



# **TRANSPORTATION FIELD TRIP REQUEST REFERENCE MANUAL**



## **THE PROCESS OF REQUISITIONING FIELD TRIPS**

### **REQUESTER SUBMITS TRIP REQUEST**

Requester enters trip details into Trip Tracker and submits the Trip Request.

### **PRINCIPAL APPROVES TRIP REQUEST**

The Principal looks over the trip details and, based on financial considerations, approves, rejects or cancels the Trip Request in Trip Tracker.

### **INSTRUCTIONAL IMPROVEMENT OFFICER APPROVES TRIP REQUEST**

The Instructional Improvement Officer looks over the trip details and approves, rejects or cancels the Trip Request in Trip Tracker.

### **TRANSPORTATION DEPARTMENT APPROVES THE DATA**

Field Trip Specialist looks over the financial arrangements, trip details and components to make sure they are all correct. If not, the Trip Request is rejected thus sending it back to the requester for modification, reactivation, and submission.

### **TRANSPORTATION SCHEDULES THE TRIP**

Field Trip Specialist schedules the Trip Request in Trip Tracker once the Instructional Improvement Officer has approved the Trip Request.

## **COMPLETING FIELD TRIPS**

### **1. ENTER TRIP NAME**

- a. The Trip Name should be a 1-3 word trip description. (Examples: 3<sup>rd</sup> grade Zoo, Peoria High football)

### **2. ENTER TRIP TYPE**

- a. Trip Type is the category of the field trip.
  - i. Yellow buses may only be requisitioned during the following timeframes:
    1. From 9:00 a.m. to 1:30 p.m. on school days
    2. After 5:00 p.m. on school days
    3. Anytime on non-school days

### **3. ACTIVITY TYPE**

- a. Select the type of activity from the drop down list. This field describes the purpose of the trip.

### **4. REASON FOR TRIP**

- a. Brief description of the reason for the trip (Example: City Tournament, Zoo Trip, etc.)

### **5. ACCOUNT**

- a. There are five types of accounts set up for each school. Locate your school name and select the appropriate account to be billed. (Examples: Title 1, Athletic, Out of Town)
  - i. If the money for the trip is coming out of another fund (Examples: PTO, Activity, Alumni), specify name of fund, address and contact person in the Notes section at the bottom.

### **6. REQUESTER'S NAME**

- a. Utilize the dropdown menu to select your name. If you are not located on the dropdown box, please contact Transportation at 693-4418 or email [Chris.Lingenfelter@psd150.org](mailto:Chris.Lingenfelter@psd150.org).

### **7. ORIGIN**

- a. This is where you would like to be picked up for your field trip.
- b. The Origin location should never be included as the first or last destination. It is assumed already that it is the starting point and the ending point of the trip.

c. Departure and Return Date and Times should be added next.

**8. DESTINATION(S)**

- a. This is the place or places you would like to be transported to. You can have multiple destinations. See example below:
  - i. Destination 1. Glen Oak Park
  - ii. Destination 2. Riverfront Museum
- b. Fill in the provided boxes with the first destination and arrival and departure time from that destination. Then click on the Add button. The Destination will be transferred to a box below.
- c. If you have a second Destination, enter the appropriate information for your second destination into the empty boxes just as you did for the first. Then click on the Add button and this Destination will also be added into the box below with the first Destination.

**9. PASSENGER COUNT**

- a. Regular Yellow Buses
  - i. Pre-K – Grade 8 =55-60 passengers
  - ii. High School =50 passengers
  - iii. Wheel Chair =4 wheel chairs(typically)

**10. NUMBER OF VEHICLES**

- a. Utilize the information obtained above regarding passenger count to ensure that the number of students riding can be accommodated by the number of buses requested.

**11. SPECIAL ACCOMMODATIONS**

- a. Check this box if special accommodations will be needed for this trip. (ex. Medical or safety needs)

**12. CONTACT NAME & PHONE NUMBER**

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

**13. NOTES:**

- a. **This section is very important.** The following information should be provided in the notes.
  - i. Precise pick-up locations (East side of building, in the circle drive, etc.)
  - ii. If the driver is not needed for the entire day, it is necessary to advise that the trip will be a “pick-up and drop- off only”.
  - iii. Additional contact information may be noted here as well.
  - iv. Account Numbers for funding the trip must be included in the notes. Trip will be rejected without account number (principals).
  - v. If charter bus is being requested make note of that in this field.
  - vi. After approval transportation will contact Peoria Charter with estimated cost of trip and email requester with that cost. A purchase order will need to be issued and attached with the request before any charter bus will be scheduled.

