



TRANSPORTATION FIELD TRIP SYSTEM

What's Going on Behind the Scenes?

While filling out the on-line bus trip request form is as easy as filling in any other standard online form, there is a LOT going on behind the scenes that you may not realize!

- Account validation – The bus trip system checks the PeopleSoft system to be certain the account strip has been established in the school's budgetary accounts. If the account strip does not exist in PeopleSoft, process a budget amendment to establish and fund the expenditure.
- Default coding of expenditures – certain elements of the account code will be "hard coded" into the system to eliminate errors and miscoding of expenditures.
- Ability to browse and view bus trip documents on-line – Schools may view their completed or pending bus trip tickets on-line and screen print copies as required for internal communication and record keeping.
- In addition, the bus trip system interfaces with other District subsystems and accumulates data the Transportation Department can use to evaluate and improve their performance on extra bus trips. They can track which buses were used for extra bus trips and it allows them to track trip mileage, trip times, bus driver rates of pay, which drivers were assigned to the trip, etc.

What do all those Fund Type codes mean?

The fund type codes provide schools with the capability to use a variety of funding sources at the school level to pay for bus trips, and it also permits them to route their bus trip request to District departments for funding at the District level. The District Fine Arts and Multicultural programs all provide bus transportation for some student events. The on-line system allows these district-level departments to review the trip up front to be sure it meets their criteria and provide funding for approved expenditures.

How can I pay for bus transportation charges?

There are a variety of funding sources to pay for bus transportation for field trips and special events. Not all funding sources are available to all school centers, so you will need to check with your Principal or Budgetkeeper to see what is available at your particular school center.

- School Operating Budget – Some schools have established a special budget line item in their school operating budget specifically to fund bus transportation for field trips and special events. Use FUND TYPE code **SR** for these trips. The funding on code SR will default to the following account strip in the school budget: DEPT/1000/7803/579200/0000/DEPT/000. The department number will be entered by the system and will match the department number specified on the main TR71 sign-on menu. The Budget Manager chartfield is a required and if not filled in by the system, it will need to be entered manually by the school.

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- SACC (School Aged Child Care) – Schools with SACC after school programs may reserve District buses for field trips and special events by using FUND TYPE code **SA**. The default funding on these trips will be DEPT/1301/9110/579200/0000/DEPT/000. The SACC department and budget manager will be entered by the school to complete the funding strip.
- School Internal Accounts – Bus trips funded from student activities may be requested by using FUND TYPE code **SI**. The default funding on these trips will be DEPT/1801/9810/579200/9470/DEPT/000/SDEPT. The location will match the location number entered on the TR71 main sign-on panel. These charges will be billed through the PeopleSoft A/R and Billing system. Invoices will be generated and printed by the schools and the charges may be paid by issuing an internal accounts check payable to the District. The school project number (SXXXX) must be used with this fund type in order to generate a charge back to the school internal accounts. Internal accounts invoices are due and payable 30 days after the billing date.
- School Grants – Schools that have special revenue grants (Title I program, Migrant program, Pre-Kindergarten Grant, School Recognition Program) may use FUND TYPE code **SG** to charge bus trip expenditures to their grant accounts. Since these grants are so diverse, the school must provide the appropriate fund, function, program, budget manager and award year chartfields for these expenditures. The default account is 579200, and the school location number will default from the main TR71 sign-on panel. The rest of the chartfields must be completed by the school in accordance with the grant budget.
- District-funded Trips – Several district departments provide funding for special events and field trips that are part of the school curriculum. The Fine Arts and ESOL curriculums provide bus transportation for students to attend specific field trips and special events. Instructors in those fields are responsible for following the proper procedures to request district funding of the bus transportation charges. Use FUND TYPE code **DF** (Fine Arts) or **DM** (Multicultural) to route your bus trip requests to the appropriate district department for funding consideration. *When using FUND TYPE code DF, the SUB-TYPE code must be used.*
- Outside Agencies – Sometimes outside agencies provide bus transportation for certain special events or field trips that are part of the school curriculum. Use FUND TYPE code **OT** and select the appropriate Project Number (S9XXX) for Junior Achievement (S9486), Pine Jog (S9480), Dolly Hand Theatre (S9478), Palm Beach Pops (S9488), to name a few of our past benefactors. If outside groups contact your school and agree in advance to fund the cost of the bus transportation, contact Marysue Bean in the Accounting Department to set up a customer number and Accounting will bill the agencies directly for the bus transportation costs.
- Charter Schools – Charter schools may use the district system for field trip buses. This will result in a billing to the school's accounts receivable statement and the funding will be DEPT/1801/9810/579200/0000/9333/000/SDEPT. Charter schools are required to pay all district obligations within 30 days of the billing date to maintain their account in good standing with the district.

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IMPORTANT NOTE: The funding decision must be made BEFORE the trip is scheduled, not afterwards. This may represent a big change for some school centers, and trip sponsors should be advised that:

1. ALL expenditures coded to the school budget (operating budgets, grant budgets, SACC budgets) must be adequately funded through the budget system.
2. ALL expenditures coded to school internal accounts must be paid on a monthly basis.
3. ALL district-funded bus trip requests are subject to review and approval by the funding department before they can be processed and routed by the Transportation Department.

How do I request a bus trip in the on-line system?

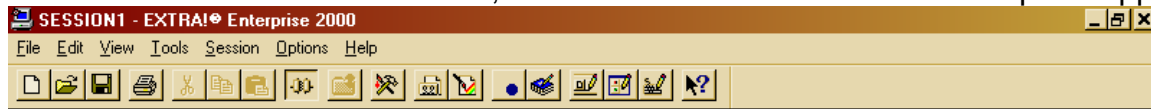
The first step is to request access to the TR71 panel by completing a Mainframe Access Request form (PBSD 1362). This is a Liquid Office form that is completed online by the employee. The form is then electronically routed to the principal/department head for approval and subsequently routed to the proper officials in IT/Security for action.

Once access has been established, you're ready to make arrangements for bus transportation. First, you will need some specific information from the faculty or staff member who is sponsoring the trip. The District Bus Trip Ticket (PBSD 1900) was devised for just that purpose. A blank copy is included in this training packet, although it is also available on the District's Forms website. Once completed, this form provides all the information that will be needed to successfully go on-line to request a bus, and it provides a way for the Principal, Head Secretary, or Activity Director (depending on how the workload is organized at your school center) to place the trip on the school calendar and approve the dates, times, and purpose of the trip.

To access the Field Trip System, you must first sign-on to the CICS system. This is the District mainframe. Turn on your computer, sign into your desktop, open a mainframe session, and follow the steps outlined on the following pages.

