2019 Start of School Summit

Tuesday, June 11, 2019

Kellogg Conference Hotel at Gallaudet University

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Transportation Request Form (TRF) Workshop

Division of Student Transportation

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Start of School Summit Agenda

Time	Activity
8:30 – 9:00 a.m.	Check-in + Registration
9:00 – 9:20 a.m.	Summit Opening
9:20 – 9:30 a.m.	Break + Transition
9:30 – 11:00 a.m.	LEA POC Breakout Session #1
11:00 – 11:15 a.m.	Break + Transition
11:15 a.m. – 12:30 p.m.	LEA POC Breakout Session #1
12:30 – 1:30 p.m.	LEA Team Working Lunch + OSSE Resource Fair
1:30 – 2:45 p.m.	LEA POC Breakout Session #3
2:45 – 3:00 p.m.	Break + Transition
3:00 – 4:00pm	OSSE Staff Office Hours

Link to Test Environment

Tote Sandbox :

https://uat-dcosse.cs32.force.com/LEA/login

User ID: test_bridgespcsschool@dc.gov.uat

Password: Xxxxxxxxxxxx3

Session Agenda

Time	Activity
5 minutes	Opening + Objectives
5-10 minutes	Application Overview and Views
10 minutes	Program and Calendars
10 minutes	Managing Data
5 minutes	Transportation Rosters
10 minutes	Understanding and Creating Transportation Request Forms
5 minutes	Q + A
5 minutes	Closing + Next Steps

Session Objectives

- By the end of this session, participants will be able to…

1. Understand the Keys function of the TOTE application
   - Search and View information
   - Create Program and Calendars
2. Understand the Importance of accurate Data
   - Understand and Manage Data
   - Manage and View Student Rosters
3. Understand how to create a Transportation Request Form (TRF)
   - Create Transportation Request Form (TRF)
   - Understand the key data needed for TRF

2019 Start of School Campaign Priorities

Audience

- LEA Special Education POCs
- LEA Transportation POCs

Goal

- Provide transportation to eligible students beginning on the first day of the 2019-20 academic year

How We'll Get There

- Deploy new transportation system (TOTE 2.0)
- Development and release of unified data errors (UDEs)
- Increased communication to parents and families

What's New for Transportation POCs?

Streamlined Data Error Reporting

- OSSE DOT continues to streamline the identification of transportation data discrepancies (i.e., incorrect primary contact phone numbers and the eligible students who are missing TRFs) via the UDE report in Qlik.

Simplified Transportation Data System

- OSSE DOTs new transportation data system, TOTE 2.0, will simplify and streamline the process of submitting and updating TRFs for eligible students during the upcoming school year; the system will be rolled out to LEAs in spring 2019.

5 Things Transportation POCs Should Know

- TOTE Application Overview and Access
- Understanding the TOTE Home Screen and Views
- Creating and Editing Program and Calendars in TOTE
- Managing Data: Student Addresses and Rosters
- Submitting Transportation Request Forms in TOTE

Overview

TOTE v2.0 is a Salesforce-based case management solution designed as a one-stop-shop for all DOT transportation needs including, but not limited to:

- Transportation Request Form -TRF
- Calendar and Program updates
- Transportation Rosters
- Student Case Management

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Key Documents

- *TOTE 2.O Training Manual*
- *Quick start guide*

Overview

- How do users get access to the new TOTE application?
  - Access is not granted based on prior years access
  - Access is granted based on successful completion of training
- User training and access statistic

Data	Totals
LEAs/Schools Trained	230+
LEAs/Schools with access	214

Things to remember

- Passwords should be strong (letter, number, uppercase and lower case and symbols) and a minimum of eight characters.
- Passwords should not be shared with others
- Follow data privacy guidelines when sharing student data (i.e., 504 students)

Check for Understanding

1) What is the new TOTE platform built on?
2) What are the requirements for access to the new TOTE application?
3) What are two things you should remember?

