SAMS Bus Purchase System Manual for District Users

Version 1 Document

SAMS Bus Purchase System Help

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SAMS BUS PURCHASE SYSTEM DISTRICT USER MANUAL

System Overview

New York State Education Law requires that the State Education Department (SED) approve all vehicles purchased by districts for the transportation of students in order for the purchase to generate Transportation Aid. The SAMS Bus Purchase System is a SAMS subsystem that:

- o Facilitates the collection, validation and processing of bus purchase data required by SED to approve districts' bus purchases,
- o Automatically approves buses for Transportation Aid
- o Establishes for every approved bus a 10-payment assumed amortization for Transportation Aid and
- o Calculates/aggregates the total aidable assumed debt service attributable to each district in each aid year that appears on districts' TRA and TRA EST output reports.

For optimal functionality of this SAMS subsystem and all SAMS components, please use the Mozilla Firefox browser.

The SAMS Bus Purchase System, accessible *only* from the 'Official' data area forms tree, consists of:

1. A Bus Approval Application Form (bus form) on which users enter the details of every vehicle purchase;

2. For buses generating aid in 2017-18 or later, a Bus Approval Form which:

    - o Displays selected information about individual buses entered into the system,
    - o Displays the current status of every bus after it has been saved,
    - o Provides access to blank and completed bus forms for adding new buses or reviewing/changing information on already-entered buses, and
    - o Allows the user to 'ready' saved buses for superintendent certification.

3. Three reports, accessible from the 'Reports' tab of the SAMS main menu bar:

    - o Buses Generating Aid on the TRA output report (aid year-specific)
    - o Buses Generating Aid on the TRA EST output report (aid year-specific)
    - o Bus Detail Report (all data for all approved buses ever entered into SAMS, cumulative over time)

The SAMS Bus Purchase System includes its own data form, help text, ready/certification process etc. While every bus that is entered into SAMS must be certified by the superintendent, there is no edit report specific to this subsystem like there is for other SAMS form sets. Rather, users will encounter a series of error messages upon entering invalid data on a 'bus form,' or upon attempting to save a form with invalid data, and will need to correct the error in order to save the form.

All activities in the SAMS Bus Purchase System occur in the 'Official' data area. The system can only be accessed from this data area, all bus form revision takes place in the official data area and the 'Sandbox' data area is not available while working in the bus purchase subsystem.

SAMS bus forms do not exist for buses that started generating Transportation Aid prior to the 2017-18 aid year. However, districts can view assumed amortization data for any bus still generating aid in 2017-18 or later aid years, on the reports called: Buses Generating Aid on the TRA Output Report and Buses Projecting Aid on the TRA EST Output Report.

Understanding the Status of Buses

Buses achieve up to four different statuses as they are processed through SAMS. Bus Purchase System statuses are similar to but not the same as Core SAMS Form Set statuses. It is best to think of the Bus Purchase System as functioning independently from the rest of SAMS; there is no connection between the status of a bus form and the status of the Form FT or any other SAMS form set.

Status	Description
SAVED	Represents the status of a bus form when a user saves the form. Bus forms cannot be saved unless all programmed validation errors are addressed. Error messages will instruct the user how to correct each error that is encountered. **A SAVED bus is not yet approved for aid.**
READY	Represents the status of a bus form when a user has successfully saved the form, reviewed its contents, and readied it for superintendent certification. A bus cannot be readied for certification until it has been saved. It is possible to edit a bus after it has been readied for certification. After editing a readied bus, it must be saved again *and* readied for certification again. **A bus in READY status is not yet approved for aid**.
CERTIFIED	Represents the status when a bus form has been certified by the superintendent. Only the superintendent can certify bus forms. A bus cannot be certified unless it is in the READY status. **A bus in CERTIFIED status has been approved for aid. No further action is required from the district or SED. Only the superintendent can edit/revise a certified bus.**
REV_AFTER_CERT	It is possible to edit a bus one or more times after it has been certified. When revisions to a certified bus are successfully saved and submitted, the bus status becomes REV_AFTER_CERT (Revised after Certification). **A bus in REV_AFTER_CERT status is still approved for aid. Only the superintendent can edit/revise a bus in REV_AFTER_CERT status.**

Bus Purchase System Workflow: How to Get a Bus Approved for Transportation Aid

Step 1:   Go to the Bus Purchase Approval Form

From the SAMS Main Menu choose:
- Forms
- Official
- Form BP: Bus Purchase
- Bus Purchase Approval Form

