TRANSPORTATION FIELD TRIP REQUEST REFERENCE MANUAL

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THE PROCESS OF REQUISITIONING FIELD TRIPS

1. **RQ CLERK SUBMITS TRIP REQUEST**
RQ Clerk enters trip details into Trip Tracker and submits the Trip Request. (see pages 3-8)

2. **Transportation Department Approves the Data**
Customer Service Billing Clerk looks over the financial arrangements and components to make sure they are all correct. Customer Service RQ Clerk looks over the trip details to ensure that they are all correct. If not the Trip Request is rejected thus sending it back to the School RQ clerk for modification, reactivation, and submission.

3. **PRINCIPAL APPROVES TRIP REQUEST**
The Principal looks over the trip details and based on financial considerations he/she approves, rejects or cancels the Trip Request in Trip Tracker. (See pages 13-20)

4. **CUSTOMER SERVICE SCHEDULES THE TRIP**
Customer Service schedules the Trip Request in Trip Tracker once the principal has approved the Trip Request

COMPLETING TRIP REQUESTS

(For Items 1-8 utilize Exhibit A1 on page 6)
(For Items 9-12 utilize exhibit A 2.1 on page 7)
(For Item 13 utilize Exhibit A 3.1 on page 8)

1. **ENTER TRIP NAME**
    a. The Trip Name should first include the briefest name of the school, church or organization.
    b. A hyphenated or Trip Name may also be utilized (Examples: Webster- Band, Hale- Baseball, or Emerson – Zoo).
2. **ENTER TRIP TYPE**
    a. Trip Type is the kind of bus or vehicle that will be used for the trip.
        i. *Yellow buses may only be requisitioned during the following timeframes:*
            1. *From 9:30 a.m. to 1:30 p.m. on school days (Elementary schools can usually go to 1:45 or 2:00.)*
            2. *After 5:00 p.m. on school days*
            3. *Anytime on non-school days*
3. **ACTIVITY TYPE**
    a. You should NOT put anything in this box.

4. **REASON FOR TRIP**
    a. Brief description of the reason for the trip (Example: All-City Tournament, 5th Grade Zoo Trip, etc.)
5. **ACCOUNT**
    a. There are nine types of accounts set up for each school. Locate your school name and type of bus you are wanting by utilizing the dropdown box and select the appropriate account to be billed. (Examples: Edison HS Coach, Hale HS SiteBase, or Hoover Yellow)
        i. Coach, PTA, SAF, SiteBase, SiteBase W/Driver, Van, Van W/Driver, Van Trailer W/Driver and Yellow.
        ii. If the money for the trip is coming out of another fund, then simply choose the account with the correct type of bus and in the Notes section at the bottom say something like: *To be paid for by "name of fund," and "the address" and "person to whose attention it should go."*
6. **REQUESTER'S NAME**
    a. Utilize the dropdown menu to select your name. If you are not located on the dropdown box please contact CSC at, 833-8100 or email csctrans@tulsaschools.org.
7. **ORIGIN**
    a. This is the location of where you would like to be picked up for your field trip.
    b. The Origin location should never be included as the first or last destination. It is assumed already that it is the starting point and the ending point of the trip by its being the Origin.
    c. Departure and Return Date and Times should be added next.

8. **DESTINATION(S)**
    a. This is the place or places you would like to be transported to. You can have multiple destinations. See example below:
        i. Destination 1. Allen Bowling Alley
        ii. Destination 2. Big Splash
        iii. Destination 3. Skate Land
    b. Fill in the provided boxes with the first destination and arrival and departure from that destination. Then click on the Add button. The Destination will be transferred to a box below with all the information and the boxes you had put the information into will be cleared out.
    c. If you have a second Destination, then put the appropriate information for your second destination into the empty boxes just as you did for the first destination. Then click on the Add button and this Destination will also be added into the box below with the first Destination. The boxes you filled in will be emptied out again.
    d. You may continue to add destinations in this way, as many as you need, until you are finished.

