Department of Education
Chancellor Richard A. Carranza

OFFICE OF PUPIL TRANSPORTATION
Alexandra Robinson, M.Ed. CDPT, *Executive Director*
44-36 Vernon Boulevard
Long Island City, NY 11101
Telephone: (718) 392-8855
Fax: (718) 482-3702

Guide for receiving and distributing student MetroCards

NPSIS Users—Non-Public Schools

Contents

Introduction 2

Number and contents of packages you should expect to receive 2

Valid dates, eligible students, and restrictions on use 2

Security and reporting theft of MetroCards 3

Information found on sample MetroCard receipts (attachment A) 3

Reporting errors with your shipment 4

General rules regarding student eligibility for transportation 5

Replacing lost, damaged, or stolen MetroCards 5

Procedures for distribution and assignment of MetroCards 6

Determining the eligibility for your students (Attachment B: NPSIS Ridership Report) 9

Recording serial numbers of MetroCards distributed to students 9

Deactivating and replacing lost, damaged, or stolen MetroCards 9

Where to turn for help 10

Attachments 11

Introduction

Read ALL of the following BEFORE distributing MetroCards

The following instructions have been prepared to assist you in managing MetroCard distribution for your students for the coming semester.

Please read **ALL** of the instructions relevant to your type of school before distributing MetroCards **and** before contacting OPT with regard to any perceived MetroCard problems. The instructions should help you clearly identify, describe, and communicate problems and will assist us in expediting a solution. In addition, the instructions contain important information regarding how to determine which type of MetroCard (half-fare, full-fare, or Special Ed) a student will receive plus what you must do to properly document the distribution of these cards.

> **It is critical that you strictly follow these instructions relating to the eligibility of students for MetroCards and recording the number of each MetroCard provided to each student. These records will be subject to audit by OPT and the NYC Transit Authority.**

Failure to carefully and completely follow these instructions will also jeopardize your ability to quickly receive additional MetroCards during the course of the current term and will have a negative impact on the number of cards you receive for future terms.

Number and contents of packages you should expect to receive

The package you just opened contains MetroCards for distribution to your students for the coming term. The total number and type of MetroCards you receive is based on the number of students who had MetroCards selected as their form of transportation during the last term. To ensure that you receive enough MetroCards to meet the needs at the beginning of the term, we have also included a percentage of additional MetroCards in the shipment for new students and as initial replacements for lost, damaged, or stolen MetroCards.

The particular package you just opened, which may have been a box or yellow envelope, will probably be one of two that you receive for the beginning of the term.

- Elementary schools (K-6) usually receive one package containing both full-fare and Special Education (Hndc) cards; half-fare cards (if any) are in a separate package
- High Schools (7-12) receive their full-fare and half-fare cards in one package, and Special Education cards in another

Given all of the above, the complete shipment that you receive for the start of the term may consist of two packages, possibly delivered to you over several days. Whatever the number of packages, however, the total number of MetroCards is ultimately based on what you have told us, by use of NPSIS, about your needs.

Valid dates, eligible students, and restrictions on use

MetroCards are **not valid for use before their activation date and cannot be used after their expiration date**. You should remind all staff that **cards are to be given to and used only by eligible students who are residents of New York City**, and these cards are **to be used only on days when school is in session**. Anyone apprehended for unauthorized use of a student MetroCard may be prosecuted to the full extent of the law. As you may be aware, the MetroCards shipped to your school are registered to your school by serial number. For this reason a school cannot, under any circumstances, “lend” it’s MetroCards to another school or program within the same school or building that has its own unique OPT code.

Security and reporting theft of MetroCards

You are responsible to take all steps necessary to secure all MetroCards on their arrival at your school. MTA guidelines require that MetroCards that have not been distributed be kept in a locked safe at all times, **not** in filing cabinets, desk drawers, closets, or offices. If MetroCards are stolen from the school please follow these procedures:

1. Report the theft to the police immediately.
2. Deactivate the serial numbers of the stolen cards using the Negative List/Deactivate function in NPSIS.
3. Fax a copy of the police report with the police claim number to the MetroCard Unit of the Office of Pupil Transportation along with a written account of the incident, the serial numbers of the MetroCard or cards that were stolen and, in the event of loss or theft from the school, indicating what security measures will be taken by the school to prevent a future occurrence (fax number 718-482-3881).