TRANSPORTATION FIELD TRIP SYSTEM

1. At the Mainframe Main Menu, enter **CICS** to access the CICS computer application.



0 THE SCHOOL DISTRICT OF PALM BEACH COUNTY, FLORIDA

FOR ASSISTANCE, CALL THE USER SUPPORT CENTER AT PX# 48940 OR 434-8940
YOUR MAINFRAME NETWORK ID FOR THIS SESSION IS PBG126

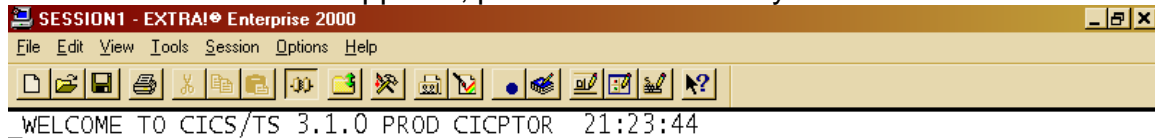
ENTER A SELECTION FROM THE MENU BELOW AND PRESS THE ENTER KEY

```
COMMAND      APPLICATION YOU WANT TO ACCESS
-----      -
CICS         ALL CICS ONLINE APPLICATIONS
```

==> cics



2. When the CICS screen appears, press the **PAUSE** key to clear the screen.



```
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*****\ *****\ *****\ *****\
**// **// **// **//
**\   \   \   \   \
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// // // //
```



TRANSPORTATION FIELD TRIP SYSTEM

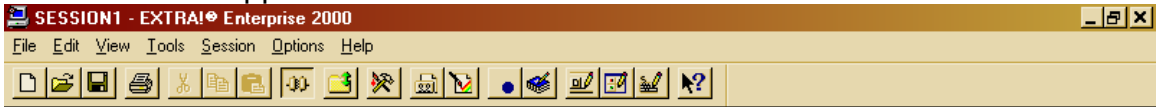
- When the screen is clear, enter CESN to sign on to the CICS application system. Press ENTER.



cesn_



- At the Sign-On menu, enter your mainframe USER ID and PASSWORD. Use the TAB key to move from field to field. Press ENTER when completed, and a blank screen will appear.



WELCOME TO CICS/TS 3.1.0 PROD CICPTOR

Type your userid and password, then press ENTER:

```
Userid . . . . PITTS      Groupid . . . . _____
Password . . . . _____
Language . . . . ____
New Password . . . .
```

DFHCE3520 Please type your userid.
F3=Exit



TRANSPORTATION FIELD TRIP SYSTEM

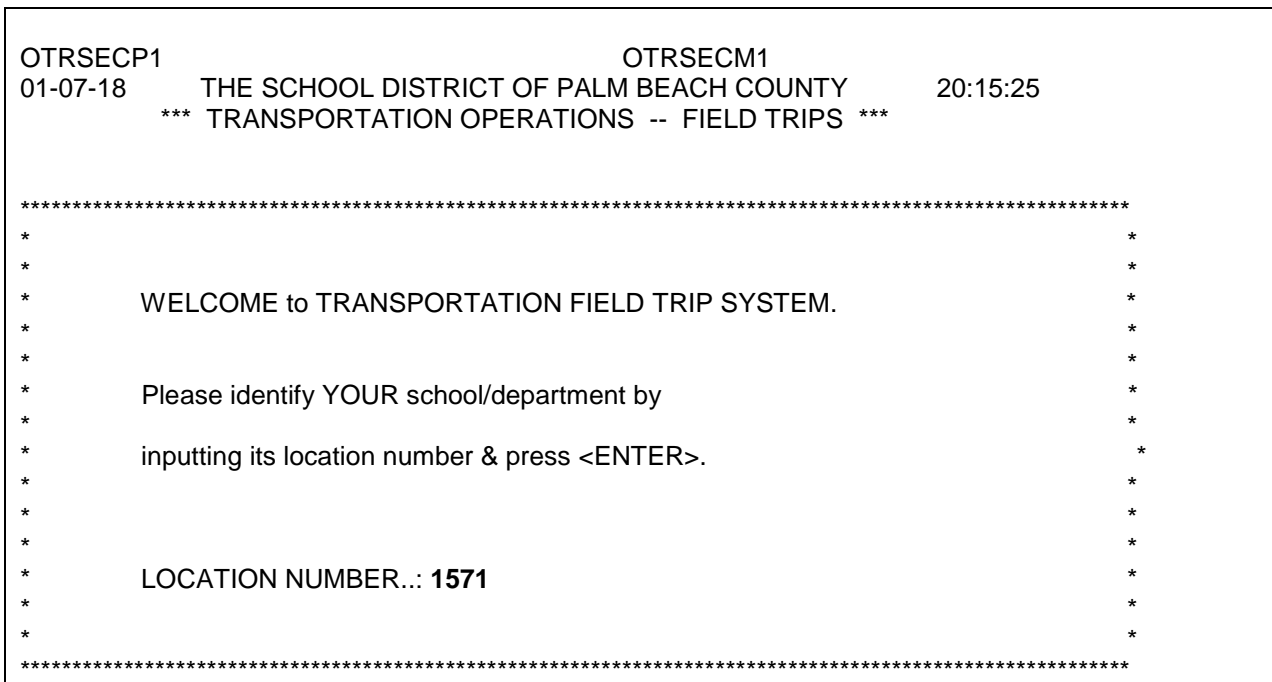
5. At the blank screen, enter TR71 to access the Field Trip program.



DFHCE3549 sign-on is complete (Language ENU).



6. Enter your school location number to begin processing your bus trip request.



TRANSPORTATION FIELD TRIP SYSTEM

7. Your user screen will be displayed. The user code TRSC-U means you are a school center with update capability. Press ENTER to access the Field Trips School Menu.

```

Page      1                               01-07-20 10:49:06

*****
*
*
*
*          USERID IS ---> PITTS
*          LOCATION IS ---> 1571
*          SEC-GROUP IS --> TR71SC-U
*
*
*
*
*****

MORE
  
```

8. Make your selection to enter or inquire in the Field Trip System (Code SU) or to browse existing bus trip tickets by ticket number (SB) or browse all your open (Code S1) or closed (S2) field trips. To view prior year activity, use the H1, H2, and H3 panels.

```

SESSION1 - EXTRA! Enterprise 2000
File Edit View Tools Session Options Help
[Icons]
OPSSCUPM ***** THE SCHOOL DISTRICT OF PALM BEACH COUNTY *****
2006-09-28 - FIELD TRIPS - SCHOOL MENU - 9:28 PM

Code Functions
-----
SU Update/Inquire Transportation Field Trips
SB Browse-Select Field Trips by Ticket Number
S1 Browse Opened Field Trips
S3 Browse Field Trips by Trip-Date
**
H1 Inquire Historical Field Trip Information
H2 Browse-Select Historical Trips by Ticket_No
H3 Browse-Select Historical Trips by Trip Date
? Help
. Terminate
-----

Code: __

Direct command...:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      help      retrn main      quit

[4B] :00.1 17/18
Connected to host 10.254.6.254 (PBG126) Page001 CAP NUM 9:29 PM
  