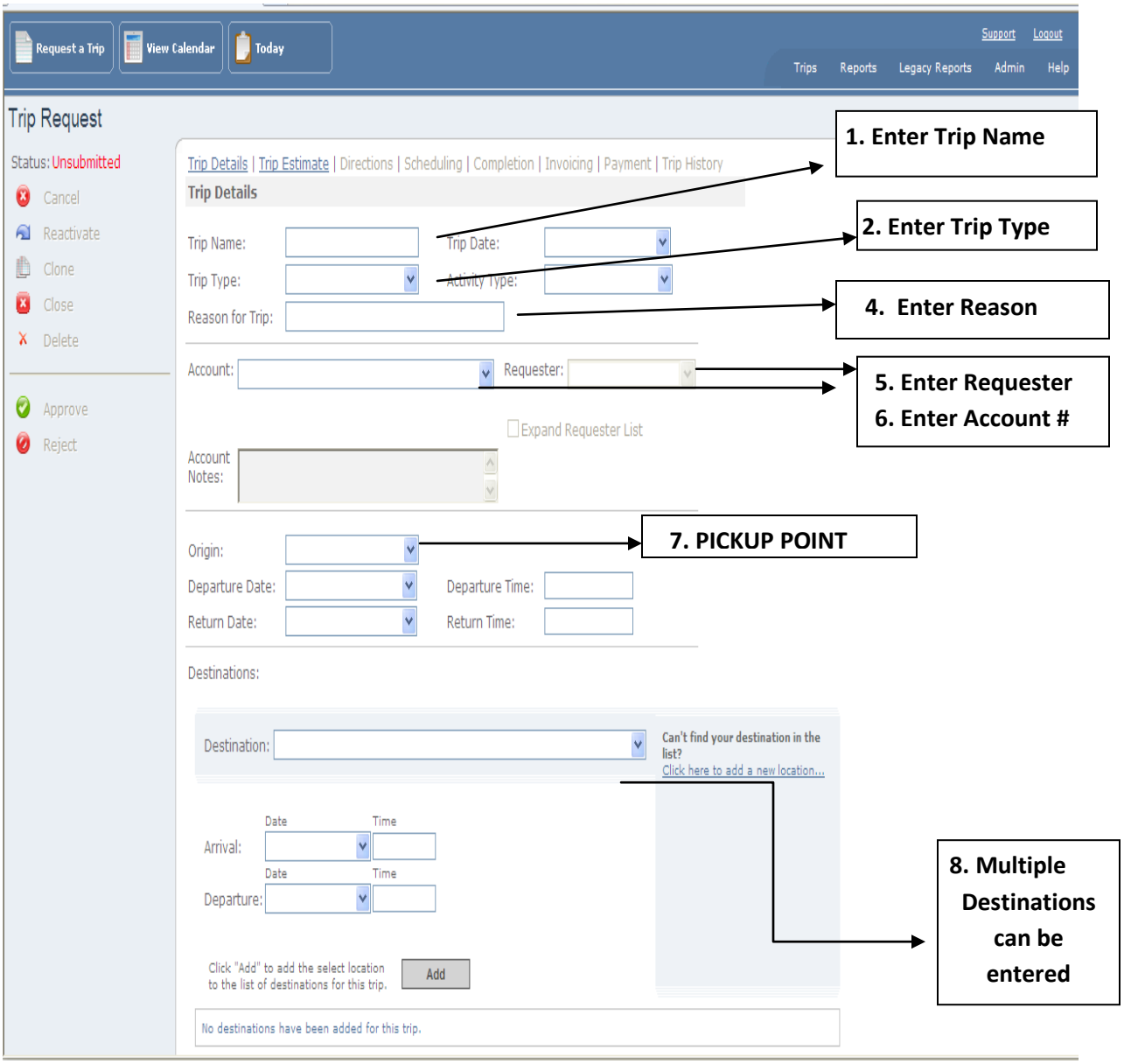

Request a Trip
View Calendar
Today
Support
Logout
Trips
Reports
Legacy Reports
Admin
Help
Trip Request
Status: Unsubmitted
Cancel
Reactivate
Clone
Close
Delete
Approve
Reject
Trip Details | Trip Estimate | Directions | Scheduling | Completion | Invoicing | Payment | Trip History
Trip Details
Trip Name:
Trip Date:
Trip Type:
Activity Type:
Reason for Trip:
Account:
Requester:
Expand Requester List
Account Notes:
Origin:
Departure Date:
Departure Time:
Return Date:
Return Time:
Destinations:
Destination:
Can't find your destination in the list?
Click here to add a new location...
Date
Time
Arrival:
Departure:
Click "Add" to add the select location to the list of destinations for this trip.
Add
No destinations have been added for this trip.
1. Enter Trip Name
2. Enter Trip Type
4. Enter Reason
5. Enter Requester
6. Enter Account #
7. PICKUP POINT
8. Multiple Destinations can be entered

Exhibit A 1

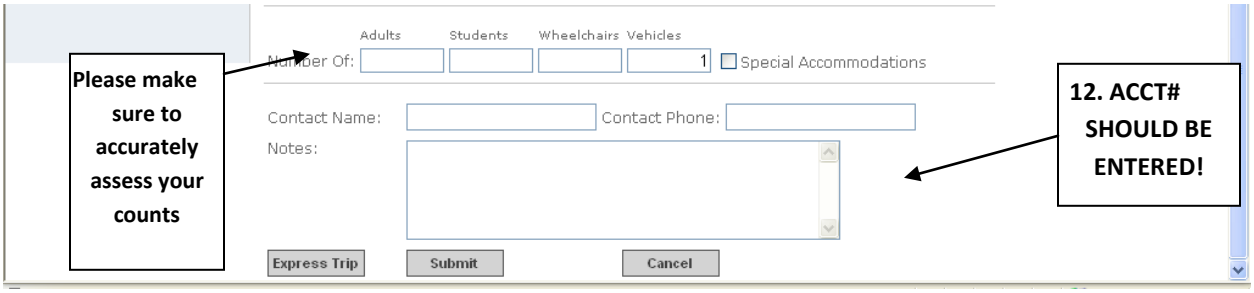


Exhibit A 2.1

9. **PASSENGER COUNT**
   a. Regular Yellow Buses
      i. Pre-K – Kindergarten =71 students
      ii. 1st -12th grade =48 students
   b. Large Yellow Buses
      i. Pre-K – Kindergarten =84 students
      ii. 1st – 12th grade =56 students
   c. Coach Buses (Blue)
      i. 38, 48, or 55 seats depending on bus (limited number of 55 passenger buses issued on a first come first serve basis).
      ii. These buses are not site base buses and only Transportation has specifically trained drivers to drive these buses.
   d. Van(s)
      i. 7 Riders and 1 Driver
   e. Number of adults would be equivalent to (2) 4th – 12th grade students.

10. **NUMBER OF VEHICLES**
   a. Utilize the information obtained above regarding passenger count to ensure that the number of students riding can be accommodated by the number of buses requested.

11. **CONTACT NAME & PHONE NUMBER**
   a. The contact name and number (preferably a cell phone) provided should be of the party that will be an active chaperone on the trip. This information enables contact between the Transportation Staff and the party in the event of an emergency.

12. **NOTES:**
   a. **This section is very important.** The following information should be provided in the notes.
      i. **All billable account numbers such as; Walker and SAF numbers.**
      ii. Site base driver names (Coaches driving for the school – Non-transportation staff)
      iii. Precise pick-up locations (East side of building, in the circle drive, etc.)
      iv. If the driver is not needed for the entire day it is necessary to advise that the trip will be a, "*pick-up and drop- off only*".
      v. Additional contact information may be noted here as well.

13. **Entering Trip Estimate**

a. Click on the Trip Estimate tab located at the top of the request (It is in blue lettering).

b. In the "Destination Calculation" section enter the mileage in the "Distance" box (It is outlined in blue).

c. A list of frequently requested trip mileage will be posted on the transportation website.

i. If the mileage is not on the frequently request trip mileage sheet the mileage will be entered by the Billing Clerk.

1. Please do your best to enter mileage this will ensure prompt scheduling of the field trip.

d. Click on the "Save Estimate" button

e. **RETURN TO THE TRIP DETAILS SCREEN TO SUBMIT THE REQUEST**

i. Click on the "Trip Details" button at the top of the request.

ii. If you do not return and submit the request, it will not be saved.

