP staff to use such funds. If email is received in a timely manner, then no pre-payment is needed.
6. Schools are responsible for parking fees or fueling costs for regular trips, extended stay or overnight trips, if needed.
7. All trips should comply with state standard rule 160-5-1-12F (Student Fees and Charges/Required Student Equipment and Materials).



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PRE-APPROVED ACTIVITIES

Prior sections of the trip request manual are geared towards trips and routes that are requested by and paid by the individual schools. This section focuses on the trips paid by District-level departments. A budget-owner for a program will coordinate with the Transportation/Business Services Department in the summer prior to the school year to list out all pre-approved trips as well as work with the Finance Department in the spring prior to the school year to ensure adequate funds are available.

For example, the Athletics Executive Director would develop a list of “pre-approved” trips that would be paid by the District-level Athletics Account. The Athletics Executive Director is the “budget-owner” and will pre-approve the trips to fit within their budget. Similarly, this would be done for Band, CBI, CBVT, Alternative School, etc.

Approval Requirements

The budget-owner for the program shall send in a list of all “pre-approved” trips for all school-requested activity routes/trips within their budgeted amounts well before the first trip is submitted in **TripTracker**. The Business Services Department will use their GUI account code to verify payment of the trips.

DeKalb County School District buses may be used for trips that are 75 miles or shorter. Trips longer than 75 miles must be arranged by the school with a private carrier (see section on Non-DCSD Transportation).

If needed for special needs students, lift buses must always be specified in the school notes on the requisition in **TripTracker**.

Request and Payment Timeline

1. While the trip must be on the pre-approved list, **a trip request must be submitted by the school via TripTracker at least 30 calendar days (to the date/time) prior to the activity/route start date.**

The Business Services Team will review the request in **TripTracker** and compare it against the pre-approved list(s).

SCHEDULING THE TRIP

Trip Scheduling - assigning drivers and vehicles

- Users can access trips ready for scheduling by clicking the link on

Triptracker Today > To be scheduled:

There are items:

Awaiting approval: [10 items](#)

To be scheduled: [7 items](#)

To be completed: [138 items](#)

To close: [0 items](#)

- Review Trip Details for times and destination(s)
- If additional details need to be provided to driver, use the Directions tab and enter desired text. Also, if desired, the Bing map and turn-by-turn directions may also be attached to the trip at this time by clicking **Open Trip Directions/Mapping Tool** link and click Calculate Directions and click Attach directions to this Trip.

Review information on Scheduling tab – number of passengers, number of vehicles, special requests (custom notes)

- Leave check box for Filter Drivers by Account blank/unchecked
- Choose Appropriate Pick List from the Drop Down
 - Once Pick List selected, choose Driver from dropdown
 - If vehicle is associated with Driver, it will fill in; if not, user can select any vehicle from dropdown
- Is this a Drop & Return?
 - If yes, click double down arrow, place check mark next to D&R, choose correct Pick List and select 2nd driver and vehicle from dropdowns (can choose original driver as the drop and return driver)

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- If additional vehicles are needed for this trip, click the link to add vehicle/driver. This opens another line where you choose the Pick List, Driver and vehicle
- If this trip requires a Monitor, make the choice in the Monitors/Aides section
- **Entering Driver Refusals**
 - Will not be used for the remainder of the 2018-2019 school year

- **Driver Trip Sheets**

- Driver Trip Sheet not available until Scheduling data is saved



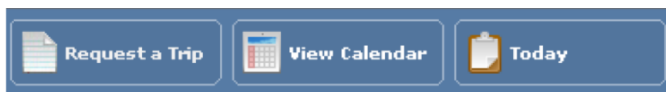
- Print the Driver Trip Sheet with or without Map directly from this screen, if desired and for ease of use



- Otherwise, use the Reports menu to print multiple Driver Trip Sheets (example, all trips for a specific day)