Search and View Information in TOTE

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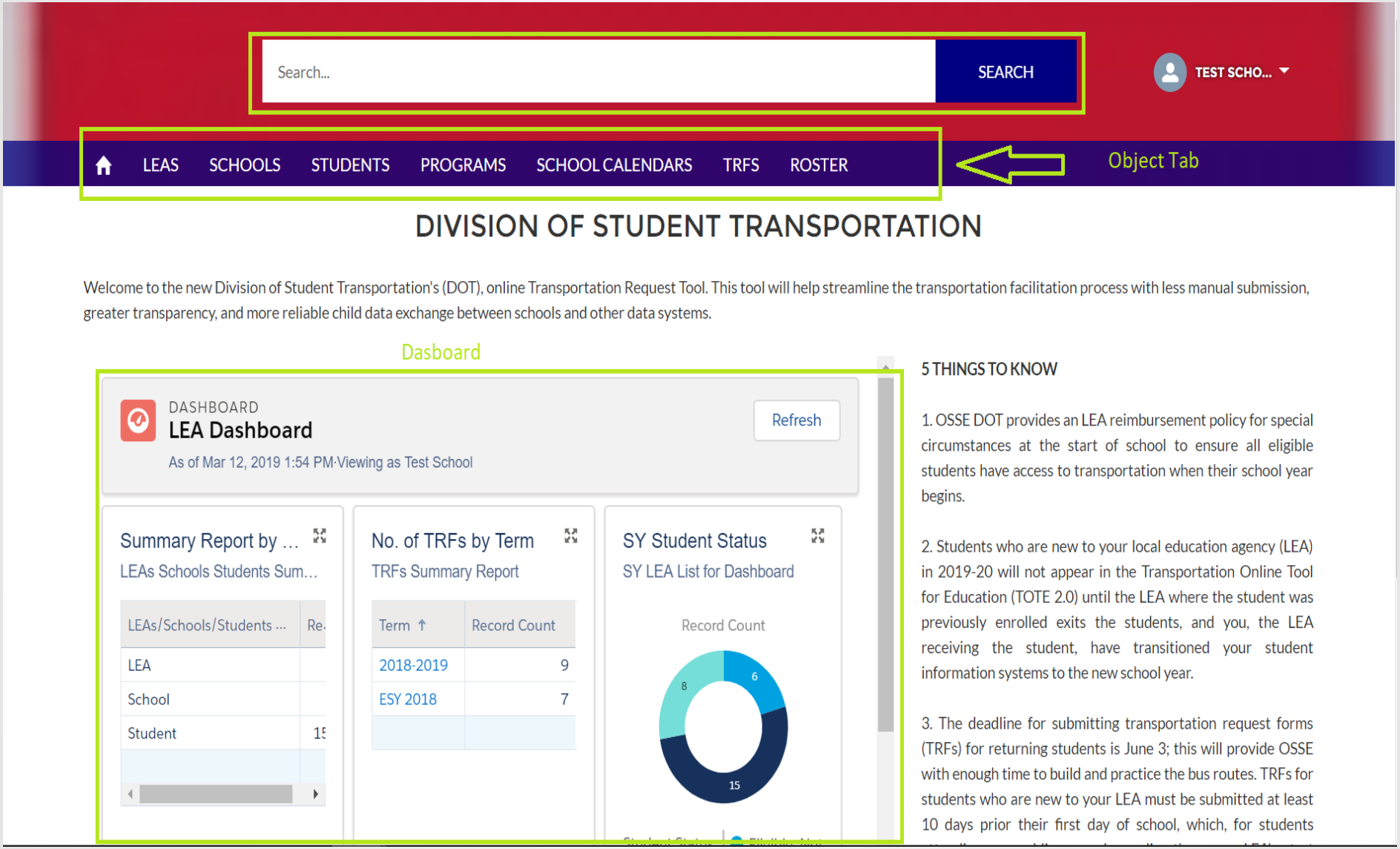
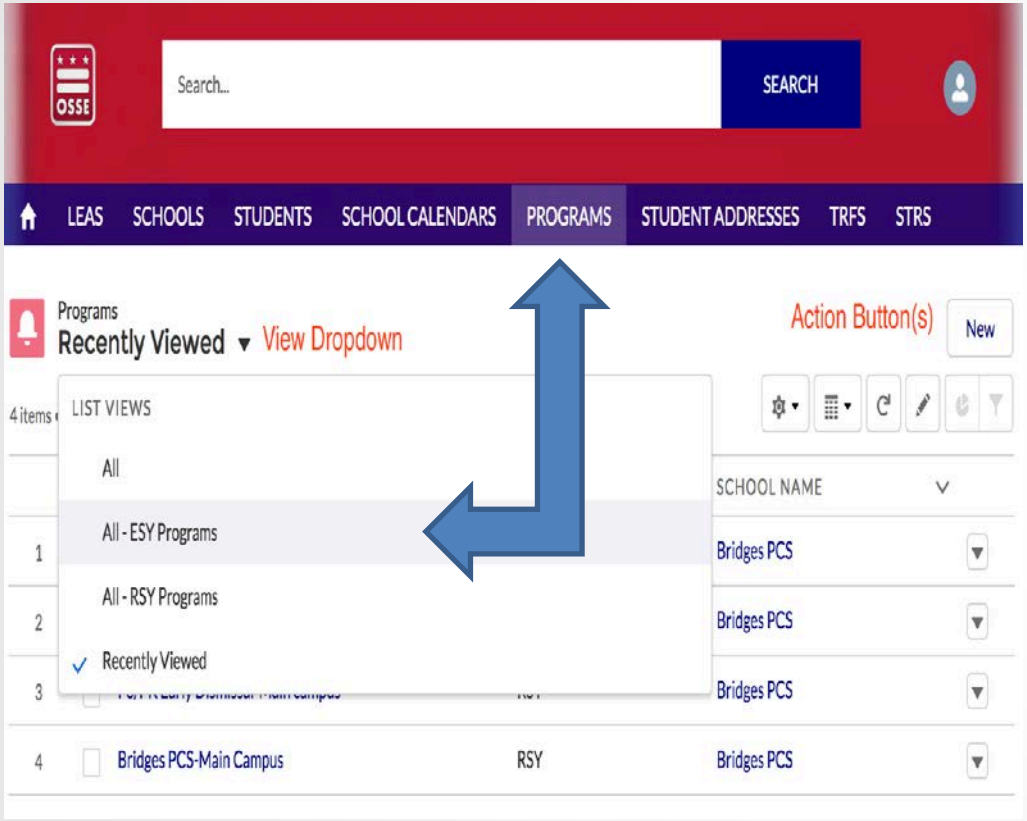
Understanding the Home Screen