Information found on sample MetroCard receipts (Attachment A)

In addition to the MetroCards and these instructions, every package of MetroCards that we ship should contain a "ticket receipt." An example of a ticket receipt will be found attached: Attachment A is a receipt for a non-public high school. The information contained on these examples is described below and is similar to what is found on receipts for elementary and middle schools. Please review the sample receipt so that you understand the data they contain. You will need to be able to communicate this information to OPT to report and correct any problems.

1	**OPT School Code**	This is how we identify your school. The OPT code is what we need to know in your communications with us
2	**School name and address**	
3	**Shipment date and shipment number**	The shipment date is the date when the shipment information was prepared, it is not the actual date the cards were shipped. The shipment number, "1" in the case of these examples, indicates that this is the first shipment to your school for the current school year.
4	**Program code**	The "T" indicates that this is a shipment for a school with a "ten-month" program
5	**Shipment information**	This area of the receipt contains the following information particular to this shipment: a. **Pass Type:** these codes (H1, H2, H3, etc.) are "OPT-speak" for the kinds of MetroCards contained in the shipment. A "plain English" translation of each code will be found below the amount and serial number information on the receipt b. **Pass Period:** more "OPT-speak" indicating that these cards were shipped for the current term c. **Amount:** the number of MetroCards of each type contained in the package d. **Plain English Translation of the Pass type described in "a" above** e. **Serial – From To:** the serial numbers shown here should correspond with the numbers printed on the backs of the MetroCards under the word "Expire" found in this package
6	**Summary Data**	This area of the receipt contains the following information regarding all shipments sent to your school for the term a. **Tot Ship this Pd:** this is the total number of cards, including the current shipment, of the specific type that has been sent to your school during this period b. **Stand Req.:** no longer in use; ignore c. **Pgm Exc:** this area will contain information if the shipment is for Program Exception Cards d. **AMIS Ovr:** no longer in use; ignore e. **OPT100 Elig:** this is the number of eligible students on file. This number should equal the figure shown on the receipt under Amount (5.c, above)

7 **School** This area of the receipt provides space for you to write the following:

a. **Recvd:** write in the number of cards received by type (does it agree with the number shown to the left under "amount"?)
b. **As Of:** write in the date you received and checked the accuracy of the shipment

Before you do anything further, *do exactly what is described in 7, above*: check the accuracy of the contents of this package against the information found on the "ticket receipt" found in the package and write in the number of cards received and the date. *File and keep this receipt*. It *may* be requested by OPT if another school reports an error with their shipment and *will* be requested if your records are audited

Reporting errors with your shipment

If there is **ANY** discrepancy between the information found on the receipt and the contents of the package you receive, contact the MetroCard Unit at OPT **immediately**. Examples of problems or errors that should be reported are:

- The shipment is not intended for your school
- The package does not contain the type of MetroCards or the number of cards shown on the receipt
- The serial numbers on the MetroCards do not match the serial numbers shown on the receipt
- Any other **significant** disparity between the information on the receipt and the contents of the package

If any of these errors have occurred, do two things:

1. Email a brief and specific explanation of what you believe is wrong with the shipment you received
   - Email address: non-publicschoolmetrocards@schools.nyc.gov

   In the email, put the following in the subject line: your OPT code, followed by "MetroCard Error," followed by a brief statement on the nature of the problem. Several examples follow:

   07453 MetroCard Error – Cards do not belong to my school*
   03008 MetroCard Error – Special Ed cards not received
   13721 MetroCard Error – Serial numbers do not match
   *Note; IF the cards were sent to your school in error, use your OPT code when you report this, which will not be the OPT code found on the receipt.
2. Make a notation on the receipt calling attention to the error (for example, circle the school name and write 'Not my School," or circle the Special Ed information and write "Not Received," etc.) and Fax a copy of the receipt to the MetroCard Unit at (718) 482-3881. Do not fax a receipt without an accompanying email: do not send the email without faxing the receipt.

If there have been any errors with the shipment, once these have been straightened out, or once you have determined there are no errors, you should begin to prepare to distribute the MetroCards to students who are eligible for transportation and have requested MetroCards.

General Rules regarding student eligibility for transportation

Student eligibility for transportation is determined by grade and distance and is governed by New York State Law and Chancellor's Regulation A-801. These regulations are explained in detail on the OPT web site: http://www.optnyc.org/ServicesAndEligibility/getransportation.htm

The table below contains a summary of these rules which **must be applied in all cases**.