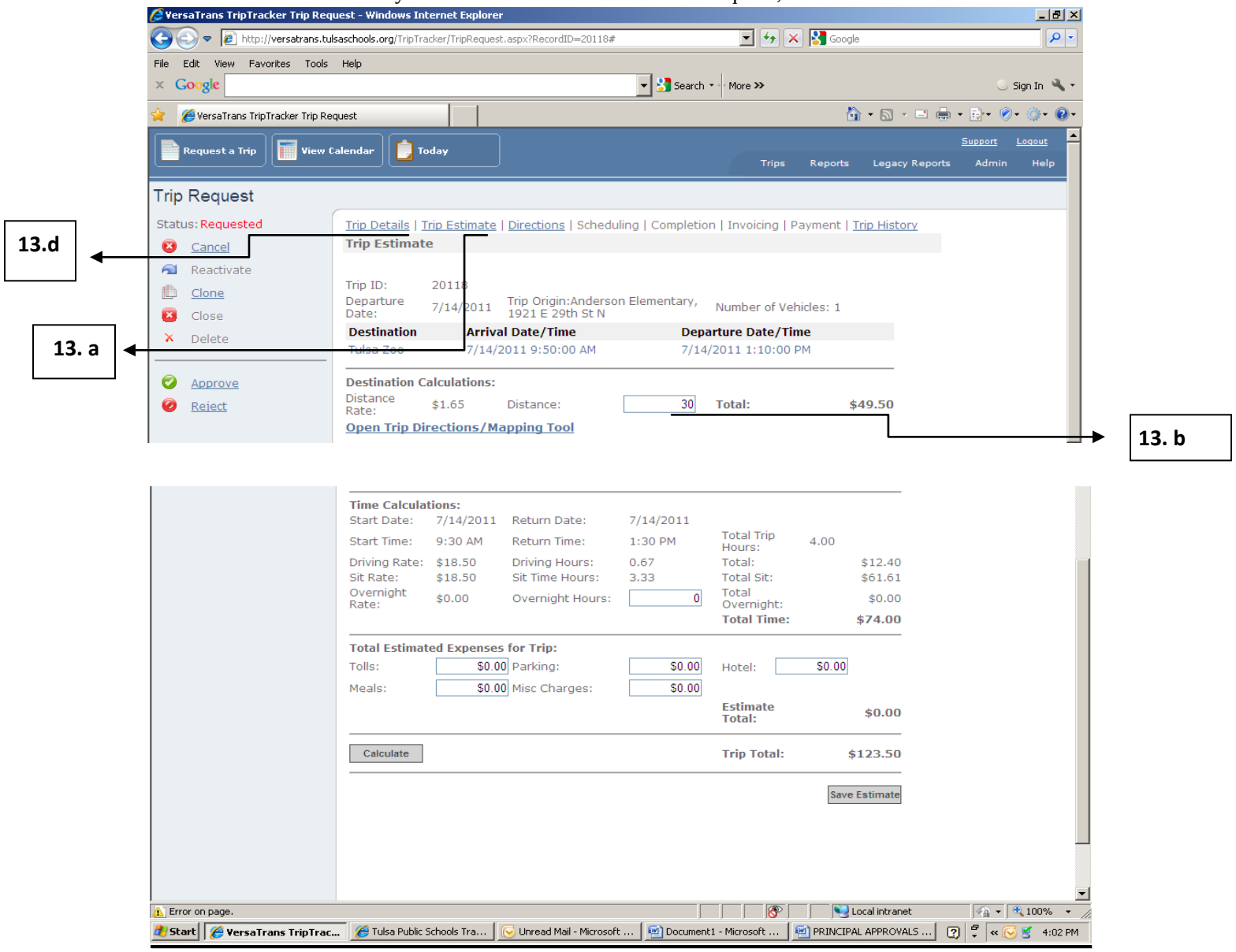


Exhibit A 3.1 1

SUBMITTING A TRIP REQUEST AFTER ENTRY

(FOR ITEM 14 UTILIZE EXHIBIT A 4.1 AND A 5.1 ON PAGE 11)

14. **Click the "*Submit*" button!**
    a. By clicking the submit button at the bottom of the screen you have successfully requested your trip.
    b. After submitting be sure to check the top left hand corner verify that the status states, *"Requested"*.
    c. After your Status says "*Requested*" you should then click on Trip Details which is located on the far left side of the line of options across the top of your page.
    d. When the new page comes up with the trip details it will have your Trip ID # on it also. It is recommended that you print this page off and save it for future reference. You will be asked for the Trip ID # anytime you call to ask a question or to request a change in this trip and should have it available.

SUBMITTING AN EMERGENCY TRIP REQUEST VIA EMAIL

e. Schools must email all emergency trip requests (trips requested with less than seven days notice given).
f. Forms can be provided via email by requesting it from the Customer Service Department at Transportation, csctrans@tulsaschools.org.
    i. Once received please save the document. The document is a form and if it is not saved you will not be able to utilize the dropdown boxes.
    ii. If you are unable to utilize the form to describe your needs please feel free to utilize the notes section.
g. This email trip request form or Trip Tracker Trip Request Form must be filled out and emailed to Customer Service at csctrans@tulsaschools.org. Do **NOT** email it to any Customer Service Associate directly.

TRIP MODIFICATIONS AFTER ENTRY

(FOR ITEM 16 UTILIZE EXHIBIT A 6.1 AND A 7.1 ON PAGE 12)

15. When you want to make changes to the trip details for a particular trip, the following steps can be followed so long as the trip is either in the "*Requested*" or "*Approved*" status. If the trip is in "*Scheduled*" status, the destination(s) cannot be modified.
16. To make changes to the trip details the following steps should be taken:
    a. Select "*Edit Request*" at the bottom of the page.
    b. Make the desired modifications.
    c. Click the "*Save*" button at the bottom of the page. Failure to click this button will result in your modifications not being recorded.
    d. Ensure that your modifications were recorded by closing out the trip and going back into it.
17. ***VERY IMPORTANT:*** When you make any significant change(s) to a trip that is in Approved Status, you are required to contact an RQ Clerk in Customer Service and to give him notification of the changes you made. Otherwise Customer Service cannot guarantee that your trip will be run according to the changes you made.