```

TRANSPORTATION FIELD TRIP SYSTEM

- The panel to enter a bus trip will appear. Select an action code to begin processing a new bus trip request (Action Code A) or change an existing bus trip request (Action Code C). Clear the screen completely by entering action code R, or request the next bus trip ticket number by entering Action Code N. You may view existing bus trip requests in inquiry (Action Code I) or browse mode (Action Code B). To move from field-to-field, use the TAB key.

```

SESSION1 - EXTRA! Enterprise 2000
File Edit View Tools Session Options Help

OPSSCUPO ***** THE SCHOOL DISTRICT OF PALM BEACH COUNTY ***** OPS210MA
2006-09-27 - MAINTAIN FIELD TRIP INFORMATION (SU) - 2 more >
*Action (A,B,R,I,C,N) = Panel 1_ SCHOOL Upd:
Posted Dt:
*TRIP TICKET: 0 *Trip Date: _____ *Req. Loc#: 1571 SOUTH TECH COMM
*Departure: _____ *Return Time: _____ *Dest. Loc#: _____
Nbr-of-students: 0 Grade: _____ *Start Loc#: _____
Event : _____
*Contact: _____ *Contact-PX#: _____ *Number-of-aide-needed: 0
Comment: _____

*FUND TYPE: _____ *Sub-Type required for Fund-type DF & OT _____
..... Dept Fund Func Acct Prog BMgr L-Cd AW-YR Project .....
FUND for the trip : _____
FUND-Plan-Add-Actv: _____
*Trip canceled by school: _ Dept-Apprv.: Transport.Approval:

=====
TRIP ESTIMATED COST:$ 0.00 TRIP ACTUAL COST:$ 0.00
=====

Trip Planned Additional Cost: $ 0.00
Trip Unplanned Additional Cost:$ 0.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
pref help retrn main bkwrđ frwrđ left right quit

4:00 :00.2 03/30
Connected to host 10.254.6.254 (PBG132) Page001 NUM 9:33 PM
  
```

To process a new bus trip request, enter the following information:

- **Action Code** >> Enter action code A to add a new bus trip request. Then tab twice to reach the TRIP DATE field.
- **Trip Date** >> Enter the date of the trip—you may use the MM/DD/YY format for the date and the system will automatically format the date. Use the PF1 HELP key to see a table of acceptable date values.
- **Departure** >> Enter the time of departure using military time (e.g., 11.00 = 11AM, 12.00 = noon, 13.00 = 1PM, 17.00 = 5PM, etc.).
- **Return Time** >> Enter the estimated return time using military time.
- **Destination Location** >> Enter the four-digit destination code (if known) or use the PF1 HELP key to obtain a list of destinations on file for your location. If you require set-up for a new destination, send your school number and the name, address, zip code and phone number of the requested destination to Jackie Mathis in Transportation at Jacquelyn.Mathis@palmbeachschools.org.

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- **Number of Students** >> Enter the estimated number of students and chaperones in attendance.
- **Grade Level** >> Enter the grade level of the students in attendance.
- **Purpose** >> Enter a brief explanation of the trip (e. g., name of performance, name of the event, purpose of the field trip, name of sponsor).
- **Contact** >> The name of the person that Transportation should call if there are questions about the bus trip request.
- **Contact PX** >> The district PX number for the individual named as the contact person for the trip.
- **Number of Bus Aides Needed** >> The system default is zero; if bus aides are required, enter the number needed. Generally speaking, a bus aide is required whenever schools request a wheelchair or ESE bus.
- **Comment** >> Use this field to make special requests (wheelchair bus, requests for extra stops, requests for an empty bus to transport band instruments, etc.) or to communicate any special information to Transportation.
- **Fund Type** >> Enter the fund type indicator. To obtain a list of acceptable values, press the PF1 HELP key. For detailed explanations about the Fund Type codes, consult the appropriate heading elsewhere in this documentation packet.
- **Sub-Type** >> Required for fund type DF (District Fine Arts) only; press the PF1 HELP key to obtain a list of acceptable values.
- **Accounting Fund** >> If required, enter the necessary account dimensions to complete the accounting information. Some fund types insert the entire accounting strip, while others require the user to enter some of the data elements. Consult the account coding grid on page 20 of this packet for a more complete explanation of the funding options.

Press the ENTER key to update your bus trip request. If all information was correctly entered, a trip ticket number will be assigned by the system and a message will appear at the bottom of the screen stating that the object was successfully added. The next few pages show several examples of successful bus trip requests.

TRANSPORTATION FIELD TRIP SYSTEM

ACCOUNT TYPE SI – School Internal Accounts

This bus trip ticket was successfully entered into the Transportation Field Trip System. The requestor used FUND TYPE code SI, which designates the trip as payable from the school Internal Accounts. As part of this particular trip, there was an additional planned activity (lunch at Rosalita's Restaurant) and the school has decided to fund the additional driver time and mileage associated with this extra activity from the school internal accounts. Generally, most schools will fund the additional planned activity from the school internal funds, although this will not always be true. A message will appear in the lower left-hand corner of the screen confirming the acceptance of the request.

```
SESSION1 - EXTRA! Enterprise 2000
File Edit View Tools Session Options Help
[Icons]
OPSSCUPO ***** THE SCHOOL DISTRICT OF PALM BEACH COUNTY ***** OPS210MA
2006-09-27 - MAINTAIN FIELD TRIP INFORMATION (SU) - 2 more >
*Action (A,B,R,I,C,N) C Panel 1_ SCHOOL Upd: 2006-09-27 PITTS
Posted Dt:
*TRIP TICKET: 20420 *Trip Date: 2007-06-10 *Req. Loc#: 1571 SOUTH TECH COMM
*Departure: 09:30:00 *Return Time: 13:00:00 *Dest. Loc#: 1877 BOYNTON BEACH M
Nbr-of-students: 60 Grade: 9_____ *Start Loc#: 1571 SOUTH TECH COMM
Event : FIELD TRIP TO THE BOYNTON MALL FOR FCAT REWARD_____
*Contact: SUSAN SIMCINA_ *Contact-PX#: 48257 *Number-of-aide-needed: 0
Comment: AIR CONDITIONED BUS - LUNCH AT ROSALITA'S_____
.....
*FUND TYPE: SI *Sub-Type required for Fund-type DF & OT _____
..... Dept Fund Func Acct Prog BMgr L-Cd AW-YR Project .....
FUND for the trip : 1571 1801 9810 579200 9470 1571 000 ___ s1571_____
FUND-Plan-Add-Actv: 1571 1801 9810 579200 9470 1571 000 ___ s1571_____
*Trip canceled by school: _ Dept-Apprv.: Transport.Approval:
=====
TRIP ESTIMATED COST:$ 0.00 TRIP ACTUAL COST:$ 0.00
=====
Trip Planned Additional Cost: $ 0.00
Trip Unplanned Additional Cost:$ 0.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
pref help retrn main bkwr frwr left right quit
Invalid Budget Manager. Try again please
[Icons] :00.5 14/50
Connected to host 10.254.6.254 (PBG132) Page001 CAP NUM 8:57 PM
```