Grade	Walking Distance from Home to School	Distance Code	Eligibility (MetroCard type)
K-2	Less than ½ mile	A	Half fare (H2)
K-2	½ mile or more	B, C, D	Full fare (E1)
3-6	Less than 1 mile	B	Half fare (H2)
3-6	More than 1 mile	C, D	Full fare (E1)
7-12	Less than 1 ½ miles	B, C	Half fare (H2)
7-12	1 ½ miles or more	D	Full fare (H1)
Special Ed MetroCards (E5 and H5) will be shipped for students who have an active IEP, are not receiving specialized transportation, and who have MetroCard 3-Trip selected in NPSIS.			
You must be aware of the current eligibility of your students prior to distributing cards. Do NOT distribute full fare MetroCards to student who are eligible for half fare transportation. You will not have sufficient cards, will be unable to properly assign these cards, and will compromise your ability to receive replacement cards. OPT cannot provide full fare cards to compensate for this error.			

Replacing lost, damaged, or stolen MetroCards

If a student who has received a MetroCard reports that the cards has been lost, damaged, or stolen, the card they were originally issued must be deactivated (see pp.6 and 11) and a replacement MetroCard should be provided. Replacement MetroCards should be available at the school and should be issued as soon as possible. If replacement MetroCards are not available in inventory, they should be requested promptly from OPT and should be distributed to the student as soon as possible. As a practical matter, no student should have to wait longer that three to five days for a replacement card.

Procedures for distribution and assignment of MetroCards

The following section outlines the procedures to be followed in relation to distributing and assigning MetroCards. It is critical that you follow these instructions and focus on the eligibility of the student, distribution of the correct MetroCard type, and completing the assignment steps for cards provided to all students. Documents and documentation are subject to audit by OPT and the NYC Transit Authority.

To effectively and accurately manage your MetroCard inventory every school will follow the steps

1. Determine the current eligibility for all students that will receive a MetroCard
2. Distribute the cards based on eligibility and record the serial number of the card provided to each individual student
3. Write the serial number of the MetroCard provided on the printed Ridership Report from NPSIS

Determine the current eligibility of your students

Once students attending Non-Public schools have been added to the school roster on NPSIS (address validated and student data saved), their walking distance from home to school will be automatically be calculated and displayed on the Transportation Requests for Multiple Students screen in NPSIS the following day. If you select MetroCard 3-Trip for transportation and save the information, the type of MetroCard they should receive will be displayed in two places: On the Transportation Requests for Multiple Students – Student Assigned Transportation screen; and on the Ridership Report in NPSIS. You will use this information to provide the correct type of MetroCard to each student.

At the beginning of the term, students who had a MetroCard assigned the previous term will be displayed: You will select MetroCard 3-Trip to identify additional students who have requested and will receive MetroCards (for September school opening, these will be incoming students that will use MetroCards).

Distribution of MetroCards to students and the recording of the MetroCard serial number

Print the Ridership report in NPSIS (change page setup to Landscape, Legal). You can use this document as your distribution log. For each student, write the ten-digit serial number in the space provided. An example is shown in the attachments (B).

Deactivation and replacement of lost, damaged, or stolen MetroCards

Attachment C provides detailed instructions on the steps you must take if a student reports that their MetroCard has been lost, damaged, or stolen. It is imperative that the MetroCard be deactivated **immediately** so that it will no longer work in the subway turnstile or bus card reader; you must also replace the card as quickly as possible. For this reason you must maintain your MetroCard inventory to always have an adequate supply of replacement cards, and may never “punish” a student by delaying the replacement of a lost, damaged, or stolen MetroCard. Deactivation of MetroCards has a direct impact on your MetroCard inventory and, in not done or done incorrectly, will affect your ability to receive replacement cards from OPT.

Where to turn for help

As described above (pp.4), problems with your shipment should be reported immediately by email to OPT. For additional assistance and help with any other issues or ATS procedures described in this document you can contact your Account Manager at OPT.

If you feel you need more extensive support, training, or technical assistance you may contact the OPT Training team; additional information about managing MetroCards is at OPT Info Stop.