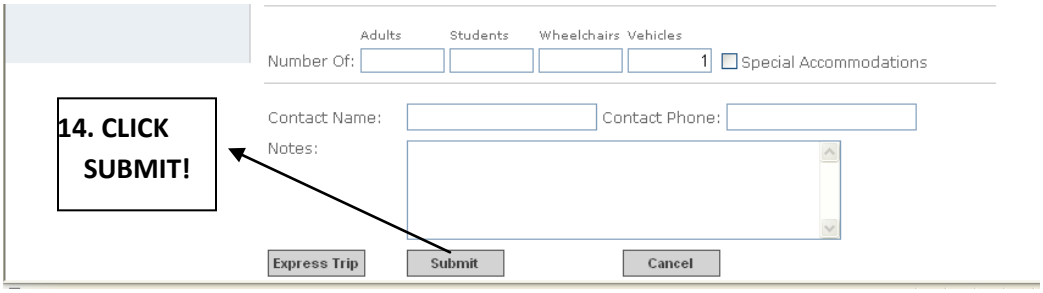


Exhibit A 4.1

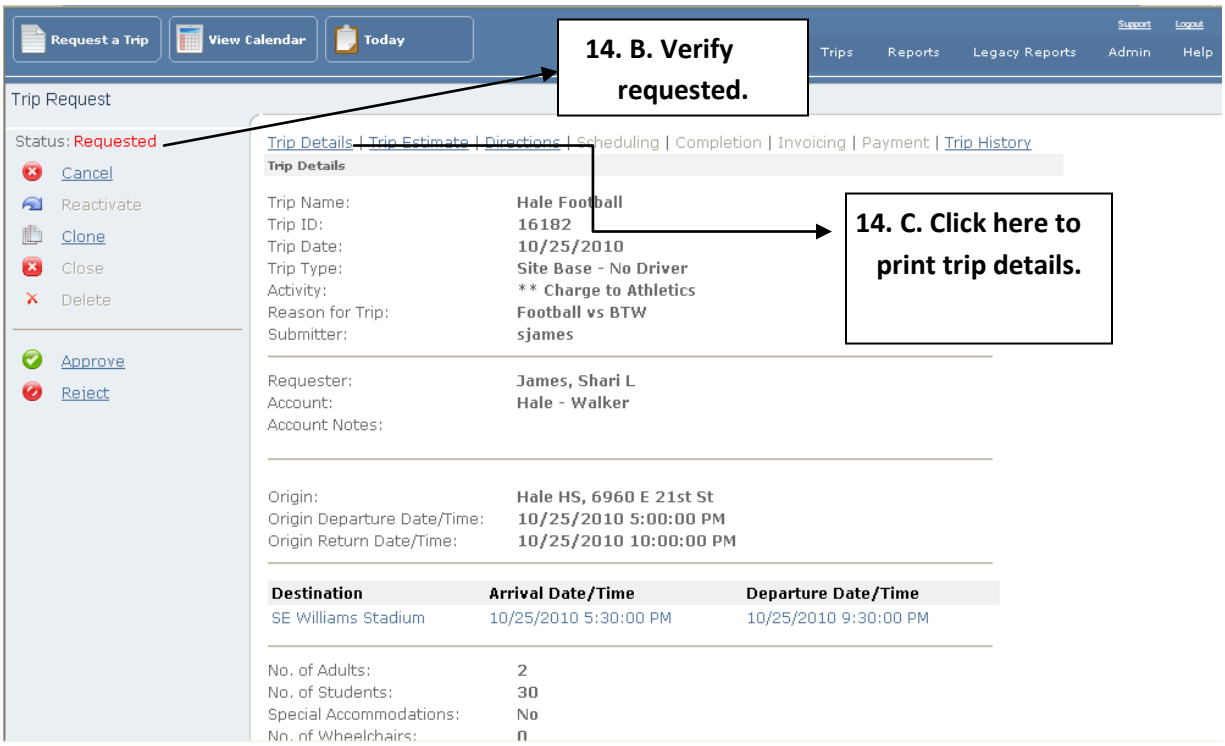


Exhibit A 5.1

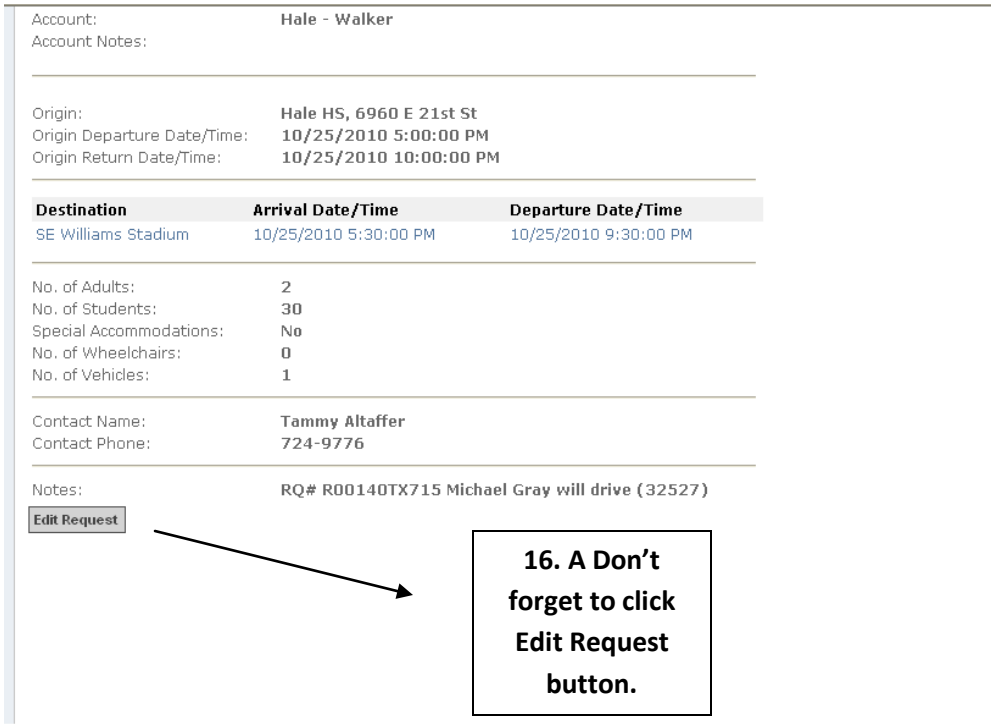


Exhibit A 6.1

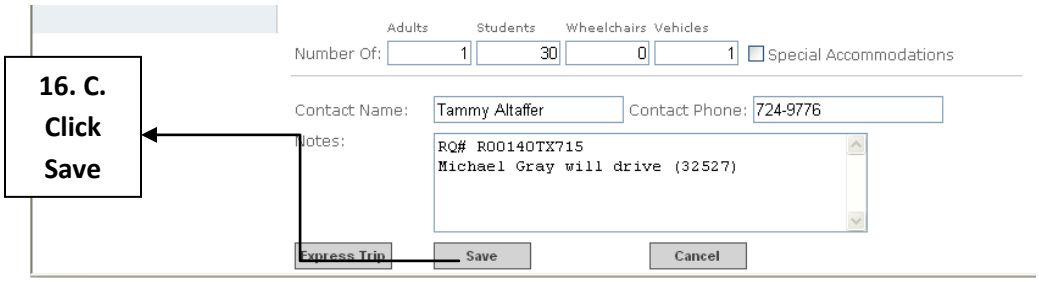


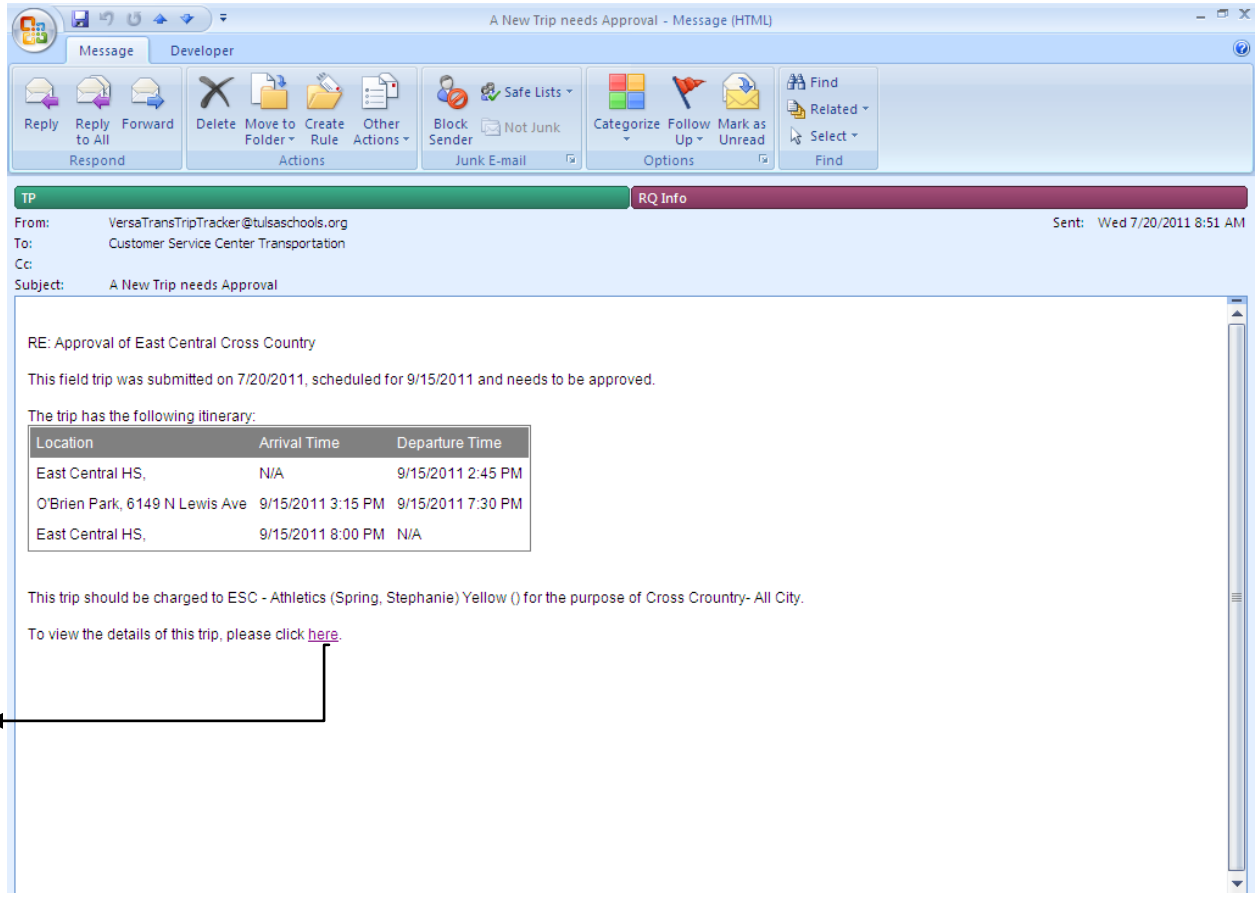
Exhibit A 7.1

PRINCIPAL APPROVALS

(For Item 18 utilize Exhibit A 8.1 thru Exhibit A 10.1 on page 13-15)
(For Item 19 utilize Exhibit A 11.1 thru A 13.1 on page 16-18)
(For Item 20 utilize Exhibit A 14.1 on page 19)

There a couple of ways to retrieve the trip request please refer to 18 and 19

