



TOTE Quickstart Guide

The Transportation Online Tool for Education (TOTE v2.0)

TOTE is the Office of the State Superintendent of Education (OSSE), Division of Student Transportation's (DOT) database for school information and student transportation request forms.

The new TOTE v2.0 Dashboard is your homepage. Return to this screen by clicking the Home button.

The home screen looks similar to the screenshot on the right. LEAs and schools will have access to key reports at a glance and important student transportation updates.

Access the new TOTE v2.0 and a digital copy of this user guide:

www.osse.dc.gov/node/756732

DASHBOARD
LEA Dashboard
As of Mar 12, 2019 1:54 PM Viewing as Test School

Summary Report by ...
LEAs Schools Students Sum...

LEAs/Schools/Students ...	Re...
LEA	
School	
Student	11

No. of TRFs by Term
TRFs Summary Report

Term	Record Count
2018-2019	9
ESY 2018	7

SY Student Status
SY LEA List for Dashboard

Record Count

5 THINGS TO KNOW

1. OSSE DOT provides an LEA reimbursement policy for special circumstances at the start of school to ensure all eligible students have access to transportation when their school year begins.
2. Students who are new to your local education agency (LEA) in 2019-20 will not appear in the Transportation Online Tool for Education (TOTE 2.0) until the LEA where the student was previously enrolled exits the students, and you, the LEA receiving the student, have transitioned your student information systems to the new school year.
3. The deadline for submitting transportation request forms (TRFs) for returning students is June 3; this will provide OSSE with enough time to build and practice the bus routes. TRFs for students who are new to your LEA must be submitted at least 10 days prior to their first day of school, which, for students

Symbols Key Edit



View



Save & More

Remember to save after each step



Home

If you ever get lost, just go home



TOTE Checklist

1. Local Education Agency (LEA) Form
 - Addresses and Contact Info (all schools in LEA)
 - Special Education Transportation Contact(s)
 - Submission/ Transportation Certification Status
 - View/Edit Student Status Details
2. School Form
 - School Address and Contact Info
 - School Transportation Rosters
 - Special Education Transportation Contact(s)
 - Extended School Year (ESY) Site
 - Year Round School Details
 - Multiple Programs and Bell Times
 - School/Program Calendar and Bell Times
3. Student Form
 - Check Student Status
 - Eligibility Info
 - Student Enrollment Info
 - Student Placement Info
 - Student Contact(s)
 - Student Address(es)
 - Submit Student Transportation Request Form
4. Submission and Transportation Certification
 - Transportation Certification Confirmation

Access

All: View student data
DCPS SPED LEA/LEA Admin: Certify student data; submit Transportation Request Form (TRF)
School Staff/ DCPS Case Manager: Submit student data, but cannot certify data; submit TRF
Non-Public: Submit school calendar info; only view student info.

Questions or Issues?

For immediate assistance, please call the TOTE Support Line at (202) 576-5520.

Certification Deadlines

ESY - May 6, 2019

SY - June 3, 2019

1

TOTE v2.0 Views

The screenshot shows the TOTE v2.0 interface. At the top is a red header with the OSSE logo, a search bar (labeled 1), and a 'SEARCH' button. Below the header is a dark blue navigation bar with tabs for LEAS, SCHOOLS, STUDENTS, SCHOOL CALENDARS, PROGRAMS, STUDENT ADDRESSES, TRFS, and STRS (labeled 2). The main content area shows a 'Programs' section with a 'Recently Viewed' dropdown (labeled 3) and a 'View Dropdown' (labeled 4). The 'View Dropdown' is expanded, showing a list of views: 'All', 'All - ESY Programs', 'All - RSY Programs', 'Recently Viewed' (selected), and 'Bridges PCS-Main Campus'. To the right of the dropdown is a table of 'SCHOOL NAME' with entries for 'Bridges PCS' (labeled 5). The table has columns for 'SCHOOL NAME', 'RSY', and 'Bridges PCS'.

1

Search Bar – The Search Bar allows you to search through important fields across all the objects. As you type, possible matches will pop up in a list below the search bar. You can either chose that match, or hit Enter and be taken to a full list of matches, listed by Object.