Schools will be able to print out their internal accounts bus trip invoices from the A/R & Billing module of PeopleSoft. They can also print a statement listing all bus trip charges that were coded to FUND TYPE SI. These charges must be paid promptly by issuing a check from the school's internal accounts made payable to the School District of Palm Beach County. The bus trip ticket number and an invoice number will appear on the statement, and schools should reference the invoice number when the payment is made. To inquire on a bus trip and see the detail of the completed charges, use the SB (School-Browse) option on the main menu to view all bus trip tickets or use the SU (School Update) option to inquire (ACTION I) or view the detail on a specific ticket number.

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ACCOUNT TYPE DF – District Fine Arts

The bus trip ticket below was successfully entered, and has been routed to the District Fine Arts program for approval and funding. Since the ACCOUNT TYPE DF was used, we were required to designate whether our trip is funded by the district Fine Arts budget or by the Kravis Center. In our example, the district fine arts budget will be funding the transportation costs because we specified SUB-TYPE code DISTRICT. The system “knows” the default setting for the fine arts trips, so the school had nothing to enter for the bus trip accounting information. If there had been a planned additional activity associated with this trip, it could have been funded by the school internal accounts by entering the correct account information in the ADDITIONAL PLANNED ACTIVITY account coding on the screen. For fine arts trips with UNPLANNED ADDITIONAL ACTIVITIES, the Transportation Department will automatically charge any extra driver’s time and mileage to the school’s Internal Accounts.

```
SESSION1 - EXTRA! Enterprise 2000
File Edit View Tools Session Options Help
OPSSCUPO ***** THE SCHOOL DISTRICT OF PALM BEACH COUNTY ***** OPS210MA
2006-09-27 - MAINTAIN FIELD TRIP INFORMATION (SU) - 2 more >
*Action (A,B,R,I,C,N) C Panel 1_ SCHOOL Upd: 2006-09-27 PITTS
Posted Dt:
*TRIP TICKET: 20420 *Trip Date: 2007-06-10 *Req. Loc#: 1571 SOUTH TECH COMM
*Departure: 04.30.00 *Return Time: 23.00.00 *Dest. Loc#: 7901 NORTON ART GALL
Nbr-of-students: 60 Grade: 9 *Start Loc#: 1571 SOUTH TECH COMM
Event : FIELD TRIP TO THE NORTON ART GALLERY TO SEE PICASSO EXHIBIT
*Contact: SUSAN SIMCINA *Contact-PX#: 48257 *Number-of-aide-needed: 0
Comment: AIR CONDITIONED BUS
.....
*FUND TYPE: DF *Sub-Type required for Fund-type DF & OT DISTRICT
..... Dept Fund Func Acct Prog BMgr L-Cd AW-YR Project .....
FUND for the trip : 9039 1000 7803 579200 9470 9039 000
FUND-Plan-Add-Actv:
*Trip canceled by school: _ Dept-Apprv.: Transport.Approval:
=====
TRIP ESTIMATED COST:$ 0.00 TRIP ACTUAL COST:$ 0.00
-----
Trip Planned Additional Cost: $ 0.00
Trip Unplanned Additional Cost:$ 0.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
pref help retrn main bkwrđ frwrđ left right quit
Object 20420 modified successfully
4B :00.1 05/35
Connected to host 10.254.6.254 (PBG132) Page001 CAP NUM 8:51 PM
```

Bus Trip Tickets for Fine Arts buses must be entered at least two weeks prior to the date of the trip. *Always include the name of the performance as it is listed in the bulletin in the EVENT field.*

To cancel a trip prior to its completion, enter a “Y” in the Trip Canceled by School field and place a phone call to the appropriate transportation compound. In addition, contact Tom Pearson at PX 48161 with bus trip cancellations or for general questions about fine arts transportation. The cost of trip cancellations and extra activities will be billed to the school’s internal accounts. Schools will be charged for two hours of driver’s time if a trip is canceled after the bus leaves the compound. If the trip is denied for budgetary or other reasons, the school will be required to enter a new bus trip ticket and specify a different Fund Type on the new bus trip ticket.

TRANSPORTATION FIELD TRIP SYSTEM

ACCOUNT TYPE DM – District Multicultural Department

This bus trip request will be routed to the District Multicultural Department (FUND TYPE DM) where it will be reviewed for approval by Multicultural staff. Schools using Fund Type DM should contact Multicultural for funding information. Phone Yvonne Elliott (PX 48347) for assistance with Multicultural-funded bus trips. The Transportation Department will not assign a bus and driver to the ticket unless it receives clearance from Multicultural district staff. In our example, there was an ADDITIONAL PLANNED ACTIVITY (lunch at Don Ramon's) and any additional mileage and driver's time on our sample trip will be charged to the school's Internal Accounts, as designated on the funding line for Additional Planned Activity.

```
SESSION1 - EXTRA! Enterprise 2000
File Edit View Tools Session Options Help
OPSSCUPO ***** THE SCHOOL DISTRICT OF PALM BEACH COUNTY ***** OPS210MA
2006-09-27 - MAINTAIN FIELD TRIP INFORMATION (SU) - 2 more >
*Action (A,B,R,I,C,N) C Panel 1_ SCHOOL Upd: 2006-09-27 PITTS
Posted Dt:
*TRIP TICKET: 20420 *Trip Date: 2007-06-10 *Req. Loc#: 1571 SOUTH TECH COMM
*Departure: 09.30.00 *Return Time: 12.30.00 *Dest. Loc#: 8399 PALM BEACH MEDI
Nbr-of-students: 30 Grade: 10_____ *Start Loc#: 1571 SOUTH TECH COMM
Event : FIELD TRIP TO PALM BEACH MEDIA GROUP TO SEE GRAPHIC DESIGN_____
*Contact: SUSAN SIMCINA_ *Contact-PX#: 48257 *Number-of-aide-needed: 0
Comment: LUNCH ON THE WAY BACK TO SCHOOL AT DON RAMON'S_____
.....
*FUND TYPE: DM *Sub-Type required for Fund-type DF & OT _____
.....
Fund for the trip : 9083 4382 7803 579200 6551 9083 000 2007 s1571_____
Fund-Plan-Add-Actv: 1571 1801 9810 579200 9470 1571 000 _____ s1571_____
*Trip canceled by school: _ Dept-Apprv.: Transport.Approval:
=====
TRIP ESTIMATED COST:$ 0.00 TRIP ACTUAL COST:$ 0.00
-----
Trip Planned Additional Cost: $ 0.00
Trip Unplanned Additional Cost:$ 0.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
pref help retrn main bkwrwd frwrwd left right quit
Object 20420 modified successfully
4B :00.1 05/35
Connected to host 10.254.6.254 (PBG132) Page001 CAP NUM 9:08 PM
```

