Instructional Management Program and Academic Communication Tool

QUICK GUIDE: Transportation in SIM

03/31/2017
Version 6.0 FINAL
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**Note**

This module was updated in IMPACT Student Information Management (SIM) version 8.4.3. There may be slight differences between screens in this lesson compared to the screens in the actual CPS IMPACT environment. All screens were captured in Windows using Internet Explorer; Macintosh views may differ.

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Overview

SIM transportation functionality provides school-based users with the capability to submit, view, edit, and delete student transportation requests.

School staff with the following roles has access permissions in SIM to submit transportation requests:

- Case Manager
- Principal
- Status Coordinator
- Student Services Liaison

Note: For questions and/or clarifications related to POLICY, contact Student Transportation Services (STS) at 773-553-2860, stutran@cps.edu

For technical issues, contact the ITS Service Desk at 773-553-3925, option 2.

Transportation Enhancements

Eligibility determination and additional approvals for student transportation have been added to SIM. Adding eligibility determination to SIM has resulted in several enhancements to school users, as detailed below.

Immediate Eligibility Determination

When a school user submits a transportation request, eligibility will be determined immediately and the results displayed, as illustrated in the following screen captures.

The following screen capture illustrates a request that has been determined as “Eligible.”
The following screen capture illustrates a request that has been determined as “Rejected”:

Re-calculation of “Rejected” Requests

As illustrated in the screen capture above, if a request is rejected, click on the Rejected Request Status to view the reason for the rejection.

If the user is able to correct the reason for the rejection, SIM will re-calculate eligibility and display the results. A new report, entitled “Transportation Rejected and Ineligible Requests,” is now available on the CPS Dashboard to assist schools with monitoring rejected requests. See pages 5 and 6 for more information.

Note: Transportation requests that are ineligible will be re-evaluated for eligibility each day for seven (7) calendar days. This function prevents users from having to re-enter requests once data has been corrected.

After seven (7) calendar days, the request will become inactive and the school will need to enter a new request.
Monitoring Transportation Requests (on CPS Dashboard)

Several reports are now available on the CPS Dashboard to assist schools with monitoring transportation requests:

- **Transportation Active Requests**: The report lists the students at your school who have active transportation requests in SIM, their contact information, and transportation information including route number and the name of the school bus company assigned to each student’s route. Note: there is also a column “Ineligible” which indicates whether or not the student is eligible for bus service. You should investigate by opening the current request to view the error message and, if applicable, make corrections to the request and resubmit it.

- **Transportation Rejected/Ineligible Requests**: The report lists students at your school whose transportation request has either rejected on entry or whose active request has become ineligible for the reason shown on the report. For rejected requests, investigate to see if a correction can be made. If so, put an end date into the rejected request, and then submit a new transportation request. For ineligible requests, if a correction can be made, fix the request and click “OK” to resubmit.

- **Transportation Pick-Up Site Report**: The report lists the students coming to your school to be transported to another school. It lists the school the students attend, the bus company, route number, and parent/guardian information. This list is for Site Monitors or other assigned school staff responsible for monitoring these students.

- **Special Education Students Missing Active Transportation Request**: This report lists students that have transportation as a required service checked off in Section 15 of their IEP in SSM; HOWEVER, there is no active transportation request in SIM. Please note that SSM does NOT automatically create a request in SIM.

The school has three options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>You review the IEP and determine that transportation should be provided. Enter a new request in SIM on the student’s Transportation page.</td>
</tr>
<tr>
<td>2</td>
<td>You review the IEP and determine that transportation is not needed. Revise the IEP to indicate that the student is not eligible for transportation.</td>
</tr>
<tr>
<td>3</td>
<td>You follow-up with the parent/guardian who tells you that they do not want CPS-provided transportation (i.e., perhaps they plan to drive the child to school). Revise the IEP in Section 15 to reflect that the child needs transportation; however, the parent/guardian has declined transportation services.</td>
</tr>
</tbody>
</table>
Note:

- School staff who is assigned the “Bus Coordinator” responsibilities should ask the Principal to give them permission via ODA to access the CPS Dashboard in order to use these reports.
- The reports are located on the CPS Dashboard, under Reports.
### Submitting a Transportation Request

#### Required “Pre-Conditions”

The table below details required “pre-conditions” that must be in the student’s record before submitting a transportation request in SIM.