18. **How to use a "VersaTransTripTracker" e-mail to retrieve a "Trip Request"**
    a. The principal will receive an e-mail from Trip Tracker of each "Trip Request" to approve. Click on the "Click here" to view the details. This will open "Trip Tracker"



18. a

Exhibit A 8.1

b. User Name = your 5 & 2
c. Enter your password

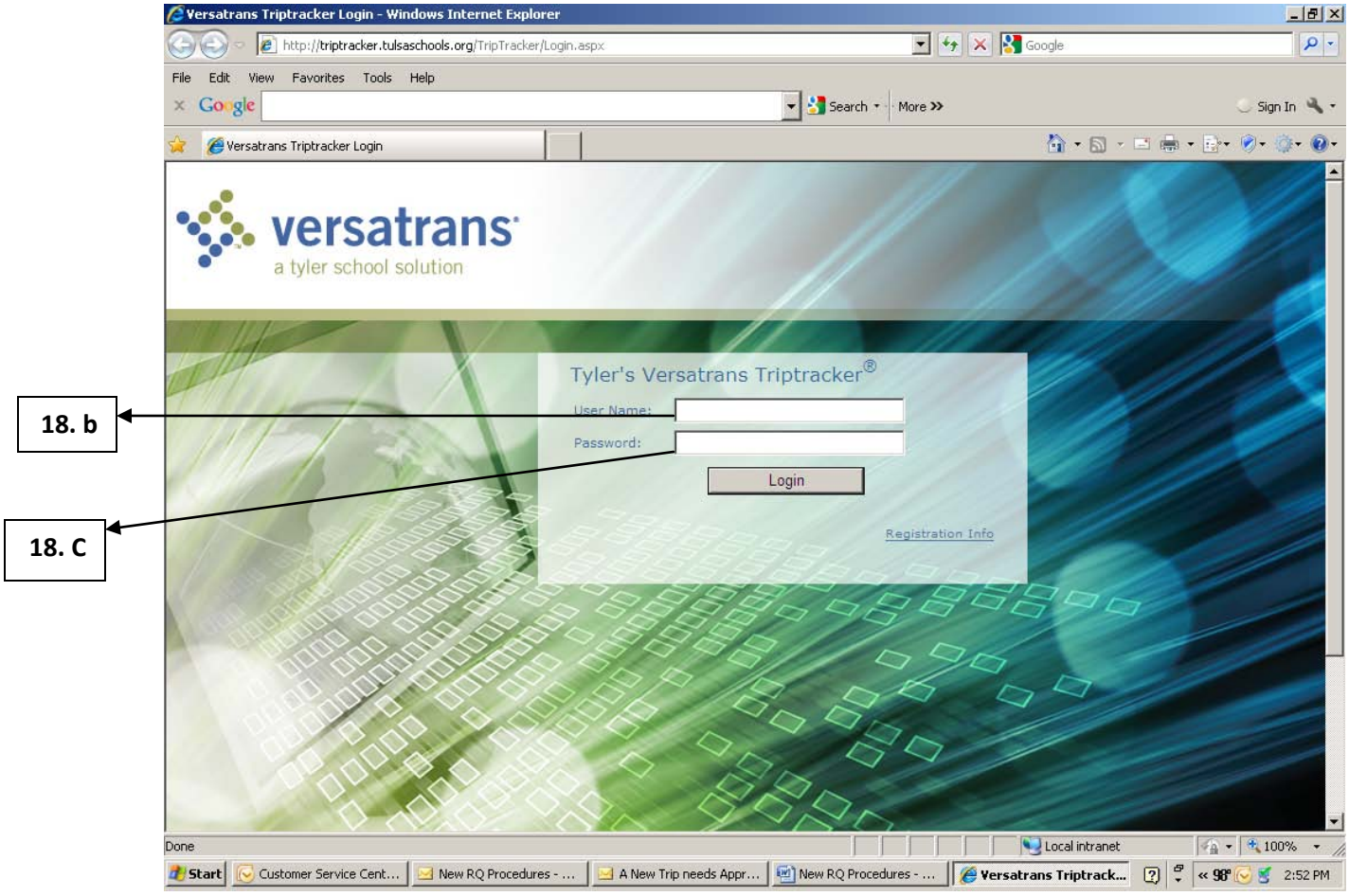


Exhibit A 9.1

d. This retrieves the “Trip Request” for approval. (Proceed to number 20 if this is the “Trip Request” retrieval process you used)