- **Calendar**

- View calendar with hover display of trip details



- Print the daily trip log directly from the calendar using the link on the top of the calendar
 - This is the same as Trip Listing Detail report from the Reports menu
 - The report is produced for the current calendar view (Day/Work Week/Week/Month/Timeline)

TRANSPORTATION AND FIELD TRIP MANUAL

Filter Close Reset



17 – February 23, 2019

Day

Work Week

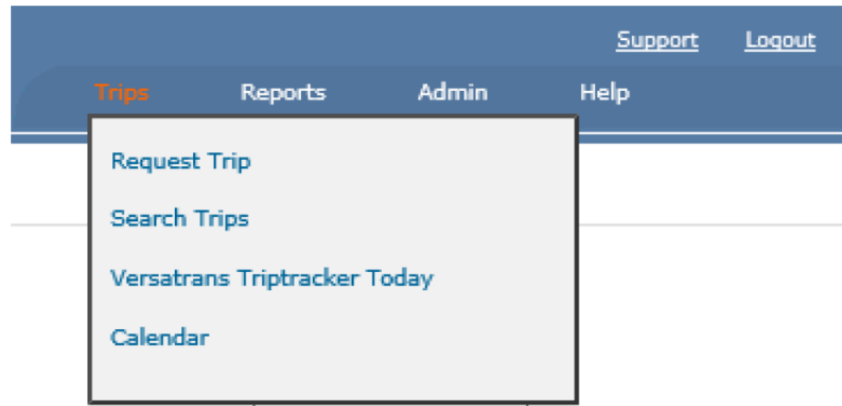
Full Week

Month

Timeline

Agenda

- Trip request screen, to view all trip details, may be accessed directly from the calendar by double clicking on a trip name
- **Search trips**
 - Trips > Search Trips to find a specific trip or a group of trips (same account, etc.)



- The Basic and Advanced filters work independently of each other.
- Advanced Trip Search; remember to click small OK button at bottom to add the search criteria to the criteria line, then click Add to query to create the filter itself.
- **Trip History**
 - Trip History provides overview of trip and users who have worked on trip, and provides the ability to resend emails
- **Attachments**
 - The Attachments tab may contain files for reference - .bmp, .csv, .doc, .docs, .docm, .docx, .dot, .gif, .htm, .html, .jpeg, .jpg, .pdf, .png, .ppt, .pptx, .rtf, .tif, .tiff, .txt, .xls and .xlsx
 - Examples of useful attachments: student roster, detailed itinerary, high level approval if needed for trip, educational needs being addressed on trip, etc.

QUICK REFERENCE FOR APPROVERS

TripTracker Approval Process

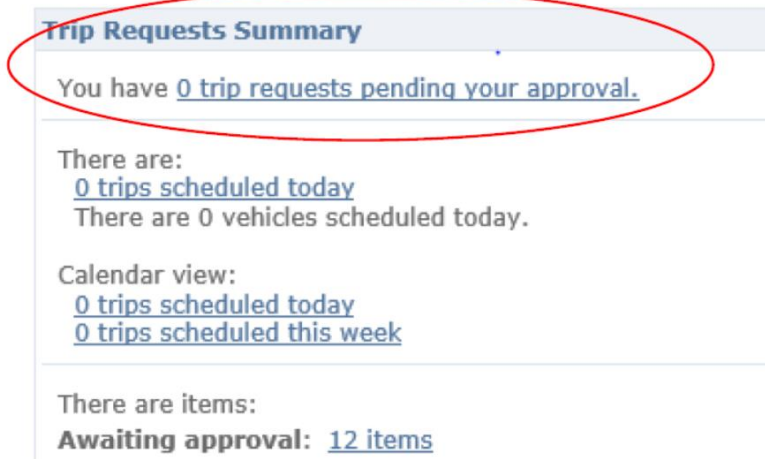
Log in to TripTracker by clicking the link in the email you received – TripTracker Today is the home screen and the following sections are visible:

- Trip Requests Summary
- System Messages

Trip Requests Summary will show the number of trips ready for your approval and may show all other trips ready for approval, regardless of approval level. You should have received e-mail notifications on each of the trips pending your approval.