<table>
<thead>
<tr>
<th>Transportation Type</th>
<th>Pre-Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Note:</strong></td>
<td>For all transportation types, the following data must be completed/indicated in SIM:</td>
</tr>
<tr>
<td></td>
<td>- Student must be enrolled in the school that is requesting transportation.</td>
</tr>
<tr>
<td></td>
<td>- Student must have a valid address in SIM (a physical address is preferred; however, if there is no physical address, a mailing address may be used.)</td>
</tr>
<tr>
<td></td>
<td>- Student’s Federal Ethnic and Federal Race are indicated.</td>
</tr>
<tr>
<td></td>
<td>- Student’s gender and grade level are indicated.</td>
</tr>
<tr>
<td>AL – Options/SAFE</td>
<td>Transportation for ALOP and SAFE School students</td>
</tr>
<tr>
<td>IT – Involuntary Transfer</td>
<td>ONLY CPS-approved controlled enrollment Receiving Schools may submit this type of request.</td>
</tr>
<tr>
<td>OK – Options for Knowledge</td>
<td>Student must be assigned to one of the following programs in SIM:</td>
</tr>
<tr>
<td></td>
<td>- Academic Centers</td>
</tr>
<tr>
<td></td>
<td>- Classical Schools</td>
</tr>
<tr>
<td></td>
<td>- Elementary Magnet Schools</td>
</tr>
<tr>
<td></td>
<td>- International Gifted Programs (formerly known as IBP)</td>
</tr>
<tr>
<td></td>
<td>- Regional Gifted Centers</td>
</tr>
<tr>
<td>SA – Safety</td>
<td>Safe passage shuttle as determined by Student Transportation Services</td>
</tr>
<tr>
<td>SH – Shuttle</td>
<td>Shuttle between school buildings as determined by Student Transportation Services</td>
</tr>
<tr>
<td>SE – Special Education</td>
<td>Student must have a record in SSM. Transportation must be indicated in either an IEP or 504. A Bus Aide, Nurse, wheelchair, car seat or harness must be indicated, if it is required.</td>
</tr>
<tr>
<td>SW – Special Education</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Wheelchair</td>
</tr>
<tr>
<td></td>
<td>SSM data will appear in SIM the day after it is entered. If a transportation request is entered in SIM before the SSM data appears, the request will be rejected.</td>
</tr>
<tr>
<td></td>
<td>However, SIM will re-calculate eligibility once the SSM data appears.</td>
</tr>
<tr>
<td>XH – Students in</td>
<td>Student MUST be assigned to the STLS Program in SIM.</td>
</tr>
<tr>
<td>Temporary Living</td>
<td>The school no longer enters a transportation request into SIM for an STLS student. This is now done by the STLS Dept. when the student is approved into the program.</td>
</tr>
<tr>
<td>Situations (Homeless)</td>
<td>If the student’s residence is located outside of the Chicago city limits, the address must be entered in the Mailing Address fields.</td>
</tr>
<tr>
<td></td>
<td>STLS students who have transportation per an IEP/504 will continue to receive transportation using the “SE” or “SW” Trans type.</td>
</tr>
</tbody>
</table>
**Work Steps**

The following steps detail how to submit a transportation request in SIM. See *Appendix A: Transportation Request Checklist* (page 15) for specifics related to the type of program (i.e., Options for Knowledge, Involuntary Transfer, etc.)