After the school enters the bus trip request, it will be reviewed by the district Multicultural staff. If approved, the school will see the letter “Y” (for YES) in the Dept-Apprv field. If Multicultural is unable to fund the cost of the bus transportation, they will call the contact person listed on the bus trip request to arrange for alternate funding or possible cancellation of the trip.

To cancel a trip prior to its completion, enter a “Y” in the Trip Canceled by School field and place a phone call to the appropriate transportation compound. Schools will be charged for two hours of driver's time if cancellations are called in after the bus leaves the compound, and the coding for those charges will default to the school's Internal Accounts funding strip.

TRANSPORTATION FIELD TRIP SYSTEM

ACCOUNT TYPE SR – School Operating Budget

This bus trip request will be routed directly to the Transportation Department since it was successfully coded to FUND TYPE SR. For this type of bus trip, the system “knows” the proper chartfields to use and the default account strip is used. If there was an ADDITIONAL PLANNED ACTIVITY any additional mileage or driver’s time associated with that excursion could have been charged to either the school’s Internal Accounts or the school operating budget, depending on the funding designated on the Additional Planned Activity funding line. In order to use this account type, schools must have sufficient funds budgeted to cover the cost of the trip.

```
SESSION1 - EXTRA! Enterprise 2000
File Edit View Tools Session Options Help
OPSSCUPO ***** THE SCHOOL DISTRICT OF PALM BEACH COUNTY ***** OPS210MA
2006-09-27 - MAINTAIN FIELD TRIP INFORMATION (SU) - 2 more >
*Action (A,B,R,I,C,N) C Panel 1_ SCHOOL Upd: 2006-09-27 PITTS
Posted Dt:
*TRIP TICKET: 20420 *Trip Date: 2007-06-10 *Req. Loc#: 1571 SOUTH TECH COMM
*Departure: 09.30.00 *Return Time: 13.30.00 *Dest. Loc#: 7968 LOXAHATCHEE REF
Nbr-of-students: 60 Grade: 11_____ *Start Loc#: 1571 SOUTH TECH COMM
Event : FIELD TRIP TO SEE FLORIDA NATIVE ANIMALS IN THEIR NATURAL HABITAT_____
*Contact: SUSAN SIMCINA_ *Contact-PX#: 48257 *Number-of-aide-needed: 0
Comment: PLEASE SEND AIR CONDITIONED BUS_____
.....
*FUND TYPE: SR *Sub-Type required for Fund-type DF & OT _____
..... Dept Fund Func Acct Prog BMgr L-Cd AW-YR Project .....
FUND for the trip : 1571 1000 7803 579200 0000 9083 000 ___ s1571_____
FUND-Plan-Add-Actv: _____
*Trip canceled by school: _ Dept-Apprv.: Transport.Approval:
=====
TRIP ESTIMATED COST:$ 0.00 TRIP ACTUAL COST:$ 0.00
-----
Trip Planned Additional Cost: $ 0.00
Trip Unplanned Additional Cost:$ 0.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
pref help retrn main bkwrfd frwrfd left right quit
Object 20420 modified successfully
4B :00.3 14/48
Connected to host 10.254.6.254 (PBG132) Page001 CAP NUM 9:11 PM
```

To cancel a trip prior to its completion, enter a “Y” in the Trip Canceled by School field and place a phone call to the appropriate transportation compound. Schools will be charged for two hours of driver’s time if cancellations are called in after the bus leaves the compound, and the coding for those charges will default to the school’s Internal Accounts funding strip.

TRANSPORTATION FIELD TRIP SYSTEM

ACCOUNT TYPE OR – Orientation Bus Trips

Sometimes a host school will pay for a trip from another district school. This is most common when a host middle school invites the fifth graders from their feeder elementary schools to tour the campus in preparation for their move from elementary to middle school. High schools sometimes do this for the students from their feeder middle schools. It is important for both schools to have an understanding of the details of the trip and a full understanding of the financing arrangements for the trip. **NEVER USE ACCOUNT TYPE OR UNLESS THE HOST SCHOOL HAS AGREED TO PAY FOR THE BUS TRIP.**

```
SESSION1 - EXTRA! Enterprise 2000
File Edit View Tools Session Options Help
[Icons]
OPSSCUPO ***** THE SCHOOL DISTRICT OF PALM BEACH COUNTY ***** OPS210MA
2006-09-27 - MAINTAIN FIELD TRIP INFORMATION (SU) - 2 more >
*Action (A,B,R,I,C,N) C Panel 1_ SCHOOL Upd: 2006-09-27 PITTS
Posted Dt:
*TRIP TICKET: 20420 *Trip Date: 2007-06-10 *Req. Loc#: 1571 SOUTH TECH COMM
*Departure: 15710:00 *Return Time: 11:30:00 *Dest. Loc#: 8099 WORK FORCE DEVE
Nbr-of-students: 30 Grade: 12_____ *Start Loc#: 1571 SOUTH TECH COMM
Event : VOCATIONAL STUDENTS WERE INVITED TO WORKFORCE DEVELOPMENT CENTER_____
*Contact: SUSAN SIMCINA_ *Contact-PX#: 48257 *Number-of-aide-needed: 0
Comment: PLEASE SEND AIR CONDITIONED BUS_____
.....
*FUND TYPE: OR *Sub-Type required for Fund-type DF & OT _____
..... Dept Fund Func Acct Prog BMgr L-Cd AW-YR Project .....
FUND for the trip : 8099 1801 9810 579200 0000 8099 000 ___ s8099_____
FUND-Plan-Add-Actv: _____
*Trip canceled by school: _ Dept-Apprv.: Transport.Approval:
=====
TRIP ESTIMATED COST:$ 0.00 TRIP ACTUAL COST:$ 0.00
-----
Trip Planned Additional Cost: $ 0.00
Trip Unplanned Additional Cost:$ 0.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
pref help retrn main bkwrfd frwrd left right quit
Invalid FUND TYPE - Press F1 for Help
4B :00.1 07/33
Connected to host 10.254.6.254 (PBG132) Page001 CAP NUM 9:27 PM
```

In our example, the students were traveling FROM South Tech TO the Work Force Development Center at the Work Force Development Center's expense. This trip did not exist in the Trip Destination database for South Tech, so prior to arranging the trip, they contacted Transportation to arrange for a new destination code.