To Approve a Trip – Click the Trip Requests Summary Link: You have X trip requests pending your approval

Versatrans Triptracker Today



Trip Requests Summary

You have [0 trip requests pending your approval.](#)

There are:
[0 trips scheduled today](#)
There are 0 vehicles scheduled today.

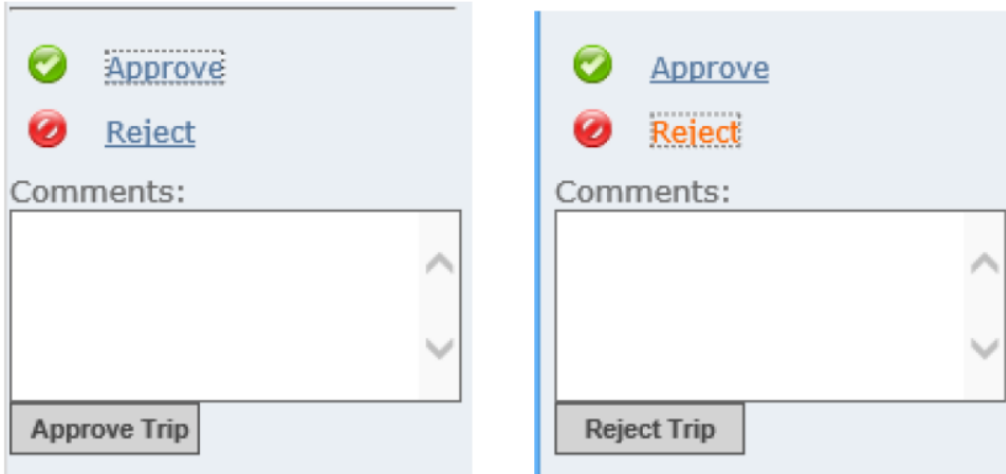
Calendar view:
[0 trips scheduled today](#)
[0 trips scheduled this week](#)

There are items:
Awaiting approval: [12 items](#)

- The Trip Search screen opens with links to trips ready for your approval
- Click on the Trip Name Link – (underlined, blue text) this opens the trip in the Trip Request Screen and shows all information entered for this trip
- You can view the trip estimate if it was saved; you can create/edit the estimate at this time if needed
- Click either the Approve link or the Reject link – depending on the action you wish to take on this trip

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- Once you click Approve or Reject a comments box appears so that you may add comments for an approval, or a reason if you are rejecting the trip



- After the desired information has been entered in the comments box, click the button that says Approve Trip if you chose Approve, or Reject Trip if you chose that option
- The trip status will change to Rejected if that is the action chosen, or may stay at Requested if additional approvers need to approve the trip
- You will receive a green Trip Successfully Approved notice at the top of the screen if the approval completed.

Trip Successfully Approved

- If an error message appears, make note of the message. If it is a Non-sufficient funds notice, this means the MUNIS account being used for this does not have sufficient funds available (based on the trip estimate) If any other error message is received, please contact a system admin (TBD)
- If the trip status indicates Requested, there is another level of approval needed – they will receive an email regarding approving this trip
- If the trip status indicates Approved, it is now ready for scheduling by the Transportation Office
- If the trip is Rejected, the status is changed to Rejected and an email is sent to the Requester so they can review the reason for rejection, fix the problems, and resubmit the trip for approval, or cancel the trip altogether



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- Alternately, if Batch Trip Approval permission has been given, there will be a list of trips to be approved and a check box by each one. The Approver can check the trips to be approved, provide a comment, and select Approve or Reject Trips, or can click on the trip name to see the details of the trip.
- After the final approval has been applied, the funds are encumbered in MUNIS
- For more detailed information on these and other topics, consult the online help or speak with your district Triptracker administrators.



TRANSPORTATION AND FIELD TRIP MANUAL

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