**14. ATTACHMENTS**

To attach file fill out the field trip request as normal and click submit. After the screen shows trip successfully submitted with a green check box you can proceed to the attachments tab.

- i. Click on attachments
- ii. Click on choose file
- iii. Locate the file from your location of choice
- iv. Click on attach
- v. One attached the screen will say the file has been successfully attached with a green check box
- vi. Attach additional files as needed

**Class Roster required for trip approval – Class list in a PDF format is available from Skyward**

Request a Trip | View Calendar | Today

Support | Logout

Trips | Reports | Legacy Reports | Admin | Help

### Trip Request

Status: **Unsubmitted**

- Cancel
- Reactivate
- Clone
- Close
- Delete

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- Approve
- Reject

Trip Details | Trip Estimate | Directions | Scheduling | Completion | Invoicing | Payment | Trip History

#### Trip Details

Trip Name:  Trip Date:

Trip Type:  Activity Type:

Reason for Trip:

Account:  Requester:

Expand Requester List

Account Notes:

Origin:

Departure Date:  Departure Time:

Return Date:  Return Time:

Destinations:

Destination:  Can't find your destination in the list? [Click here to add a new location...](#)

	Date	Time
Arrival:	<input type="text"/>	<input type="text"/>
Departure:	<input type="text"/>	<input type="text"/>

Click "Add" to add the select location to the list of destinations for this trip.

No destinations have been added for this trip.

**1. Enter Trip Name**

**2. Enter Trip Type**

**4. Enter Reason**

**5. Enter Requester**  
**6. Enter Account #**

**7. PICKUP POINT**

**8. Multiple Destinations can be entered**

Adults | Students | Wheelchairs | Vehicles

Number Of:     1  Special Accommodations

Contact Name:  Contact Phone:

Notes:

**Please make sure to accurately assess your counts**

## 1. Entering Trip Estimate

- a. Click on the Trip Estimate tab located at the top of the request. (It is in blue lettering.)
- b. For directions, click on Open Trip Directions/Mapping Tool.
- c. In the Destination Calculation section, enter the mileage in the Distance box. (It is outlined in blue.)
- d. Click on the Save Estimate button.
- e. **RETURN TO THE TRIP DETAILS SCREEN TO SUBMIT THE REQUEST**
  - i. Click on the "Trip Details" button at the top of the request.
  - ii. If you do not return and submit the request, it will not be saved.

VersaTrans TripTracker Trip Request - Windows Internet Explorer

http://versatrans.tulsaschools.org/TripTracker/TripRequest.aspx?RecordID=20118#

Request a Trip | View Calendar | Today

Trip Request

Status: Requested

Cancel | Reactivate | Clone | Close | Delete

Approve | Reject

Trip Details | Trip Estimate | Directions | Scheduling | Completion | Invoicing | Payment | Trip History

Trip Estimate

Trip ID: 20118  
Departure Date: 7/14/2011  
Trip Origin: Anderson Elementary, 1921 E 29th St N  
Number of Vehicles: 1

Destination	Arrival Date/Time	Departure Date/Time
Tulsa Zoo	7/14/2011 9:50:00 AM	7/14/2011 1:10:00 PM

Destination Calculations:

Distance	Rate	Distance	Total
30	\$1.65		\$49.50

Open Trip Directions/Mapping Tool

Time Calculations:

Start Date	Return Date	Total Trip Hours
7/14/2011	7/14/2011	4.00
Start Time	Return Time	Total
9:30 AM	1:30 PM	\$12.40
Driving Rate	Driving Hours	Total Sit
\$18.50	0.67	\$61.61
Sit Rate	Sit Time Hours	Total Overnight
\$18.50	3.33	\$0.00
Overnight Rate	Overnight Hours	Total Time
\$0.00	0	\$74.00

Total Estimated Expenses for Trip:

Tolls	Parking	Hotel
\$0.00	\$0.00	\$0.00
Meals	Misc Charges	Estimate Total
\$0.00	\$0.00	\$0.00

Calculate

Trip Total: \$123.50

Save Estimate

## SUBMITTING A TRIP REQUEST AFTER ENTRY

### 2. Click the Submit button!

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