To cancel a trip prior to its completion, enter a "Y" in the Trip Canceled by School field and place a phone call to the appropriate transportation compound. Schools will be charged for two hours of driver's time if a trip is cancelled after the bus leaves the compound, and unless otherwise designated, the coding for those charges will default to the school's Internal Accounts funding strip.

TRANSPORTATION FIELD TRIP SYSTEM

ACCOUNT TYPE OT – Outside Funding

Sometimes an outside organization offers to pay for a bus trip for a special school event. When this happens, the school should contact Marysue Bean in Accounting at PX 48264 to see if the organization has been established as a customer in the PeopleSoft Accounts Receivable and Billing system. The organization will need a project number (S9XXX) in order to receive a bill for the transportation charges, and a list of the current organizations is included on page 21 of this booklet. Marysue will ask for a copy of the letter or other notice from the organization to document their agreement to pay for the trip costs in case there is a question about the charges.

```

SESSION1 - EXTRA! Enterprise 2000
File Edit View Tools Session Options Help
[Icons]
OPSSCUPO ***** THE SCHOOL DISTRICT OF PALM BEACH COUNTY ***** OPS210MA
2006-09-28 - MAINTAIN FIELD TRIP INFORMATION (SU) - 2 more >
*Action (A,B,R,I,C,N) A Panel 1_ SCHOOL Upd: 2006-09-28 PITTS
Posted Dt:
*TRIP TICKET: 20451 *Trip Date: 2009-10-07 *Req. Loc#: 1571 SOUTH TECH COMM
*Departure: 10.00.00 *Return Time: 13.30.00 *Dest. Loc#: 7968 LOXAHATCHEE REF
Nbr-of-students: 52 Grade: 10_____ *Start Loc#: 1571 SOUTH TECH COMM
Event : ENVIRONMENTAL STUDY OF NATIVE HABITATS_____
*Contact: SUSAN SIMCINA_ *Contact-PX#: 48257 *Number-of-aide-needed: 0
Comment: SEND AIR CONDITIONED BUSES, PLEASE!_____
.....
*FUND TYPE: OT *Sub-Type required for Fund-type DF --> _____
..... Dept Fund Func Acct Prog BMgr L-Cd AW-YR Project .....
FUND for the trip : 9320 1000 9110 579200 9470 9320 000 ___ s9483_____
FUND-Plan-Add-Actv: _____
*Trip canceled by school: _ Dept-Apprv.: Transport.Approval:
=====
TRIP ESTIMATED COST:$ 0.00 TRIP ACTUAL COST:$ 0.00
-----
Trip Planned Additional Cost: $ 0.00
Trip Unplanned Additional Cost:$ 0.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
pref help retrn main bkwrfd frwr left right quit
Object 20451 added successfully
4B :00.1 05/35
Connected to host 10.254.6.254 (PBG126) Page001 CAP NUM 9:56 PM

```

To cancel a trip prior to its completion, enter a “Y” in the Trip Canceled by School field and place a phone call to the appropriate transportation compound. Schools will be charged for two hours of driver’s time if a trip is cancelled after the bus leaves the compound, and unless otherwise designated, the coding for those charges will default to the school’s Internal Accounts funding strip.

TRANSPORTATION FIELD TRIP SYSTEM

TRANSPORTATION FIELD TRIP QUESTIONS AND ANSWERS

I tried to sign-on to the TR71 panel and couldn't get in. Why not?

Users must request access to the system by completing a Mainframe Access Form (PBSD 1362). We advise all schools to have two users with update access to the system, but inquiry access is also an available option.

Is my school required to use the District Bus Trip Ticket?

No, this is an internal form that remains at the school, and use of the form is optional. It provides a convenient method for gathering all the pieces of information that are required to enter a transaction into the Transportation Field Trip system, and it gives the Principal the opportunity to approve the bus reservation in advance of the trip. Schools will be responsible for deciding what kind of paperwork, if any, is used to facilitate the entry of bus trips into the on-line system. Most principals or activity directors will want to be "in the loop" before these plans are made, so talk with your principal to see what will work best in your particular situation.

Is the Bus Trip Ticket form available on Omnifill?

Yes, it may be downloaded from the District's FORMS website, form PBSD1900.

Can I enter part of the information and leave the cost codes blank for others to complete?

There is no such thing as a "partially-completed" bus trip request. Invalid entries will be discarded by the system, and will have to be re-entered. This is one reason we recommend the use of the District Bus Trip Ticket form—it simplifies the entry of data into the computer, and assures that all pertinent information is provided to the person responsible for requesting buses in the on-line system.

I notice there is a field at the top of the screen that shows a "posted date". What does that date mean?

Charges for bus trips will be uploaded into PeopleSoft once a week. The date the transactions are posted to the PeopleSoft system is captured in this field to indicate the date the trip was posted to the accounting system.

What information is contained in the "UPD" field in the upper right-hand corner of the screen?

That field captures the date and mainframe ID of the person that most recently saved the bus trip request. The system date and the User ID are combined in this field.

How can I find out which destinations are set up in the system for my school?

When you enter a bus trip request and reach the DESTINATION LOCATION# field, press the PF1 HELP key to view a list of all your established destinations. However, you are not restricted to the established destinations in the table. You can request a new destination code by sending the name, address, zip code, and phone number of the destination to Jackie Mathis (JacquelynMathis@palmbeachschools.org). Include your school name and number when requesting a destination code.

TRANSPORTATION FIELD TRIP SYSTEM

How long will it normally take for Transportation to set up a new destination code code?

Transportation is committed to the success of the bus trip system. Requests received by noon each business day will usually be processed by the following business day. Please provide the following information to assist in the set-up of new destination codes:

- The name and address of the departure point (starting location)—if the starting point is your school, include your four-digit school number
- The full name, address, and phone number of the destination point (ending location), including zip code
- The name of the requesting school and the PX of the school contact person

The Transportation Department will determine the mileage and add it to the destination database. As you can imagine, this is one huge database!

I was trying to enter the trip times and noticed there is no indicator for AM or PM. How do I make that designation when completing the screen?