You may also contact OPT Customer Service at 718-392-8855

Attachments

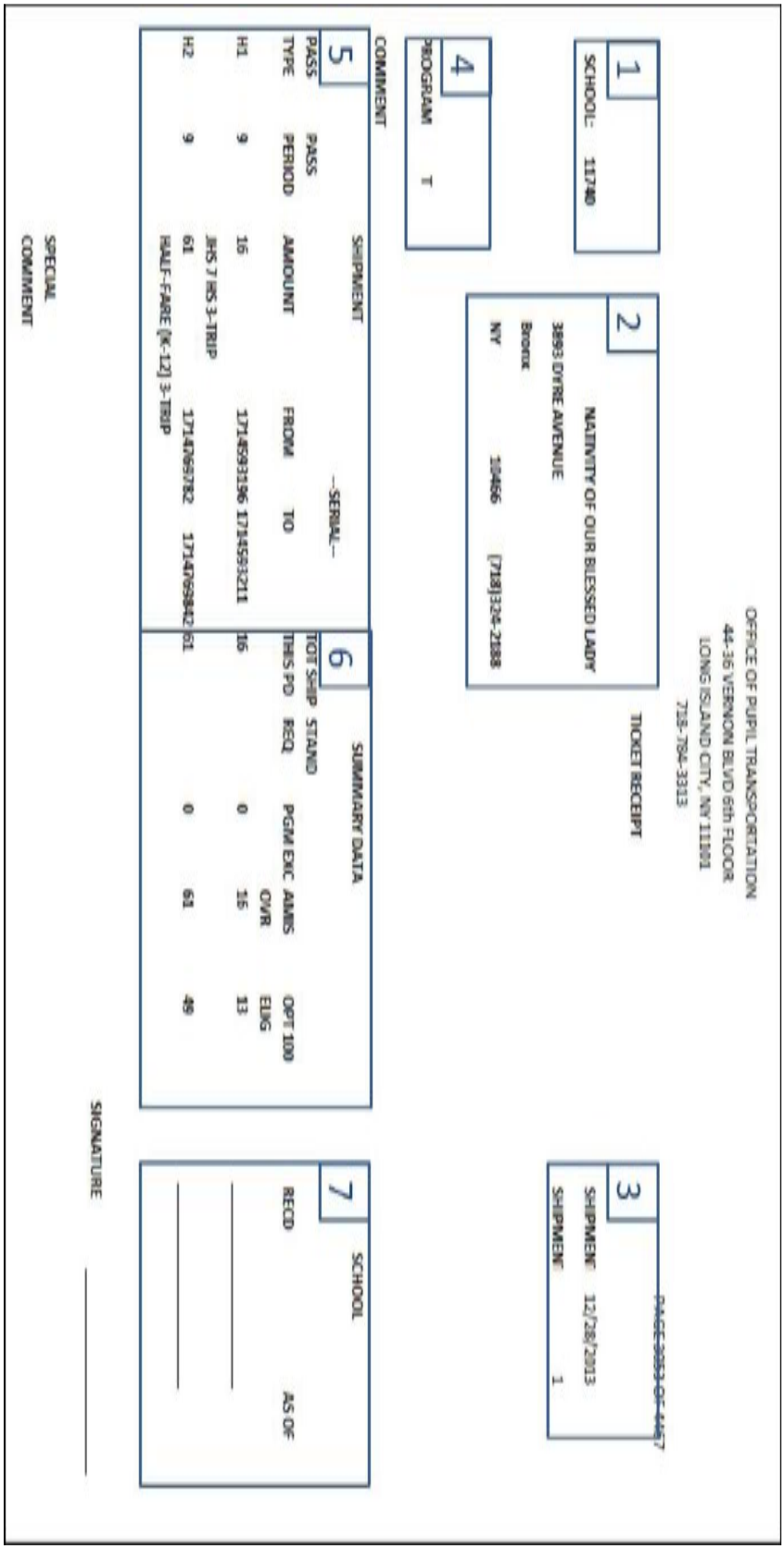
A. Sample Non-Public School MetroCard Ticket Receipt