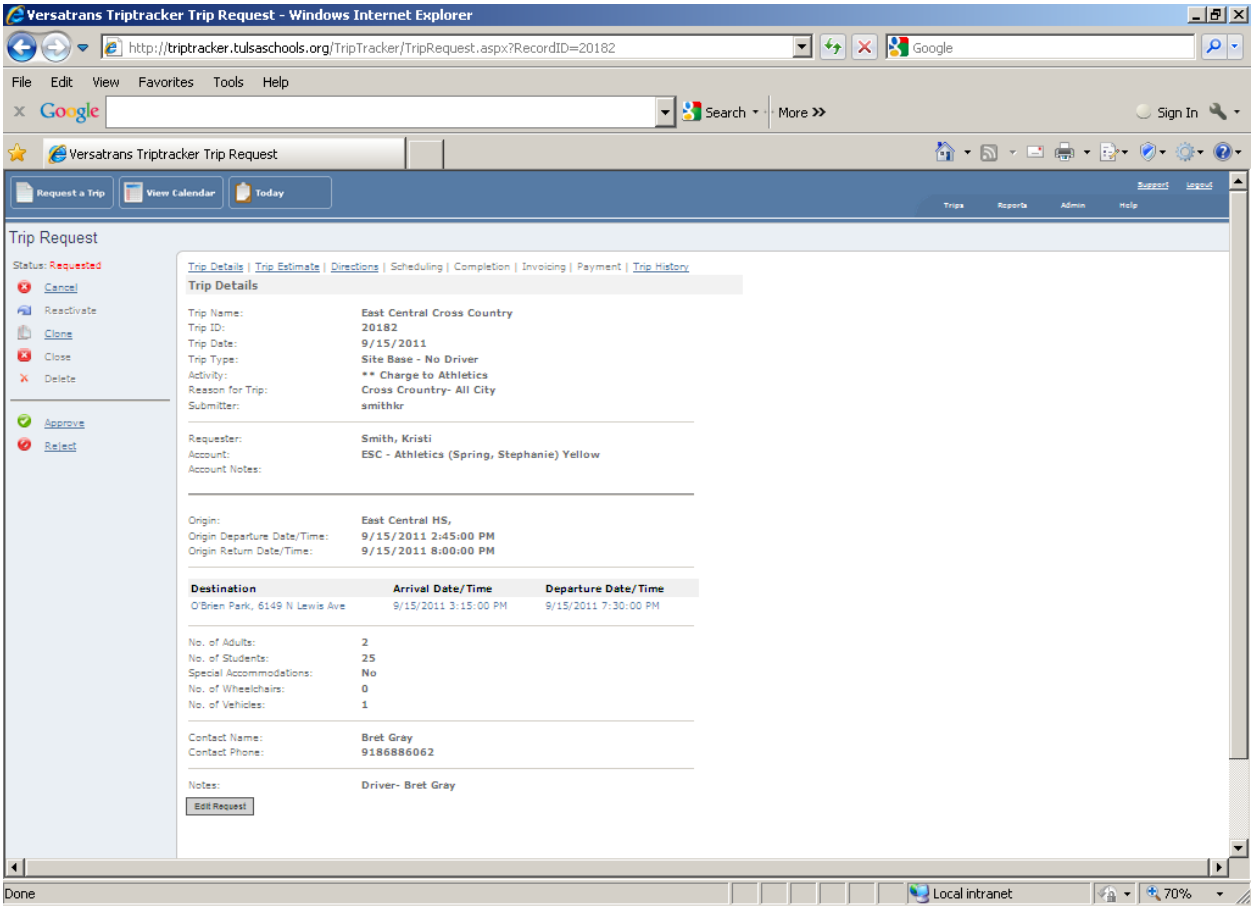


Exhibit A 10.1

19. **How to "Log into Trip Tracker to retrieve a "Trip Request"**
    a. Go to http://www8.tulsaschools.org/
    b. Go to Administration Tab
    c. Go to Departments
    d. Go to Transportation
    e. Go to Trip Tracker
        i. User Name = your 5 & 2

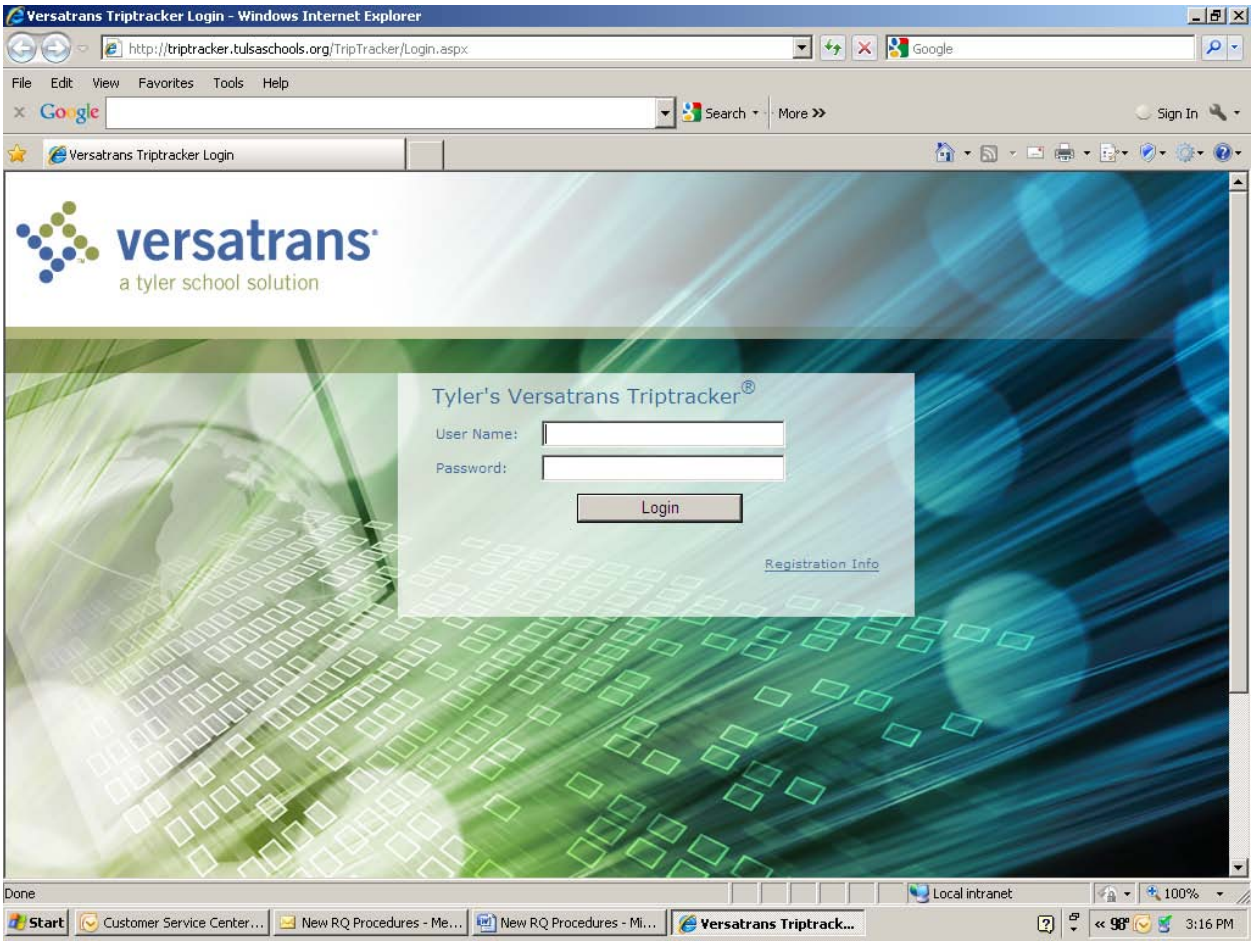


Exhibit A 11.1

f. Click on “you have 95 trip request pending your approval” (your number will be different from other schools or personnel)