Understanding the Home Screen

- **Object Tabs** – The various objects, or types of records, available to LEA Users are listed across the top, including: LEAs, Schools, Students, School Calendars, Programs, Student Addresses, TRFs (Transportation Request Forms), and STRs (Student Transportation Rosters).
- **Search Bar** – The search bar allows you to search through important fields across all the objects.
  - In the results screen, you can choose from the objects listed in the left menu bar to go directly to match within that object.
- **Dashboard** – The dashboard displays a few charts summarizing the information available to the user, including numbers of schools and key reports.

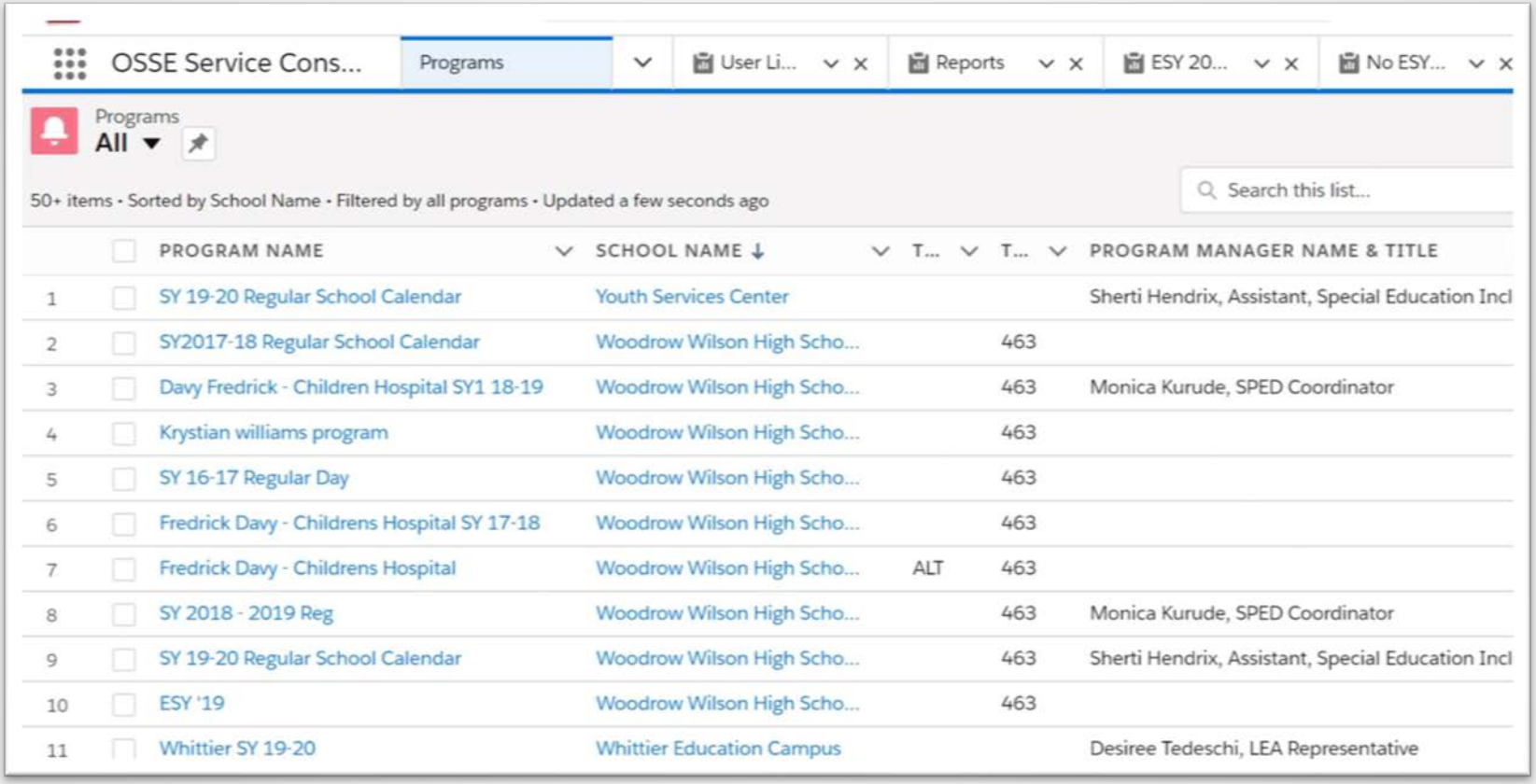
Views



Steps

- Click on any of the object tabs you would like to view, for example Programs
- The Programs page will display
  - By default the system will show recently viewed records
- To expand the List View:
  - Click the drop down arrow
- The system will show, list of predefined views,
- Select **"All – ESY Programs"**, resulting in a view of all ESY Programs associated with your LEA/School.