The departure and return times are based on a 24-hour clock, a concept commonly referred to as “military time”. The day begins at 12:01AM, and the first twelve hours of the day would be entered as 09.00 for 9AM, 11.00 for 11AM, until you reach one o'clock in the afternoon. That becomes 13.00 hours, 2PM converts to 14.00 hours, and so forth, until midnight, which is 24.00 hours (the twenty fourth hour of the 24-hour day clock).

I have a big group going on a trip, and it will take more than one bus. Should I complete multiple bus trip tickets in the on-line system?

No, that usually isn't necessary. The Transportation Department will provide enough buses to accommodate all the students you've estimated on the trip ticket. The standard buses have seating for 77 passengers, and Transportation will take care of seeing that every passenger shown on the bus trip ticket gets a seat. If you have a special situation—if you need a wheelchair bus, or if you need an empty bus to haul all the band's musical instruments—make a notation to that effect in the COMMENTS line of the bus trip ticket to alert Transportation that there are special circumstances. The only time you will need to enter a separate ticket is when you have two different fund types for the same trip (such as one bus with fund type SI and one bus with fund type DM).

I'm not sure about those fund types. What's the purpose of using them?

Not all bus trips are paid from the same source, and the use of these codes will help schools get the funding correct. The funding decision will have to be made BEFORE the bus is lined up—not afterwards. Schools must specify a payment method when the bus trip is entered into the on-line system.

Can I have a list of exactly what account dimensions are defined by those fund type codes?

Yes, we've included a detailed list on page 20 of this packet. And if you can't remember which fund types are available, place your cursor in the FUND TYPE field and press the PF1 HELP key. All established fund type codes will be displayed.

TRANSPORTATION FIELD TRIP SYSTEM

What is a sub-type, and when do I have to use it?

The sub-type codes are used only when requesting buses for authorized Fine Arts or Science field trips. The band, chorus, and visual arts teachers receive information at the beginning of each school year outlining the requirements for accessing these Fine Arts transportation allocations. The trips are intended for specific grade levels, dates, and destinations as outlined in Bulletin # P-13995 dated September 16, 2011. Under an arrangement with the Kravis Center, the district is permitted to bill some of the transportation costs for attending specific performances directly to the Kravis Center—those trips will be coded to fund type DF, sub-type KRAVIS. In addition, the district has established limited funding for transporting students to special fine arts and science enrichment activities, and those bus trips will be coded to fund type DF, sub-type DISTRICT.

What if an outside agency wants to provide student transportation for special events or enrichment?

The District welcomes these agencies and appreciates their generosity. They should contact Marysue Bean in Accounting at 434-8264 to make billing arrangements and to be added as a customer in the PeopleSoft Accounts Receivable system. In the past, Junior Achievement and Pine Jog Center have provided bus transportation for some of our students. These bus trips will be entered using Fund Type OT and the outside agency's customer number (S9XXX), which will be entered in the Project chartfield on the bus trip screen. A current list of Outside Agencies is on page 21 of this packet.

I notice that once Transportation processes my request, some dollar amounts appear at the bottom of the screen. What are estimated costs, trip planned additional costs, and trip unplanned additional costs?

The estimated cost is built into the database, and will be calculated for every trip that is taken based on the travel time entered on the trip ticket and the estimated mileage entered for each destination code. Actual costs may vary from the estimate depending on the actual trip time and the actual mileage. If you plan additional time and additional mileage as part of your trip, you'll have the flexibility to specify where those additional dollars should be charged by specifying an account strip on the field trip panel. Schools will be billed additional fees for unplanned excursions, and those unplanned expenditures will be automatically billed to the school Internal Accounts.

If we need to change a bus trip once it has been processed by the Transportation Department, how can we make the change?

Place a phone call to the appropriate transportation compound. The phone number for each compound is listed below:

Central Area Transportation Compound	PX 56509
North Area Transportation Compound	PX 50055
East Area Transportation Compound	PX 58325
West Central (RPB) Transportation Compound	PX 79083
South Area Transportation Compound	PX 59212
West Area Transportation Compound	PX 42127

Changes to travel dates and times or changes to the number of students may result in changes to the driver assignments and may also result in changes to the estimated cost calculations.

TRANSPORTATION FIELD TRIP SYSTEM

When the driver comes to the school, will he/she still complete a bus trip ticket showing actual hours and miles traveled? Will someone be asked to sign the bus trip ticket?

Yes, that part of the process is still in place. The driver will have a printed copy of the bus trip reservation and will log the mileage and time spent on the trip. The times listed will include one-half hour of travel time to school and one-half hour of travel time back to the compound. The trip sponsor will be asked to confirm the trip times by signing the bus trip reservation at the conclusion of the bus trip.

If we need to cancel a bus trip, how can I advise Transportation of the cancellation and avoid cancellation fees?

To cancel a trip prior to its completion, enter a "Y" in the Trip Canceled by School field place a phone call to the appropriate transportation compound. The phone number for each compound is listed below:

Central Area Transportation Compound	PX 56509
North Area Transportation Compound	PX 50055
East Area Transportation Compound	PX 58325
West Central (RPB) Transportation Compound	PX 79083
South Area Transportation Compound	PX 59212
West Area Transportation Compound	PX 42127

Schools will be charged for two hours of driver's time if a trip is cancelled after the bus leaves the compound, and the coding for those charges will default to the school's Internal Accounts funding strip.

Once a trip has been completed and posted to the accounting system, who can I call for assistance if the funding needs to be changed?

- If the charge was invoiced through internal accounts, contact Marysue Bean in Accounting at PX 48264.
- If the charge was coded to a budget account strip, contact Karen Miller in Accounting at PX 48693.

Who can I call if I need help entering information into the system?

You can always call your Transportation Compound for assistance. The next point of contact will be Accounting Services/Financial Applications. A phone list is included on page 23 of this packet to help you get assistance when you need it.