In the Results screen, you can choose from the Objects listed in the left menu bar to go directly to match within that Object.

2

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).

3

Dashboard – The Dashboard displays a few charts summarizing the information available to the user, including numbers of schools and students, student status for the school year (SY) and extended school year (ESY), and status of TRFs. Each of the charts has a link at the bottom. Click to see the full list in the report and browse to the individual records for more details.

Views

4

When you click on any of the Object tabs, you will be taken to a list of records in the Object. The default view for each object is recently viewed records.

Once you expand the list view by clicking on it, you will see all the pre-configured lists of other views available. As an example, after clicking on programs, you can click on the dropdown and select “All – ESY Programs”, resulting in a view of all ESY programs associated with your LEA.

You can see all of your special education transportation contacts for all of the schools in your LEA on the LEA Form. You can also add, remove and edit contacts on the LEA Form. Just click the “Add Contacts” button or the Edit button.

View Submission and Transportation Certification Status You can view your submission and transportation certification status on the LEA Form. Certification and submission are covered in section four of this guide.

View Student Status Detail/Student Transportation Rosters You can view the status of your student data on the LEA Form. Student data entry and the Student Transportation Request Form are covered in section three of this guide.

5 Each View shows Action Buttons. When the user has permissions to create a new record for the particular Object, the “New” button will be available on the very top right-hand corner of the page and the user can select it to pull up a data entry screen for the new record.

Calendar Creation Steps:

- On the Task Bar, click the object titled; *School Calendars*.
- On the School Calendar page, Click the “New” button.
- The “*New School Calendar*” page will open (for more details, please reference the TOTE user guide).

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 are fields that are linked to other objects. These values are often already 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 are similar to dropdown list, they 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.

Student Statuses

Missing Eligibility Documentation

Student may be missing documentation in SEDS and/or TOTE to make them eligible for transportation services.

Assign to Program

The student is placed in a school with multiple bell times and/or different school calendars. This student must be assigned to one of those programs in TOTE in order to submit a transportation request form.

No Transportation Request on File

There is no school year transportation request on file. The student cannot be routed without a transportation request form.

Transportation Request Complete

All required fields have been completed and the transportation request form has been submitted for the school term.

Ineligible for ESY Transportation

The student is not eligible for ESY-related transportation.

Eligibility Undetermined (ESY)

In SEDS, the ESY determination for transportation is missing (blank). The LEA must update the ESY determination in SEDS.

Eligible, Not Using Transportation

The student is eligible for transportation but is not utilizing these services per LEA certification. This includes students eligible for transportation at non-public schools.

No DOT Responsibility

The student is not eligible for special education transportation OSSE DOT has no responsibility to transport the student.

3 Record Views

The screenshot displays the TOTE School Calendar record view, organized into three main sections:

- 1) Record Header:** Located at the top, it includes a 'School Calendar' title, a 'New Opportunity' button, and an 'Edit' button. Below these are fields for 'Principal', 'First Day' (8/21/2017), and 'Last Day' (6/15/2018).
- 2) Record Details:** Located on the left, it contains a 'DETAILS' tab and a 'School Calendar Form' section. This section includes fields for 'Record ID#' (S-4538), 'Related School' (Hermitage Hall Nashville TN), 'Program', 'Administrative Office Address' (1220 8th Ave South), 'Grade', 'School Name', 'School Address On File', 'Principal', and 'Calendar Feed Staging' (CF-0271).
- 3) Related Lists:** Located on the right, it contains three expandable lists: 'Calendar Exceptions (0)', 'Calendar Discrepancies (0)', and 'School Calendar History (1)'. The 'School Calendar History' list shows a record for 'Date: 5/16/2018 9:55 AM', 'Field: Created', 'User: Sagar Jogi', and 'Original Value:'. A 'View All' link is at the bottom.

There are generally three sections when viewing records. The first is the Record Header located either at the top or to the left (number 1 above). This contains a summary of important fields.

OSSE EMI Form Data

School Address & Contact Information and School Details can no longer be edited through TOTE. If the data in these sections are incorrect, please update your details via the EMI Form with OSSE's Division of Data Management at osse.leadata@dc.gov.