Views – Programs



	PROGRAM NAME	SCHOOL NAME ↓	T...	T...	PROGRAM MANAGER NAME & TITLE
1	SY 19-20 Regular School Calendar	Youth Services Center			Sherti Hendrix, Assistant, Special Education Incl
2	SY2017-18 Regular School Calendar	Woodrow Wilson High Scho...		463	
3	Davy Fredrick - Children Hospital SY1 18-19	Woodrow Wilson High Scho...		463	Monica Kurude, SPED Coordinator
4	Krystian williams program	Woodrow Wilson High Scho...		463	
5	SY 16-17 Regular Day	Woodrow Wilson High Scho...		463	
6	Fredrick Davy - Childrens Hospital SY 17-18	Woodrow Wilson High Scho...		463	
7	Fredrick Davy - Childrens Hospital	Woodrow Wilson High Scho...	ALT	463	
8	SY 2018 - 2019 Reg	Woodrow Wilson High Scho...		463	Monica Kurude, SPED Coordinator
9	SY 19-20 Regular School Calendar	Woodrow Wilson High Scho...		463	Sherti Hendrix, Assistant, Special Education Incl
10	ESY '19	Woodrow Wilson High Scho...		463	
11	Whittier SY 19-20	Whittier Education Campus			Desiree Tedeschi, LEA Representative

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Check for Understanding

1) What can I find on the new home page?
2) What are objects?
3) What will the recently viewed page display?

Create Program and Calendar

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Creating Program and Calendar

Question	Yes or No
Can a school submit a calendar without a Program?	NO
Can a school submit a TRF without a calendar or Program?	NO

- School Program and Calendar is one of prerequisite's to creating a Transportation Request Form in TOTE. Program and Calendar provide the following guidance for OSSE DOT:
  - Determining the specialized program for the student
  - Understanding the start and end time of each school
  - Determining accurate pick up and drop off times for each student
  - Understanding accurate school leave: holiday, breaks, half day, etc.

Tips for Creating Program and Calendar

- **Required fields** will have a red asterisk (*) before them. You will find that many fields will be pre-filled and do not require the user to enter the details.
- **Relationship fields** will often already be set, but when you need to set it yourself, you can start typing in the box and possible matches will populate in a list below.
- **Picklist fields** will have the same down arrow icon to see the full picklist choices as others throughout the application.
- **Date or Date/Time fields** will have calendars beside them that can be clicked to pull up a view to select the date instead of typing them in.
- **Formula fields** are not displayed in the editing view, but after save they will be shown.

Creating Program Information

There are two ways a program can be created in TOTE:

1. By selecting the Program Related Tab on the School Page
2. By selecting the New button on the Program Object page

Steps to create a Program via the Related Tab are:

- Click on the School object tab on top of the screen
- The School page, will open displaying your school Information
- Click on the Related tab, there will be several related objects
- Select the New button, next to the Program related object

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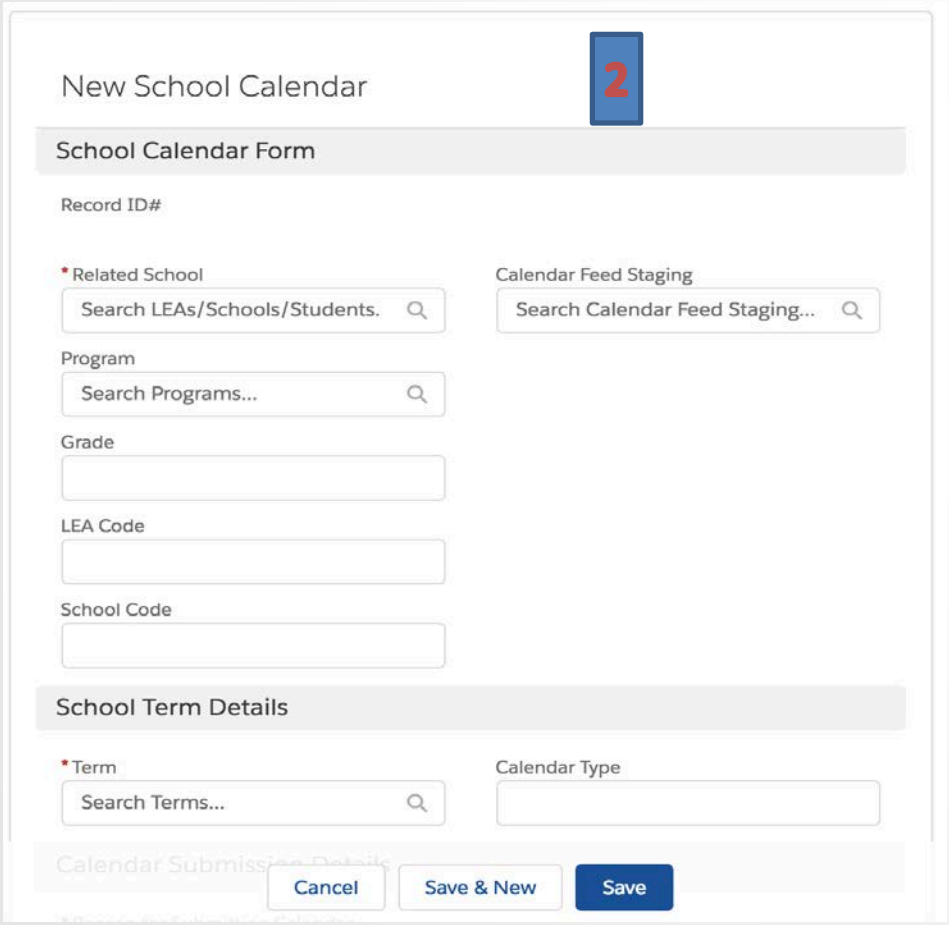
Key Notes:

1) *Not all users have permission to create or edit Program and Calendar. Some users will only have view rights, if you believe this is in error. Please contact the OSSE DOT, Data and Technology team.*
2) *Step to enter Program via the Program page*
3) *Reference page 3 in Quickstart guide*

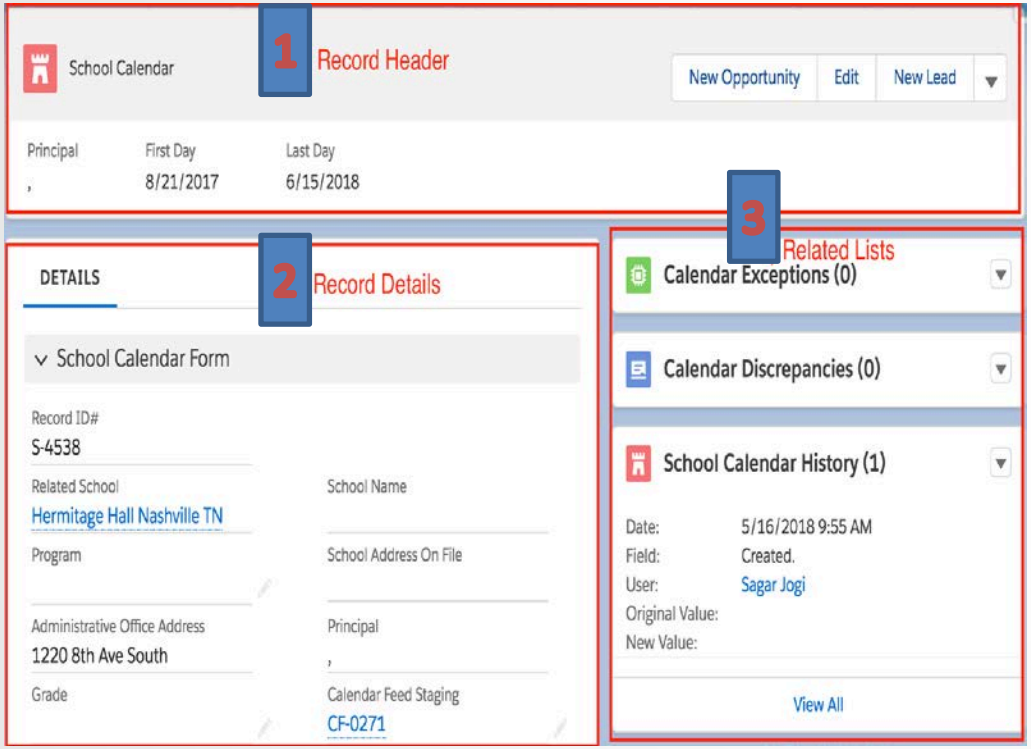
Creating School Calendar



To create a New Calendar (via the Calendar page):

- On the Object Tab, select School Calendar (1)
- Click the "New" button on the upper right-hand corner of the page
  - Note: Objects are permission based
- The "New School Calendar" page will display (2)
- Enter the following:
  - Required fields
  - Picklist fields
  - Relationship fields
- Click the Save button

Viewing School Calendar



1. **Record Header**: is located at the top of the page. The record header helps to identify what object you are viewing and attempting to edit.
2. **Record Details**: is where you will find key information pertaining to the object you are viewing.
3. **Related List**: other objects that can have multiple records associated with this single record.

Check for Understanding

1) Can a calendar be created without a program?
2) What can you see on the Calendar Page?
3) What is the difference between a Program and Calendar?

Understand and Manage Data

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Managing Data

- TOTE is the system of record for:
  - Detailed program and calendar information
  - Transportation Request Forms – TRFs
  - Transportation Roster information

- TOTE pulls data from the following OSSE systems:
  - SEDS
  - SLIMS
  - eSchoolPlus