1. Perform a student search to locate and open the student's record.
2. In the *Control Bar*, click the *Transportation* link. Note the following:

   ![Student Basic Information](image)
   
   **Note:** Student Basic Information section now includes the student's current zone school.

3. Scroll down to the *Student Transportation* section.

   ![Transportation Records](image)
   
   **Note:** Trans Accommodations are now read only, and come from the student's IEP/504 in IMPACT SSM or are entered by STS.

   To add a transportation record:
   Under the *Transportation Records* section, click *Add.*
4. On the Add/Edit Transportation Record page:
   a. Under the Eligibility Section, complete the following:

   - **For Entry Date:** enter “today’s” date.
   - **Only enter Exit Date and Exit Reason if ending a request.**

   - **For Change Trans Type,** select the applicable type.

   - **For Wheelchair Lift,** select Yes or No, if applicable.

   - **For Half Day,** select whether student attends AM, PM, or Full Day.

   - **If a request is Rejected,** the reason displays here.

   b. Scroll down to the Transportation section; complete the following; and click OK to save.

   - **For Change Pickup Type:** select Home or Site.

   - **Home** uses the student’s address. See page 10 for more information.

   - **If Site is selected, specify a Pick-up Unit. Note:** SIM will only allow schools to select the two nearest pick-up sites based on student’s address.

   - To pre-determine the two nearest pick-up sites, go to www.cps.edu/busmap.

   - **Check CTA** if student will be receiving CTA passes or parent reimbursement from the school.

   - The remainder of the fields in this section are Read only and are populated by SIM when processing requests.
Student’s Physical and Mailing Addresses

When Home is selected in the Change Pick-up Type field, SIM uses the student’s Physical Address, located on the student’s Demographics page, Phone/Address tab.

Note the following:

- If the student’s Physical Address fields are empty, the student’s Mailing Address is then used.
- If both the Physical Address and Mailing Address fields are empty, the transportation request will be Rejected.

**IMPORTANT:** If a student’s Physical Address is valid; however, the address is not yet available in SIM, contact the ITS Service Desk at 773-553-3925, option 2 to have the address range added to the system.

Until the address range is available in SIM, enter the student’s address in the Mailing Address fields so that the student can receive transportation. Do not wait for the Physical Address to be available.

When a Student’s Address Changes

When a student's address is changed in SIM, the school does NOT have to end one request and begin another.

1. If the student gets picked up at home, the nightly processing in SIM will detect the new home address and send it to be routed. The school does NOT have to end one request and begin another.

2. If the student gets picked up at a school site, the school should check the transportation request. If SIM has put an error message in the request “Allowable Pick-Up Site Not Selected,” the school should contact the parent to select one of two appropriate school pick-up sites nearest the new home address, which will be listed in the error message. When the choice is made, the school should go back into the request, enter an end date, then click OK. The school should enter a new request with the new pick-up site.

If SIM determines that the request no longer meets the eligibility criteria, an error message will display within the request, and also on the Transportation Reject Requests report on the CPS Dashboard. Rejected/ineligible requests will remain active for seven (7) calendar days in order for the school to correct the problem. After that grace period, SIM will auto-end the request.
**Ending a Transportation Record**

1. Perform a student search to locate and open the student's record.
2. In the Control Bar, click the Transportation link.
3. Under the Transportation Records section, click the Request Status of the record to be ended.

   ![Transportation Records Table]

   **Reminder:** An active transportation record has a status of Eligible, Submitted, or Routed, with no Exit Date or Exit Reason listed.

4. On the Add/Edit Transportation Record page:

   ![Add/Edit Transportation Record]

   Enter an Exit Date and Exit Reason. Click OK to save your information.

   Note that the student's record will now list an Exit Date and Exit Reason.

   ![Transportation Records Updated]

   The status of the request remains Routed until overnight processing changes the status to Ended.
Automated Termination of a Transportation Record

Any situation that causes a student’s enrollment in that school to be ended will result in automatic termination of the student’s transportation record. For instance, the student is withdrawn from the school.

If a student’s IEP/504 has been amended to either remove or decline transportation, this will trigger the system to automatically end the current transportation request after the grace period.