Special Education Transportation Contacts Special Education Transportation Contacts refers to all contacts who will have info about students and your school. This section serves to capture those individuals who are able to handle school calendar configuration issues and student issues.

1. If the contacts listed are the only contacts for your school, choose "Yes" in the dropdown box.
2. If there are additional contacts, choose "No" to reveal the "Add Contact" button.
3. Click the "Add Contact" button and enter the required fields, applying the correct contact role.
4. Click "Save" or the down arrow to the right of the "Save" button to save and add another contact.

Multiple Programs and Bell Times

This section supports those schools with multiple populations of students (different school start/end dates, bell times, principals) at one location.

A school may serve pre-school, kindergarten and elementary school students at one campus. Or there may be students enrolled in FAPE-related activities extending past the regular school day. For the purpose of TOTE, those students are enrolled in a specific Program.

1. Indicate "Yes/No" regarding whether your school has multiple programs.
2. If you choose "Yes" the Program Information section will appear. Click the "Add Program" button to add multiple program info. You are only required to enter details that differ from your main program details.
3. Click "Save" when you are done. You will be able to review the program details on the School Form.

The second is the Record Details (number 2 above) located just under (or to the right) of the Record Header. This section contains all of the fields to be viewed for a record.

The third section contains the Related Lists, or other Objects that can have multiple records associated with this single record (number 3 above). For example, a single School Calendar will have multiple Calendar Exceptions associated with it due to the student holidays that occur throughout the year. To add items to these lists, select the dropdown in each list and choose "New." When the list has entries, some brief details of a few of those entries will be displayed by default. The dropdown will contain an option to "View All" if that is desired.

Managing LEAs

TOTE is NOT the system of record for the LEA details displayed in the system. This data is pulled from each LEA/School Student Information System (STATESIS) into SEDS, and is transferred into TOTE nightly. Any updates or changes to this information should be made in the system of record and they will be pulled into TOTE within 24 to 48 hours.

In TOTE LEAs have the following Related Lists which can be used to verify information regarding THE LEA:

- Schools – these can be viewed from this list.
- Contacts – these can be viewed or added from this list.

Managing Schools

TOTE is NOT the system of record for the school details in the system. The data is pulled from SLIMS, so updates should be made there and they will be pulled into TOTE within 24 to 48 hours. Schools also have the following Related Lists:

- School Calendars – these can be viewed or added from this list.
- Programs – these can be viewed, edited, or added from this list.
- Contacts – these can be viewed, edited, or added from this list.
- Students – these can be viewed, edited (selected fields) from this list.

Managing Students

1. All student information for students is pulled from SEDS. Any details that need to be changed about a student should be updated here, except for 504 eligible students. Details for 504 Students should be provided to OSSE DOT staff via the secure portals, Box and an email notification of the request should be sent to dot.data@dc.gov for them to create accounts in the system.
2. Students also have the following Related Lists:
 - Transportation Request Forms – these can be viewed from this list.
 - Contacts – these can be viewed, edited, or added from this list.
 - Student Addresses – these can be viewed, edited, or added from this list.
 - Independent Student Drop-off Auth – these can be viewed from this list.

Managing School Calendars

1. School Calendars can be added into the system via the process for creating records earlier in this document. These can also be created from the "Related" tab when clicking on the school.
2. School Calendars also have the following Related Lists:
 - Calendar Exceptions to add planned student holidays or other exceptions from the school year. These can be viewed, edited, or added from this list.
 - Calendar discrepancies for unplanned student calendar changes such as snow days. These can be viewed, edited, or added from this list.

Inclement Weather Closures & Make-Ups

Indicate the jurisdiction your school follows.

Calendar Exceptions

Calendar exceptions are all non-recurring early dismissal days, days school is closed, inclement weather make-up days, and/or days students are not expected to report to school (e.g., professional development days and federal holidays).

Click the Related tab "Add Calendar Exception Day" button. You may enter multiple calendar exception days on this form. Simply choose the "Save & New" option from the dropdown next to the "Save" button.