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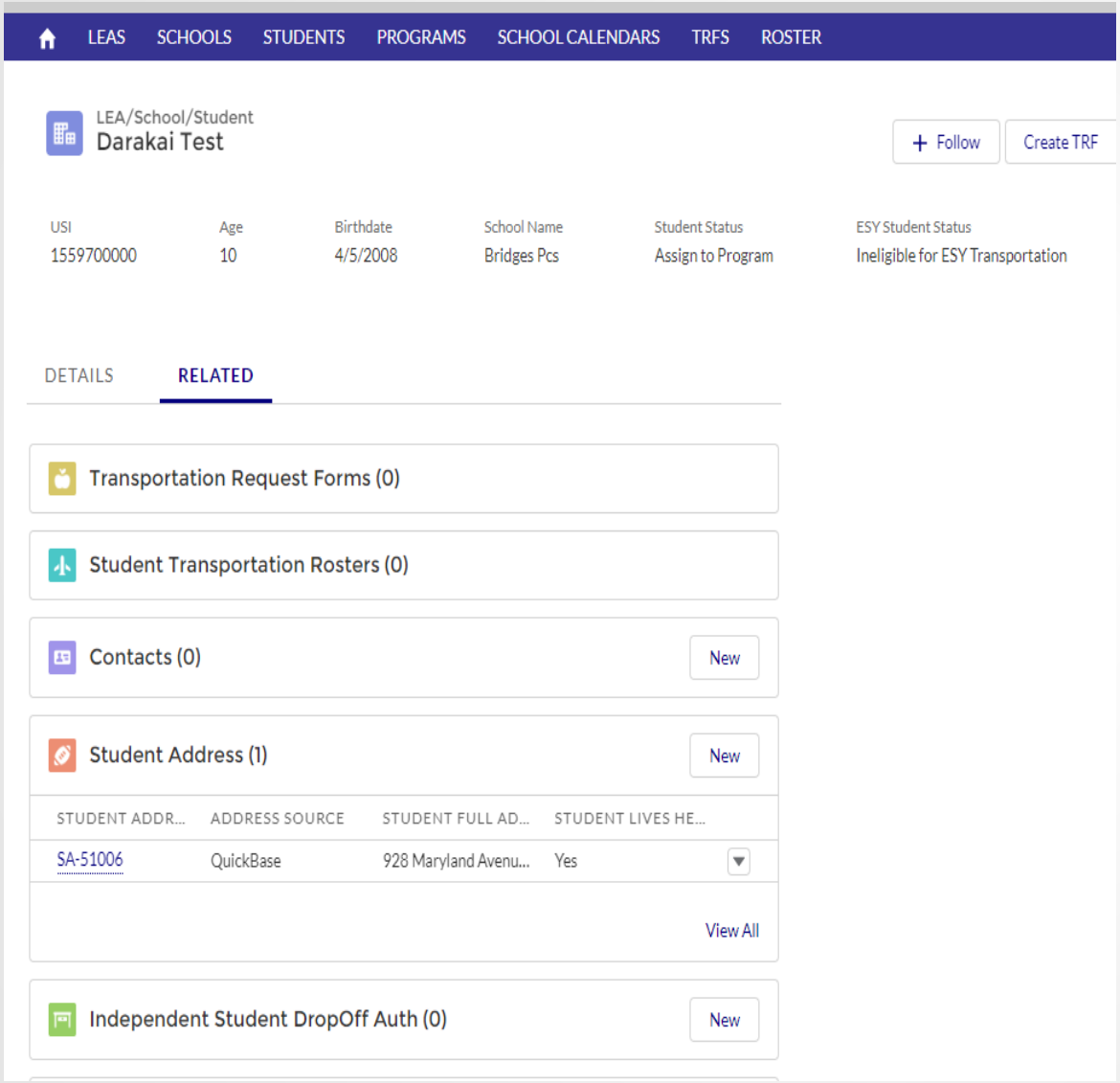
Key Documents

- *TOTE 2.O Training Manual*
- *Quick start guide - Reference page 5 - 6*

Managing Student Addresses



Student addresses can be added into the system by:

- Selecting the New button

These can also be created from the 'Related' tab when clicking on the student. See screenshot.

Managing Student Rosters

Student Transportation Rosters may only be viewed in the system.

Steps:

- Click the Roster object

- The system will default to the Roster page

Check for Understanding

1) Can TRFs be created without Programs and Calendars?
2) Is the new TOTE application the system of record for student data?

Create Transportation Request Forms (TRF)