Did Not Arrive (DNA) Status

If a student is withdrawn at the end of the first day of school with code 99 – Did Not Arrive AND the student has an existing transportation record, the record will remain active for one week, pending the student’s re-enrollment. After one week, SIM will end the transportation record. If the student then re-enrolls, after the record has been ended, the school will need to enter a new transportation request.
Submitting Next Year Transportation Requests in the Planning Calendar

SIM transportation functionality includes the ability to enter requests for the next school year, based on the following two scenarios:

1. Placing a future request for a student who currently does not receive transportation and is eligible for next school year.
2. Placing a future request for a student who is currently receiving transportation and will be attending a different school next year. **Note:** The school the student will attend for the next school year should enter a new request in the Planning Calendar after the student has been projected to that particular school.

**Note:** For students who will continue at your school next year and have an active transportation request which will remain eligible for next year, the current transportation request will automatically roll over. **No action is required.**

**Note:** The date to start entering next year requests is determined each year by Student Transportation Services. Any requests submitted before the determined date will be automatically rejected. Requests are entered into the school’s Planning Calendar and can only be entered until the end of June of the current school year.

**Do NOT** make address changes to the student’s address in the Planning Calendar, as this change will update the student’s address in the current school year. If a student is currently receiving transportation **AND** will have an address change for next school year, the address change must be made after July 1. At that time, the Planning Calendar becomes the Active (Current) Calendar for the new school year.

1. Log into SIM with either the Principal role, Status Coordinator role, or Student Services Liaison role.
2. From the Breadcrumbs, click the Planning button to switch to the Planning Calendar.

![Planning Calendar](image)

Note that the Planning Calendar is green, and lists the next school year.
3. Perform a student search to locate and open the student's record.
4. In the Control Bar, click the Transportation link.
5. Follow the work steps detailed on pages 8 and 9 to submit a transportation request.

**IMPORTANT:** Enter an Entry Date of 07/01/2017 for next year transportation requests.
## Appendix A: Checklist for Entering Transportation Requests

### Options for Knowledge Program

<table>
<thead>
<tr>
<th>“Pre-Conditions”</th>
<th>Student must be assigned to one of the “Options for Knowledge” programs in SIM. Reference the Student Transportation Quick Guide, page 7, for additional details.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>To add request:</strong></td>
<td>Inside the student’s record, in the Control bar, click the Transportation link.</td>
</tr>
<tr>
<td><strong>Entry Date</strong></td>
<td>Use today’s date in the Active Calendar, or the future date of 7/1/2017 in the Planning Calendar</td>
</tr>
<tr>
<td><strong>Trans Type</strong></td>
<td>OK – Options for Knowledge</td>
</tr>
<tr>
<td><strong>CTA</strong></td>
<td>Select this checkbox if the student will be receiving CTA passes or parent reimbursement from the school.</td>
</tr>
<tr>
<td><strong>Pick-up Type</strong></td>
<td>SITE</td>
</tr>
<tr>
<td><strong>Pick-up Unit</strong></td>
<td>Select the name of the school where the student will get on the bus. Note: SIM will only allow schools to select the two nearest pick-up sites based on student’s address.</td>
</tr>
<tr>
<td><strong>To save request:</strong></td>
<td>Click the OK button at the bottom right of the screen</td>
</tr>
<tr>
<td><strong>Results</strong></td>
<td>SIM will immediately calculate eligibility, and Request Status will change to Eligible or to Rejected. After processing, the Eligible status will change to Submitted. Once route has been assigned, the status will change to Routed. If the request is Rejected, look inside the request at the Request Error reason.</td>
</tr>
</tbody>
</table>