The screenshot displays the 'School Calendar' management interface. At the top, a navigation bar contains links for LEAS, SCHOOLS, STUDENTS, PROGRAMS, SCHOOL CALENDARS, TRFS, and ROSTER. The main content area is titled 'School Calendar' and includes fields for 'Principal', 'First Day' (7/1/2019), and 'Last Day' (7/31/2019). Below these fields, there are two tabs: 'DETAILS' and 'RELATED'. The 'RELATED' tab is selected and highlighted with a red box. Under the 'RELATED' tab, there is a section for 'Calendar Exceptions (0)' with a 'New' button highlighted by a red box. Below this is a 'School Calendar History (1)' section containing a table with the following data:

DATE	FIELD	USER	ORIGINAL VALUE	NEW VALUE
4/2/2019 1:45...	Created.	Test School		

A 'View All' link is located at the bottom right of the history section.

5

Managing Program Data

Managing Programs

Programs can be added into the system via the process for creating records earlier in this document. These can also be created from the "Related" tab when clicking on the school.

Managing Student Rosters

Student Transportation Rosters may only be viewed in the system.

Managing Student Addresses

Student addresses can be added into the system via the process for creating records earlier in this document. These can also be created from the 'Related' tab when clicking on the student. See below screen shot:

[LEAS](#)
[SCHOOLS](#)
[STUDENTS](#)
[PROGRAMS](#)
[SCHOOL CALENDARS](#)
[TRFS](#)
[ROSTER](#)

LEA/School/Student
Darakai Test

[+ Follow](#)
[Create TRF](#)

USI 1559700000	Age 10	Birthdate 4/5/2008	School Name Bridges Pcs	Student Status Assign to Program	ESY Student Status Ineligible for ESY Transportation
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[DETAILS](#)
[RELATED](#)

Transportation Request Forms (0)

Student Transportation Rosters (0)

Contacts (0)
[New](#)

Student Address (1)
[New](#)

STUDENT ADDR...	ADDRESS SOURCE	STUDENT FULL AD...	STUDENT LIVES HE...
SA-51006	QuickBase	928 Maryland Avenu...	Yes

[View All](#)

Independent Student DropOff Auth (0)
[New](#)

INDIVIDUAL STUDENT EDIT IS THE ONLY WAY
TO SUBMIT STUDENT TRANSPORTATION

IF SEDS HOLDS INACCURATE DATA TOTE WILL HOLD INACCURATE DATA. YOU MUST CORRECT SEDS IN ORDER TO CORRECT TOTE.

Creating a new Transportation Request

Before creating a new Transportation Request Form (TRF) for a Student, a School Calendar for the School and the Term for which the TRF is being created needs to exist (e.g., if during the summer, you are creating a TRF for students in the fall you would need a Calendar for the Term of "SY 2018 – 2019"). See the Prerequisites for submitting a valid TRF below.

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"
 - Checks applicable to SY TRF
 - IF Will student use SY transportation? = Yes **OR**
 - IF Alternate Eligibility for transportation = Yes
 - Checks applicable to ESY TRF
 - IF Will student use ESY transportation? = Yes

Filling out the Transportation Request Form

1. Start: Go to the record of the student who the TRF is being created for.
2. New: Select either the New SY TRF or New ESY TRF, as desired.

Transportation Request Details

Indicate the term, request reason, and whether the transportation request should go live sometime after the estimated go live date (if "Yes," enter the alternate go live date).

Mode of Transportation

If AM pick up and/or PM drop off is needed, choose "Yes" from the dropdown box(es) and enter the address details, including days of the week the transportation is needed and any alternate locations. If the student will use public transportation, a home address is required for both AM pick up and PM drop off.

ONCE ALL THE DETAILS ARE ENTERED, SAVE THE FORM. YOU WILL RECEIVE EMAIL CONFIRMATION.

Indicate Mode of Transportation

7 TRF Processing and Management

3. Field entry: Fill out all required fields, marked with the red asterisks (*). You will also need to fill in the AM / PM / Alternate Addresses and corresponding days of the week as needed.
4. Review info: The system will automatically populate all student information after saving. Review to make sure it is correct. If any student information is not correct, view it on the student's record in TOTE (not the TRF record) and if incorrect there, make sure it is up to date in SEDS, though may not be updated for up to three business days.

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: Submitted TRF's cannot be edited. If you notice a mistake after you submit a Transportation Request Form, simply create a new TRF per the process above. That will automatically cancel the TRF which has errors.