Step 2a: Enter and save one or more buses

- ➢ Click on "Add New Bus Information" at the bottom of the Bus Purchase Approval Form.
- ➢ Using the item-by-item help text, complete the bus form and select the 'Save' button at the bottom of the form. If there are no errors, a message at the top of the form will say the bus has been successfully saved. If the bus does not save successfully, use the error messages to resolve errors and attempt to save the bus again.
- ➢ After saving a bus, a blank bus form will be displayed and the user may continue entering buses. Complete and save a separate bus form for each bus.
- ➢ When all buses have been entered and saved, return to the Bus Purchase Approval form to check that the entered buses are all in SAVED status. You may need to refresh the Bus Purchase Approval form page in your browser to see the buses, or you can re-select: Forms --- Official --- Form BP: Bus Purchase --- Bus Purchase Approval Form.

Notes:
- • Use the Tab key or left-click with the mouse to navigate through the items on the bus form, and to get to the 'Save this Bus Information' button at the bottom of the form. *Do not use the Enter key*.)
- • Buses purchased during a school fiscal year should be entered into the SAMS system for the same claim year; for example, buses purchased during 2017-18 should be entered into 2017-18 SAMS. It is feasible to enter buses into SAMS in the school fiscal year after the purchase; however, districts are strongly discouraged from 'holding' purchase documentation rather than entering purchased buses into SAMS right away. (Districts may enter buses purchased in 2016-17 into 2017-18 SAMS if SA-16s for these buses have not yet been sent to SED and entered by SED staff.)
- • Starting with 2018-19 SAMS, the SAMS Bus Purchase system will be available when SAMS is released in July of the new claim year.

Entity Info | Claims Review | Forms | Claim Verifications | Admin | Activity Log | Reports | Subsystems

You Have Selected the 'Official' Data Area.

Print Legacy | Print RefKey | Print Form | Print Blank | Print Text Only

District Name: RAVENA-COEYMANS-SELKIRK CSD	District Code: 010402
Contact Person: JOANNE MORAN	Telephone: (518) 756-5200
	Tel Extension: 6019

Bus Purchase Approval Data

Note: Click On A Bus Number Below To View The Bus Form. To View All Bus Form Data For All Buses With An Aid Start Year Of 2017-2018 Or Later, Select "Reports" From The Main Menu, Then Bus Purchase Reports → Bus Detail Report.

Bus Number	Vin Number	Gross Cost	PO Date	Status	Status Date	Approved Cost For Aid	Certified Date	READY? ☐ (ALL)
0304	1BAKFCBA7HF330509	121602	10/31/2016	CERT	08/22/2017	121602	08/22/2017	
0305	1BAKFCBA3HF330510	121602	10/31/2016	CERT	08/22/2017	121602	08/22/2017	
0306	1BAKFCBA5HF330511	121602	10/31/2016	CERT	08/22/2017	121602	08/22/2017	
0307	1BAKFCPAXHF330741	115728	10/31/2016	CERT	08/22/2017	115728	08/22/2017	
0308	1BAKFCPA1HF330742	115728	10/31/2016	CERT	08/22/2017	115728	08/22/2017	
0309	1BAKFCPA3HF330743	115728	10/31/2016	CERT	08/22/2017	115728	08/22/2017	
0310	1BAKFCPA5HF330744	115728	10/31/2016	CERT	08/22/2017	115728	08/22/2017	

Add New Bus Information

Ready Selected Buses For Superintendent Certification

Step 2b: Review the bus form(s)

➢ *Buses should be reviewed carefully prior to certification because after certification, only the superintendent can revise the bus form.*
➢ Click on the number of the bus to review from the left-most column of the Bus Purchase Approval form.
➢ Review the information on the bus form when it is displayed and continue the process.

Step 2c: Edit one or more bus forms (if necessary)

➢ Click on the number of the bus to edit in the left-most column of the Bus Purchase Approval form; the selected bus form will appear.
➢ Click on the 'Edit Bus' button at the bottom of the bus form and revise items as needed.
➢ When done revising, tab to the 'Save and Submit Changes' button at the bottom of the form and save the changes.