### Special Education Program

<table>
<thead>
<tr>
<th>“Pre-Conditions”</th>
<th>Transportation must be indicated in SSM in IEP or 504. Any special accommodations must be indicated, if it is required. Reference the Student Transportation Quick Guide, page 7.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trans Accommodations</strong></td>
<td>Section is now read only in SIM and populates from information entered into the student’s IEP in IMPACT SSM or is entered by STS.</td>
</tr>
<tr>
<td><strong>To add request:</strong></td>
<td>Inside the student’s record, in the Control bar, click the Transportation link.</td>
</tr>
<tr>
<td><strong>Entry Date</strong></td>
<td>Use today’s date in the Active Calendar, or the future date of 7/1/2017 in the Planning Calendar</td>
</tr>
<tr>
<td><strong>Trans Type</strong></td>
<td>SE – Special Education or SW – Special Education Wheelchair</td>
</tr>
<tr>
<td><strong>Wheelchair Lift</strong></td>
<td>Select Yes/No for wheelchair lift. Note: Wheelchair must be selected in the IEP/504 under Special Vehicle Equipment in SSM.</td>
</tr>
<tr>
<td><strong>Half-Day</strong></td>
<td>Indicate whether the student attends in the AM (morning), PM (afternoon), or Full Day.</td>
</tr>
<tr>
<td><strong>CTA</strong></td>
<td>Check if the student will be receiving CTA passes or parent reimbursement from the school.</td>
</tr>
<tr>
<td><strong>Special Ed Request Reason</strong></td>
<td>Enter any comments pertinent to the service for this student.</td>
</tr>
<tr>
<td><strong>Pick-up Type</strong></td>
<td>HOME</td>
</tr>
<tr>
<td><strong>Pick-up Unit</strong></td>
<td>Do NOT enter anything in this field</td>
</tr>
</tbody>
</table>
QUICK GUIDE to Transportation in SIM

APPENDIX A - CHECKLIST

<table>
<thead>
<tr>
<th>To save request:</th>
<th>Click the OK button at the bottom right of the screen</th>
</tr>
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<tbody>
<tr>
<td>Results</td>
<td>SIM will immediately calculate eligibility, and Request Status will change to Eligible or to Rejected. After processing, the Eligible status will change to Submitted. Once route has been assigned, the status will change to Routed. If the request is Rejected, look inside the request at the Request Error reason.</td>
</tr>
<tr>
<td>Day Care Requests</td>
<td>A form to request an alternate stop at a Day Care facility can be found on the Transportation website. If approved, STS will enter the request in SIM with the approved day care address.</td>
</tr>
</tbody>
</table>

**Students in Temporary Living Situations (Homeless) Program:**

**“Pre-Conditions”**

The student must be assigned to the STLS (Homeless) program in SIM.

The school no longer enters a transportation request into SIM for an STLS student. This is now done by the STLS Dept. when the student is approved into the program, and STLS approves bus service or CTA.

**Other Programs and Requests**

**NCLB Program:**

**Approval Letter**

Parent must have a letter from the NCLB Program prior to June 13, 2014 indicating approval into the NCLB program and to a specific school. Students who remain at the approved school will continue to receive transportation at that school until they graduate. No new students will be approved under this program as it ended with the close of the 2013-14 School Year.

**Transportation Request**

The school must have the Parent/Guardian fill out an NCLB Transportation Form and mail it to STS. Note: There are now only three (3) Trans Types: NR, NS, and NW. STS will enter the transportation request into SIM when the request is approved.

**Other Requests:**

Use the appropriate form for any of the following requests: Sibling Transportation, Park Kids Program, Stop Change, and Safety Hazard Exception.

**Where to Find the Forms:**

**Note:** All forms should be scanned and emailed to stutran@cps.edu. Schools will be notified when the form has been processed and a decision made.

- Parents can access the transportation forms on the cps.edu website, under the Student menu on the Transportation page: [http://cps.edu/programs/pages/transportation.aspx](http://cps.edu/programs/pages/transportation.aspx)
- CPS staff can access forms and instructions on the Student Transportation page of the Knowledge Center: [https://sites.google.com/a/cps.edu/kc/home/student-transportation](https://sites.google.com/a/cps.edu/kc/home/student-transportation)