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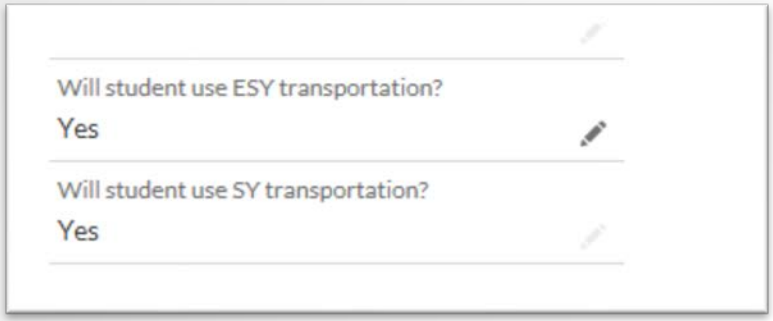
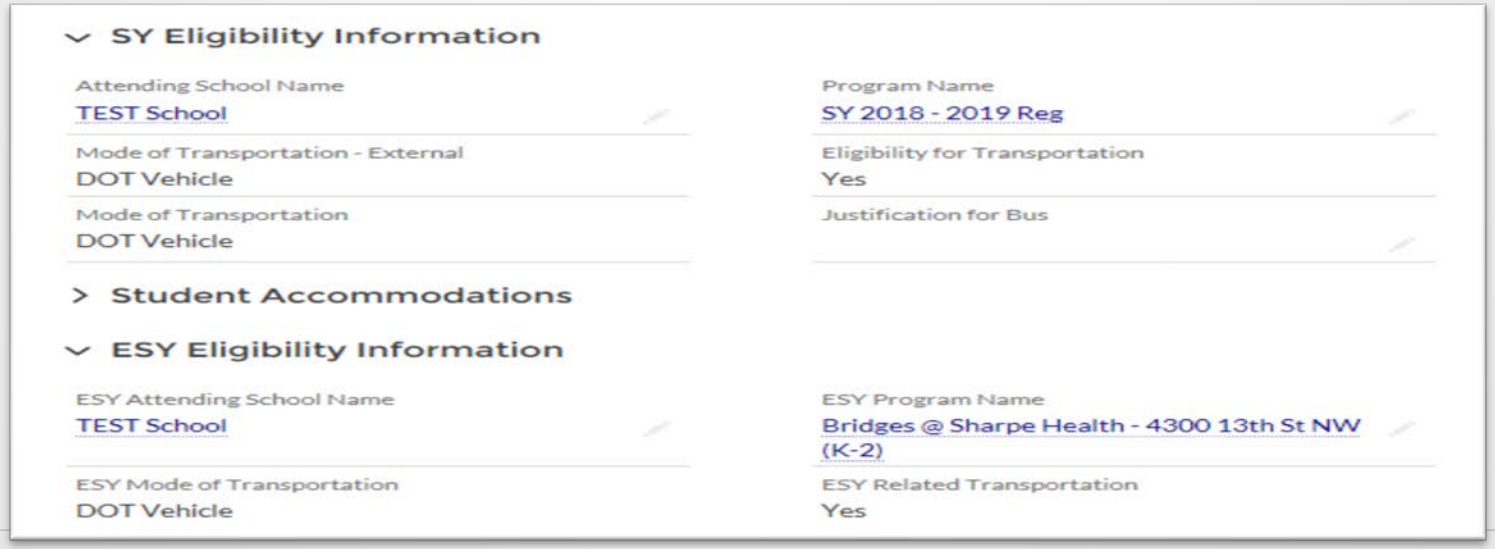
Steps in Creating a TRF

1) Review Student Detail tab.
   a. Ensure the follow questions are answered prior to creating a TRF



   b. Review the attending school name and program name in SY Eligibility Information section and ESY Eligibility section.



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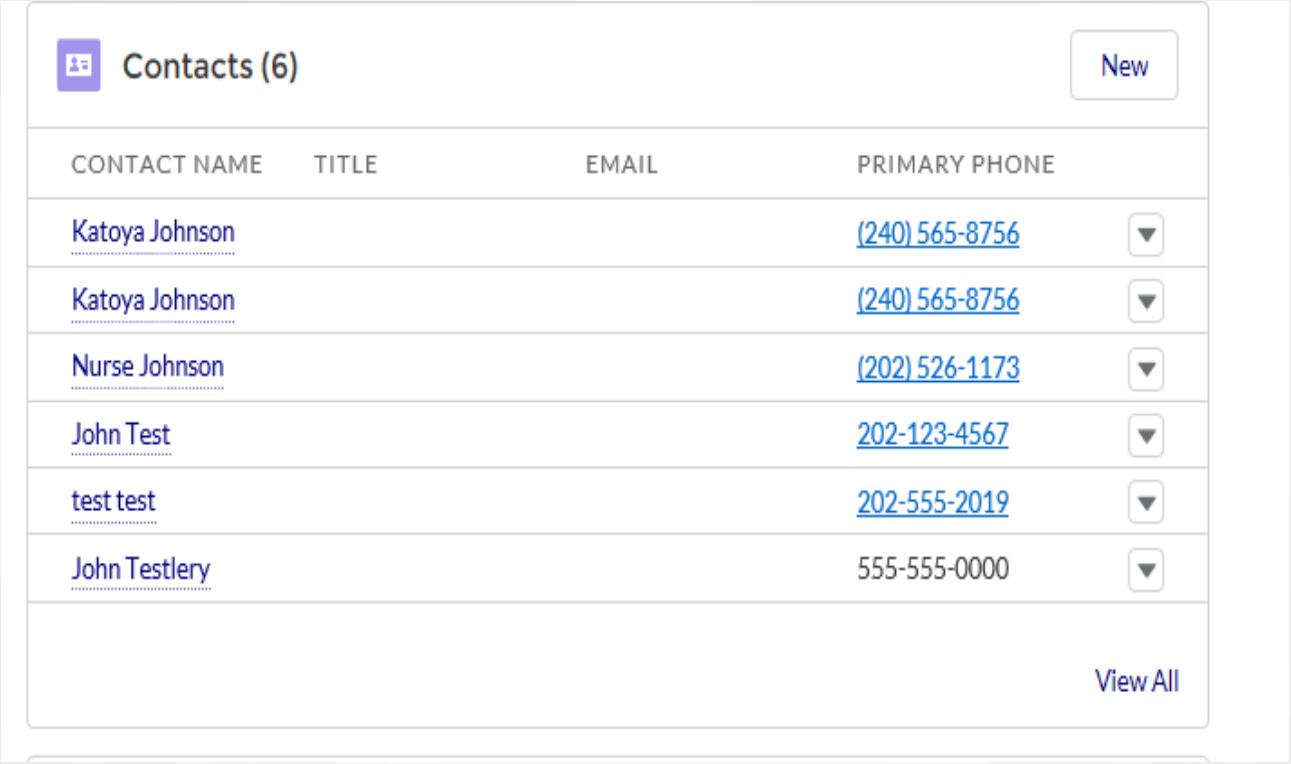
Steps in Creating a TRF

2. The user should review the student contact report located in the related tab to validate the student has a contact.



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Steps in Creating a TRF

3. The user should make sure that the student has a valid address in the system that indicts the status of “yes” for AM pick up and PM drop off. This information located on the related tab.