Notes:
- A bus can be edited regardless of current status; however, only the superintendent can edit bus information after a bus has been certified.
- Although a bus can be edited regardless of current status, *once a bus is saved, the bus number, VIN and PO date can never be changed.* The combination of these three data items creates a unique identifier for the bus to ensure that the same bus is not entered more than once. If the user becomes aware that one or more of these three data items must be revised, the bus must be deleted from the system and re-entered with the correct bus number, VIN and PO date.
- If a bus is in READY status prior to editing, it will return to SAVED status after editing, and the user must ready the bus for certification again.
- If a bus is in CERTIFIED status prior to editing, the status will change to REV_AFTER_CERT upon saving changes.
- If a bus is in REV_AFTER_CERT status prior to editing, saving changes will not change the status.
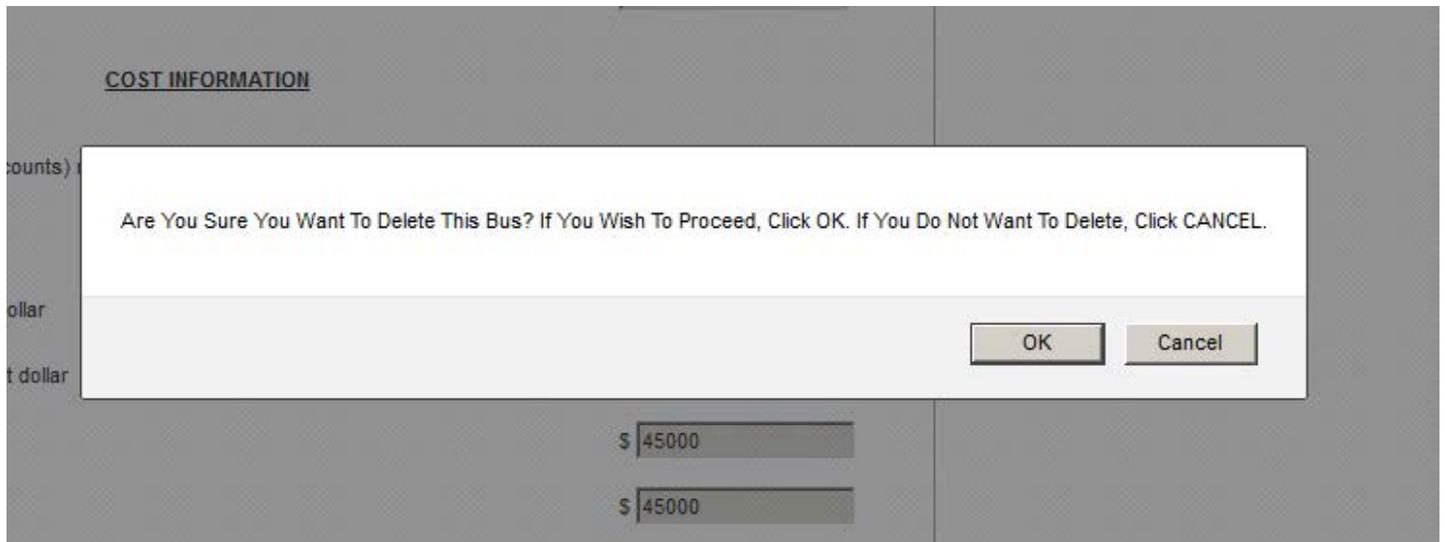
Step 2d: Delete one or more buses from the Bus Purchase System (if necessary)

➢ Only a Superintendent can delete a CERTIFIED or REV_AFTER_CERT bus.
➢ Click on the number of the bus to delete in the left-most column of the Bus Purchase Approval form; the selected bus form will appear.
➢ Click on the 'Edit Bus' button at the bottom of the bus form.
➢ Click on 'Delete this Bus' at the bottom of the bus form.
➢ If the bus is in the SAVED or READY status, user will need to click 'OK' or 'Cancel' when prompted to confirm the deletion.
➢ If the bus is in the CERTIFIED or REV_AFTER_CERT status, user will be prompted to enter a brief explanation in the comment box for why the bus is being deleted. After entering the comment, click again on 'Delete this Bus' at the bottom of the form, and choose OK or Cancel when prompted.

Notes:
- User will need to delete rather than edit a bus if the bus number and/or VIN and/or purchase order date are incorrect. If any of these three items is incorrect for a bus in any of the four possible bus status', the bus cannot be edited. It must be deleted and re-entered.
- If a bus is successfully deleted, it will no longer appear on the Bus Purchase Approval Form, or be displayed on the Bus Detail Report or generate aid - even if it was certified prior to deletion.
- Deleting a bus that is in CERTIFIED or REV_AFTER_CERT status results in deletion of all Transportation Aid associated with all years of the assumed amortization that was established for the bus when certified.