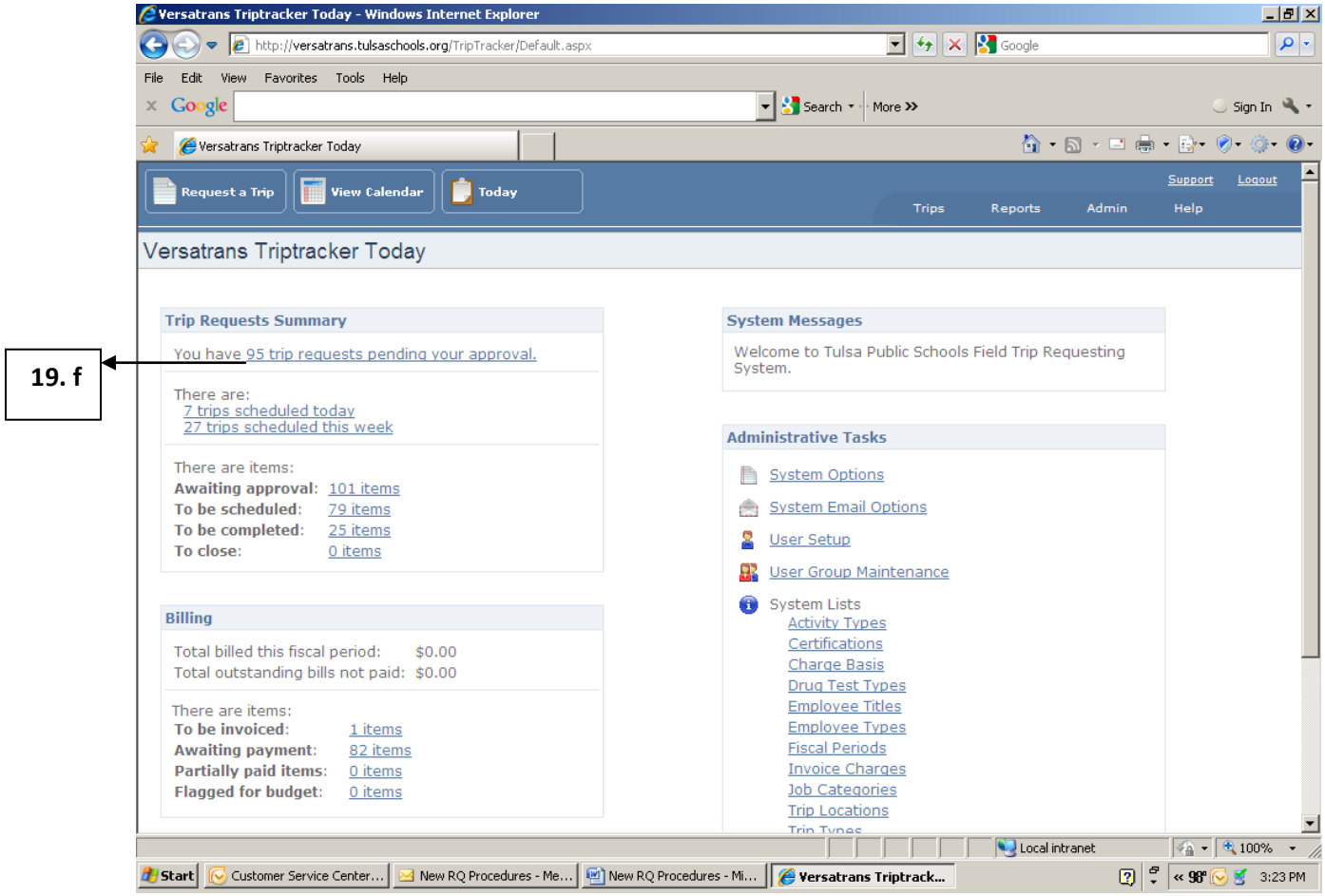
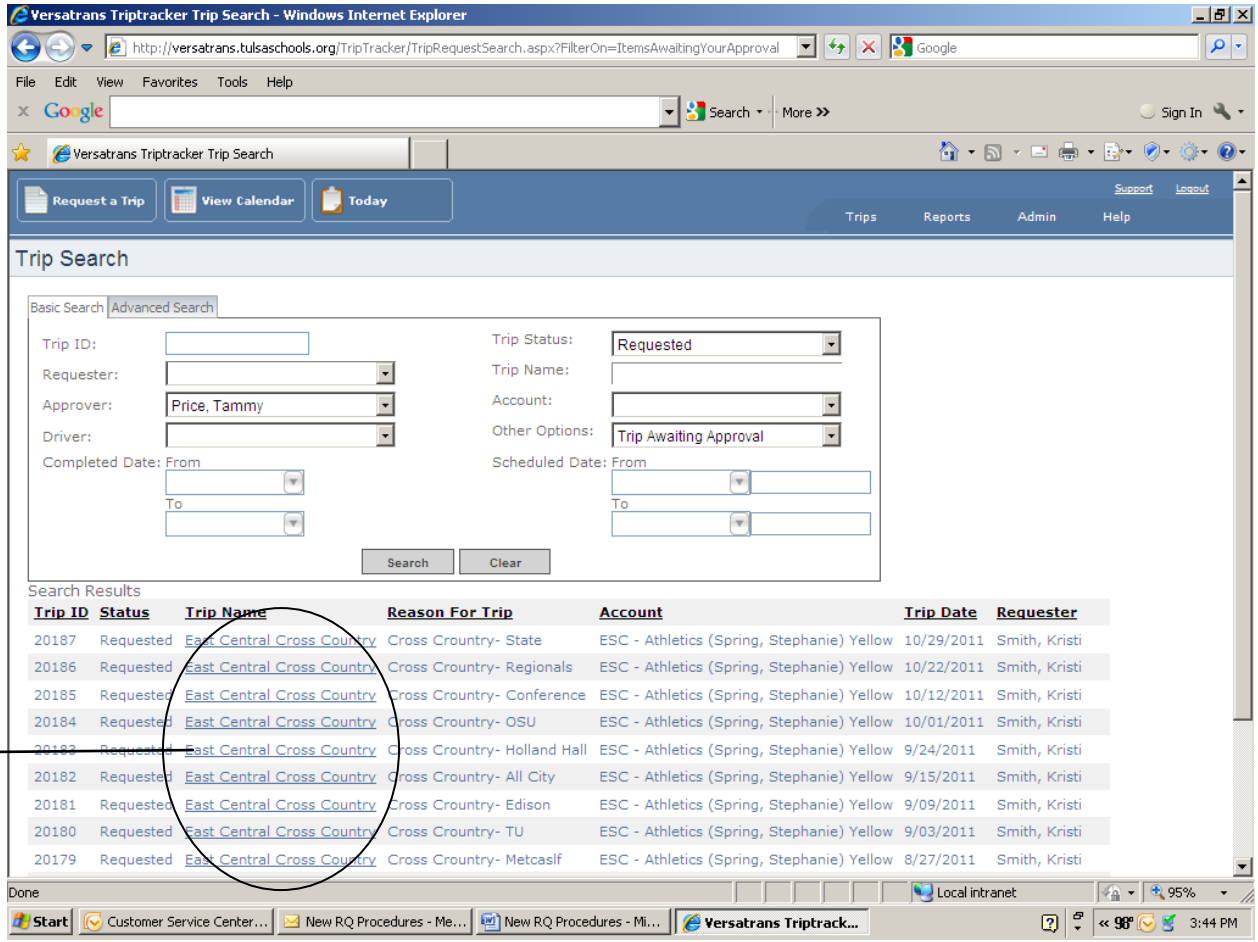