	STUDENT ADDRESS NA...	ADDRESS SOURCE	STUDENT FULL ADDR	STUDENT LIVES HERE	AM PICK UP	PM DRO
8	SA-51042	QuickBase	4800 BRANDYWINE STREET NW	Yes	Yes	Yes

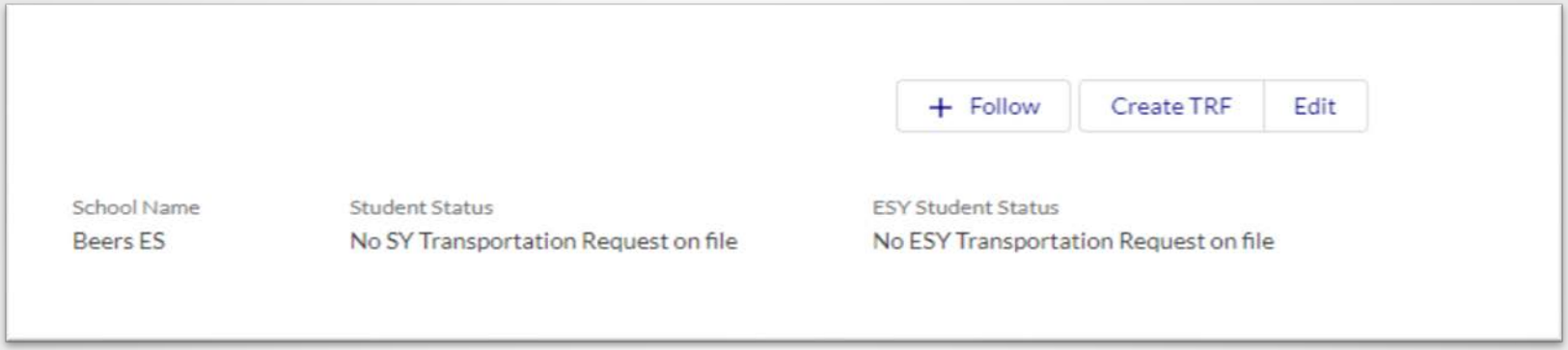
Prerequisites for Creating a TRF

Prerequisite

- Pre-requisites on Student's Attending School
  - Should have an ACTIVE Term
  - Should have a School Calendar for the selected Term
- Pre-requisites on a Student
  - Should have at least one Student Contact
  - Should have at least one Address where 'Student Lives here ='Yes', AM Route = Yes **OR** PM Route = Yes
  - Student status is not equal to one of the following statuses
    - "Test Student"
    - "Inactive"
    - " Error. Missing Eligibility Documents"
    - " Ineligible for ESY Transportation"
    - " Ineligible for SY Transportation"
    - "Assign to Program"
    - "No DOT Responsibility"

Creating a TRF

Start: Go to the record of the Student who the TRF is being created for



1. **New:** Select Create TRF
2. **Field entry:** Fill out all required fields, those with the red asterisks (*). You will also need to fill in the AM / PM / Alternate Addresses and corresponding Days of the Week for those as needed.
3. **Review info:** The system will automatically populate all Student information after saving. Review to make sure it is as you need it to be. If any Student information is not correct, view it on the Student's record (not the TRF record) and if incorrect there, make sure it is up to date in SEDs, though system may not be updated for up to 3 business.

Creating a TRF

Workflow

- The system will automatically pick up any TRFs with ‘New’ status and submit them to the Routing System. The Routing System will process them and update the Status accordingly.

- **KEY NOTE:** If you notice a mistake after you submit a Transportation Request Form, it cannot be edited. Instead, simply create a new TRF per the process above. That will automatically cancel the TRF which has errors.

Check for Understanding

1) Name two things you should check before creating a TRF?
2) Does the student need to live at the address in TOTE?
3) Why is it important to review certain data elements before creating a TRF?

Submit SY TRFs

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Closing Segment Content

1) Access to the new system will be granted based on training.
2) Data accuracy and integrity are key to the success of the new TOTE application.
   - Updating source system timely
   - Validating the data received from parents
3) Program, Calendars and TRFs submitted on time, result in timely access to Transportation.

Q&A

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Following Up

For additional assistance, please reach out to

- OSSE DOT TOTE Support
  dot.data@dc.gov
  202-576-5520

- OSSE DOT Parent Resource Center
  202-576-5000

Or visit https://osse.dc.gov/service/student-transportation

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Thank you for your participation!

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