Deleting buses: Prompt to confirm or cancel the deletion of a bus in SAVED or READY status

COST INFORMATION

Are You Sure You Want To Delete This Bus? If You Wish To Proceed, Click OK. If You Do Not Want To Delete, Click CANCEL.

OK   Cancel

$ 45000

$ 45000

Deleting buses: Prompt to explain the deletion of a bus in CERTIFIED or REV_AFTER_CERT status

COST INFORMATION

An Explanation Of Why This Bus Is Being Deleted Is Required In The Bus Comment Field Before Deleting A Certified Bus Record. Please Provide The Reason for Deleting This Bus Record.

OK

$ 111703

$ 111703

Deleting buses: Prompt to confirm or cancel the deletion of a certified bus, or a bus that has been revised after certification

COST INFORMATION

Deleting A Bus Purchase Record That Has A Status Of 'Certified' Or 'Revised After Certified' Will Result In The Deletion Of Transportation Aid Calculated For All Years Associated With The Amortization Of This Bus Purchase. If You Wish To Proceed, Click OK. If You Do Not Want To Delete This Record, Click CANCEL.

OK   Cancel

$ 111703
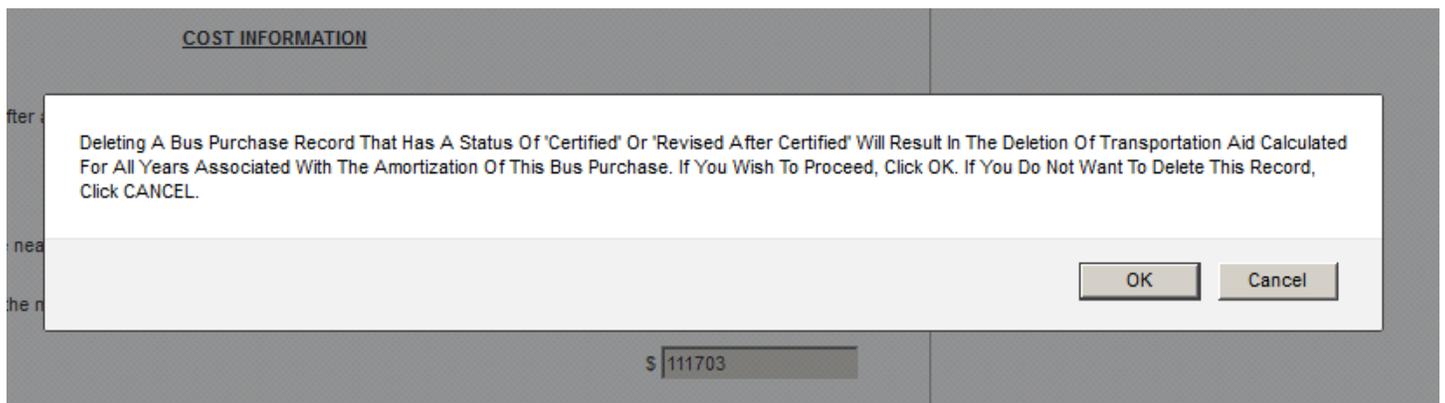
Step 3: Ready one or more buses for certification

Every bus must be successfully saved before it can be given the 'Ready' status, and every bus must be given the 'Ready' status before it can be certified by the superintendent. When the user assigns the 'Ready' status to one or more buses, it means that all the bus data has been reviewed for accuracy and completeness and is ready for submission to SED. To ready one or more saved buses, go to the Bus Purchase Approval form:

➢ In the right-most column of this form (the READY column), click on each individual bus that should be readied for certification
➢ Click the button on the bottom: 'Ready Selected Buses for Superintendent Certification.'

OR

➢ If all saved buses can be readied, click the small box at the top of the READY column to ready all saved buses
➢ Click the button on the bottom: 'Ready Selected Buses for Superintendent Certification.'

Note:
• After editing a saved bus, and saving the bus after editing, a "Ready Bus' button appears at the bottom of the bus form. That individual bus may be assigned the READY status directly from the bus form.

Bus Purchase Approval Data

Note: Click On A Bus Number Below To View The Bus Form. To View All Bus Form Data For All Buses With An Aid Start Year Of 2017-18 Or Later, Select "Reports" From The Main Menu, Then Bus Purchase Reports → Bus Detail Report.