Exhibit A 12.1

g. All trips waiting for approval will be listed. Click on each “Trip Name” and start the approving process. (Proceed to number 20 if this is the “Trip Request” retrieval process you used)



19. g

Exhibit A 13.1

20. **Approving the Trip**

a. View the Trip Request to ensure the information is correct.

b. View the Trip Estimate

i. Click on the Trip Estimate tab across the top of the page

ii. To return to the main page Trip Details simply click on the Trip Details tab.

c. If the trip is ready to approve then go to the Trip Details screen. Place and click your cursor over the Approve button. It is located down the left side of the screen. A comment box will appear below (You may make a comment or leave it blank) click on the Approve Trip button to approve. It will show Approved in red at the top left column.

d. If the trip is incorrect place and click your cursor over the Reject button. A comment box will appear below. Please leave a comment as to why the trip is rejected, and then click the Reject button. It will show Rejected in red at the top left column.

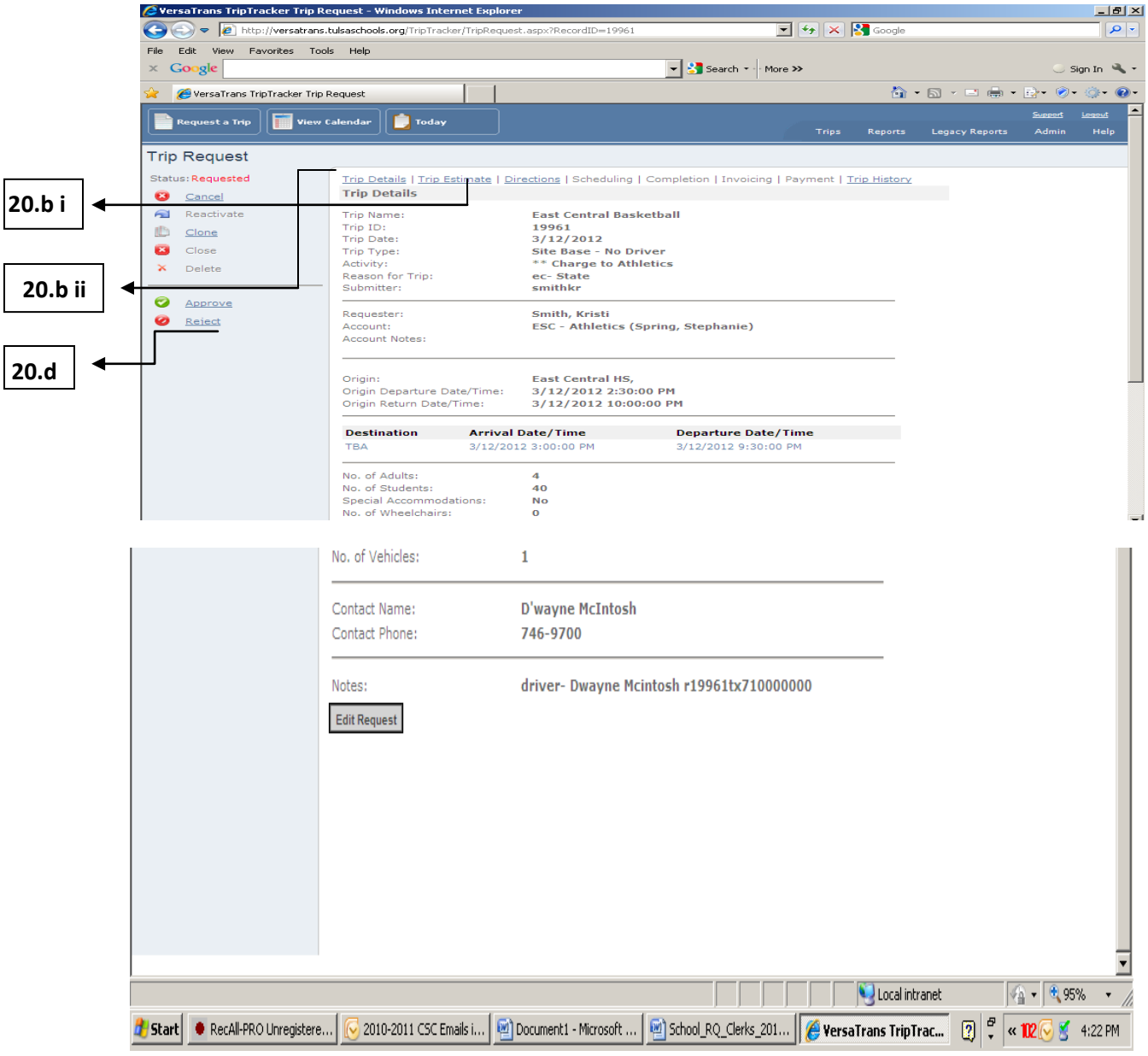


Exhibit A 14.1

TRIP MODIFICATIONS AFTER ENTRY

(FOR ITEM 16 UTILIZE EXHIBIT A 6.1 AND A 7.1 ON PAGE 11)

1. When you want to make changes to the trip details for a particular trip, the following steps can be followed so long as the trip is either in the "*Requested*" or "*Approved*" status. If the trip is in "*Scheduled*" status, the destination(s) cannot be modified.
2. To make changes to the trip details the following steps should be taken:
    a. Select "*Edit Request*" at the bottom of the page.
    b. Make the desired modifications.
    c. Click the "*Save*" button at the bottom of the page. Failure to click this button will result in your modifications not being recorded.
    d. Ensure that your modifications were recorded by closing out the trip and going back into it.
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