TRANSPORTATION FIELD TRIP SYSTEM

ACCOUNT CODING FOR FUND TYPE CODES

USED TO ASSIGN ACCOUNT STRIPS FOR STANDARD TRIP COSTS

FUND TYPE	SUB TYPE	DESCRIPTION	DEPT	FUND	FUNC	ACCNT	PROG	BUD MGR	LOC CODE	AWARD YEAR	PROJ
SR		SCHOOL OPERATING BUDGET	XXXX	1000	7803	579200	0000	XXXX	000		
SA		SACC	XXXX	1301	9110	579200	0000	XXXX	000		
SI		SCHOOL INTERNAL ACCOUNTS	XXXX	1801	9810	579200	9470	XXXX	000		SXXXX
SG		SCHOOL GRANTS	XXXX	FUND	FUNC	579200	PROG	BMGR	000	AWYR	
DF	DISTRICT	FINE ARTS-FUNDED BY DISTRICT	9088	1000	7803	579200	9987	9088	000		
DF	KRAVIS	FINE ARTS BILLED TO KRAVIS	9320	1000	9110	579200	0000	9320	000		S9477
CS		CHARTER SCHOOLS	XXXX	1801	9810	579200	0000	9333	000		SXXXX
DM		MULTICULTURAL FUNDED BY DISTRICT	9083	FUND	FUNC	579200	PROG	BMGR	000	AWYR	
OT		OUTSIDE AGENCY JR ACHIEVEMENT	9320	1000	9110	579200	0000	9320	000		S9486
OT		OUTSIDE AGENCY PINE JOG	9320	1000	9110	579200	0000	9320	000		S9480
OT		OUTSIDE AGENCY-DOLLY HAND CENTER	9320	1000	9110	579200	0000	9320	000		S9478
OT		OUTSIDE AGENCY-FUNDED (Call Accounting to set up new agency)	9320	1000	9110	579200	0000	9320	000		S9XXX
OR		ORIENTATION (Host school pays for trip—bills to their internal accounts)	Host School Dept#	1801	9810	579200	9470	Host School Dept#	000		SXXXX (S+Host Dept#)

- Where fields are left blank, skip that chartfield by tabbing past it to leave a blank.
- With the exception of blanks, the school must input the missing data elements.
- The project chartfield is used for charges that are billed to school internal accounts or charges that will be billed to outside agencies.
- Project numbers for outside agencies will be in the S9XXX numbering series.
- Fund type OR should be used by the visiting school and they should enter the bus trip request—not the host school.
- Contact Multicultural for the fund strip prior to entering a field trip using fund type DM. They have several different grants, and all have different fund strips.

TRANSPORTATION FIELD TRIP SYSTEM

School District of Palm Beach County	
Outside Agency Customer Numbers	
Project	Description
S9475	PBCC/Belle Glade
S9476	Palm Beach Community College
S9477	Kravis Center
S9478	Dolly Hand Cultural Arts Center
S9480	Pine Jog Environmental Ed Center
S9481	Palm Tran
S9483	Grassy Waters Preserve
S9484	Norton Museum of Art
S9485	Grandview Preparatory School
S9486	Jr Achievement of Palm Beaches
S9487	Mounts Botanical Gardens
S9488	Palm Beach Pops
S9489	Special Olympics of Palm Beach
S9490	South Florida Science Museum
S9491	Palm Beach County Parks & Recreation
S9492	Heath Care Dist of Palm Beach
S9493	Greater Boca Raton Beach Tax District
S9494	Florida Atlantic University
S9495	White Hat
S9496	Classroom Teachers Association
S9497	National Conference of Firemen
S9498	Police Benevolent Assoc.
S9499	Association of Educational Secretaries
S9500	Palm Beach County Sheriff Dept
S9501	Whitehall Boca Raton
S9502	Arthur R. Marshall Foundation
S9503	Communities In Schools
S9504	Florida Stage
S9505	Dr. Larry Kawa
S9506	Florida Education Technology
S9507	Board of County Commissioners
S9508	The American National Red Cross
S9509	Southwest Airlines
S9510	Life Skills Center @ West Area
S9511	Marathon of the Palm Beaches

TRANSPORTATION FIELD TRIP SYSTEM

S9512	Coalition for Independent Living
S9513	SEIU Florida Public Services
S9514	Boys Town of South Florida
S9515	Palm Beach Chamber of Commerce
S9516	Scripps Research Institute
S9517	Historical Society of Palm Beach
S9518	BankAtlantic Foundation
S9519	Old School Square
S9520	First Choice Credit Union
S9521	Harid Conservatory
S9522	Palm Beach County Sports Committee
S9524	Palm Beach County Palm Tran
S9525	FL Association for Career & Technical Education
S9526	Palm Beach County Cultural Council
S9527	Grand Teton National Park

TRANSPORTATION FIELD TRIP SYSTEM

WHO CAN YOU TURN TO FOR ASSISTANCE?

1. TRANSPORTATION DEPARTMENT

To establish new destination codes include the name and school number of the requesting location, along with the name, full address, and phone number of the destination and email or fax your request as follows:

- **Email Jackie Mathis**
Jacquelyn.Mathis@palmbeachschools.org
- For questions, contact Jackie at PX 59212

To cancel bus trips or for general inquiries about bus trips:

- | | | |
|---------------------------|-------------------------|-----------------|
| ➤ Central Area | Gloria Thompson | PX 56509 |
| ➤ North Area | Flesena Scott | PX 50055 |
| ➤ East Area | Philomena Chance | PX 58325 |
| ➤ Royal Palm Beach | Tammy Pierre | PX 79083 |
| ➤ South Area | Jackie Mathis | PX 59212 |
| ➤ West Area | Glendale Bess | PX 42127 |

2. ACCOUNTING SERVICES/FINANCIAL APPLICATIONS

For help with entering information into the system:

- | | | | |
|-------------------------|---------------------|------------------------|-----------------|
| ➤ Melanie Pitts | Manager | Melanie.Pitts@ | PX 48675 |
| ➤ Ruth Potter | North Area | Ruth.Potter@ | PX 48174 |
| ➤ Crystal Cattey | South Area | Crystal.Cattey@ | PX 48864 |
| ➤ Renee Murray | West Area | Renee.Murray@ | PX 43879 |
| ➤ Debbie Puig | Central Area | Deborah.Puig@ | PX 48257 |

3. ACCOUNTING SERVICES/FINANCIAL ACCOUNTING

For assistance with the school Internal Accounts Billing:

- | | | |
|-----------------------|----------------------|-----------------|
| ➤ Marysue Bean | Marysue.Bean@ | PX 48264 |
|-----------------------|----------------------|-----------------|
- For assistance with accounting changes and corrections:
- | | | |
|-----------------------|----------------------|-----------------|
| ➤ Karen Miller | Karen.Miller@ | PX 48693 |
|-----------------------|----------------------|-----------------|

4. DISTRICT-LEVEL FUNDING CONTACTS

- | | | |
|---------------|-----------------------|-----------------|
| Fine Arts | Tom Pearson | PX 48161 |
| Science | Wendy Spielman | PX 21152 |
| Multicultural | Yvonne Elliott | PX 48347 |

5. OUTSIDE AGENCY FUNDING OF BUS TRIPS

- | | | |
|---------------------|----------------------|-----------------|
| Marysue Bean | Marysue.Bean@ | PX 48264 |
|---------------------|----------------------|-----------------|