B. Sample NPSIS Ridership Report

C. MetroCard Management—NPSIS Users

D. Sample generic MetroCard Distribution Log

Attachment A—Sample Non-Public School MetroCard Ticket Receipt



OFFICE OF PUPIL TRANSPORTATION
44-36 VERNON BLVD 6th FLOOR
LONG ISLAND CITY, NY 11101
718-784-3313

TICKET RECEIPT

PAGE 0053 OF 4457

1
SCHOOL: 11740

2
NATIVITY OF OUR BLESSED LADY
3893 DYRE AVENUE
Bronx
NY 10466 (718)324-2188

3
SHIPMENT 12/28/2013
SHIPMENT 1

4
PROGRAM T

COMMENT

5
SHIPMENT —SERIAL—
PASS TYPE PASS PERIOD AMOUNT FROM TO
H1 9 16 1714593196 1714593211
H2 9 61 1714769782 1714769842 61
HALF-FARE (K-12) 3-TRIP

6
SUMMARY DATA
TOT SHIP THIS PD STAND REQ PGM EXC AMBS OVR OPT 100 ELIG
16 0 15 13
61 0 61 49

7
SCHOOL
RECD AS OF

SPECIAL COMMENT

SIGNATURE

Attachment B—Sample NPSIS Ridership Report

The Office of Pupil Transportation Ridership Report

School	School Name	Grade Range	School Address	Boro	City	State	Zip
03740	CORPUS CHRISTI SCHOOL	PK,0K,01,02,03,04,05,06,07,08	535 WEST 121 STREET	Manhattan	MANHATTAN	NY	10027

Print Ridership Report: Change Page Setup to Landscape > Legal

Student names displayed here

ID numbers

LNAME	FNAME	MI	DOB	SEX	Gr	ID	APT	HOUSE	STREET	BORO	ZIP	DISTANCE	PASS	Description	SpED	MetroCard #	ERROR	STOP	VARIANCE
ANGUISACA	ALLYSON		3/11/2005	F	04	100785847	BSMT	2445	FREDERICK DOUGLAS BOULEVARD	1	10027	B	H2	Half Fare	N		PI210		
AYTES-ANDREU	ARLET		10/21/2011	F	02	100840958	40	420	WEST 119 STREET	1	10027	A	H2	Half Fare	N				
BAYLESS	MATTOX		1/23/2009	M	03	100840981		880	ST NICHOLAS AVENUE	1	10032	D	E1	Full Fare	N				
BAYLESS	SAMSON		9/24/2006	M	06	100840985		880	ST NICHOLAS AVENUE	1	10032	D	E1	Full Fare	N				
BE			3/26/2011	M	02	100[illegible]976	33	550	RIVERSIDE DRIVE	1	10027	A	H2	Half Fare	N				
BE			8/28/2011	F	02	[illegible]	11-I	790	RIVERSIDE DRIVE	1	10032	D	E1	Full Fare	N				
BISCAGLIA	HAILEY		12/3/2009	F	03	100840982		735	GARDEN STREET	2	10457	D	E1	Full Fare	N				
BLACKMON	ANTHONY		10/1/2008	M	04	100785852	PHA	1590	UNDERCLIFF AVENUE	2	10453	D	E1	Full Fare	N				
BLACKMON	AYSIA		10/31/2009	F	03	100840983		1590	UNDERCLIFF AVENUE	2	10453	D	E1	Full Fare	N				
BRETON	JUSTIN	J	7/29/2006	M	06	100677427	9	507	WEST 138 STREET	1	10031	B	H2	Half Fare	N		PI210		

Record MetroCard Serial numbers here

MetroCard Management—NPSIS Users

To Select MetroCard 3-trip for Students

1. Click the Transportation link on the NPSIS home page
2. Select Transportation Requests for Multiple Students
3. The list of Students Not Assigned Transportation will display
   - Select Special Ed Yes if the student has an IEP
   - Select MetroCard 3-Trip from the drop-down menu

You can complete entries for all students on the page and then click the Save button

The next day, the students will appear on the Students Assigned Transportation Screen and the NPSIS Ridership Report
The type of MetroCard they should receive will be displayed
Write the serial number of the card provided to the student on the Ridership report or your Manual Log

To Deactivate a MetroCard

1. Click the Transportation Link on the NPSIS home page
2. Click Negative List/Deactivate MetroCards
   - Enter contact information in the fields on the left
   - Enter the serial number of the MetroCard in the box on the right
     (If you have multiple cards, click Add to List and the next serial number)
3. Click Confirm

Your school's list of deactivated cards can be viewed on the Deactivated MetroCards report at the Transportation menu

Attachment D: Sample Generic MetroCard Distribution Log

School Name: _____ **OPT Code:** _____

Student Name	Type of MetroCard	Serial Number