Bus Number	Vin Number	Gross Cost	PO Date	Status	Status Date	Approved Cost For Aid	Certified Date	READY? ☐ (ALL)
0304	1BAKFCBA7HF330509	121605	10/31/2016	REV_AFTER_CERT	10/03/2017	121605	08/22/2017	
0305	1BAKFCBA3HF330510	121602	10/31/2016	CERT	08/22/2017	121602	08/22/2017	
0306	1BAKFCBA5HF330511	121602	10/31/2016	CERT	08/22/2017	121602	08/22/2017	
0307	1BAKFCPAXHF330741	115728	10/31/2016	CERT	08/22/2017	115728	08/22/2017	
0308	1BAKFCPA1HF330742	115728	10/31/2016	CERT	08/22/2017	115728	08/22/2017	
0309	1BAKFCPA3HF330743	115728	10/31/2016	REV_AFTER_CERT	10/03/2017	115728	08/22/2017	
0310	1BAKFCPA5HF330744	115728	10/31/2016	CERT	08/22/2017	115728	08/22/2017	
1459	10293849102938475	64000	09/13/2017	SAVED	10/03/2017	63938		☐
8765	09876543098765432	56701	08/29/2017	SAVED	10/04/2017	56701		☐
8901	11223344112233445	24000	09/12/2017	SAVED	10/04/2017	24000		☐

Add New Bus Information

Ready Selected Buses For Superintendent Certification

Step 4: Certify one or more buses

A bus is not approved for Transportation Aid until it has been certified by the superintendent. Buses in CERTIFIED or REV_AFTER_CERT status have been approved for aid; no additional action is needed by SED or the district (unless SED contacts the district for substantiating documentation). There is no connection between the CERTIFIED status of a bus and the CERTIFIED status of the Form FT or any other SAMS form set; the BP system functions as an independent sub-system of Core SAMS.

To certify, from the SAMS Main Menu the superintendent should choose:
- Forms
- Official
- Form BP: Bus Purchase
- Bus Purchase Certification Form
- In the right-most column of the table displaying readied buses, click on each individual bus that should be certified
- Click the button on the bottom: 'Certify Selected Buses.'

<center>**OR**</center>

- If all readied buses can be certified at once, click the small box next to 'Certify (ALL)'
- Click the button on the bottom: 'Certify and Submit.'

Note: Once certified, the user may verify certification by viewing the certified date that appears at #26 on the bus form and/or in the 'Date Certified' column of the Bus Detail Report.

Bus Purchase Certification Form

This certification form must be completed using the State Aid Management System. In accordance with the Electronic Signatures and Record Act (ESRA), an electronic signature is an electronic sound, symbol or process, attached to or logically associated with an electronic record and executed and or adopted by a person with the intent to sign the record. An electronic signature is considered to be attached to or logically associated with an electronic recording if the electronic signature is linked to the record during the transmission and storage. Therefore, when clicking on the Certify button below, such process shall be considered the electronic signature of the Superintendent of Schools or in the case of a city school district with a population of one million or more, the electronic signature of the Chancellor.

AFFIDAVIT OF SUPERINTENDENT OR CHANCELLOR

I, undersigned Superintendent of Schools, or the Chancellor, of this school district for which the following report is made, do attest that to the best of my knowledge, information, and belief:
1. The data entered in this Bus Purchase Approval Form are accurate and complete;
2. The data entered was visually compared with data from the Purchase Order, Itemized Options statements and Invoice and deemed to be correct;
3. If not purchased under the State Contract, the bus described was duly advertised and bid in accordance with the provisions of General Municipal Law (Sections 103 and 119);
4. The bus was purchased with valid voter approval or a valid board resolution (for city school districts or emergency bus purchase);
5. The bus described in this form meets the requirements and regulations of the New York State Department of Transportation and has been inspected and approved by the Department of Transportation for use in transporting pupils; and
6. The district will maintain for such time as required by law or regulation, and will make available upon SED request for claim verification, the records and documentation related to this bus purchase that substantiate the attestations made in items #1 through #5 above.

Bus Number	Vin Number	Gross Cost	PO Date	Status	Status Date	Approved Cost For Aid	Certify? ☐ (ALL)
0001	01234567890123456	45000	09/26/2017	READY	10/05/2017	35000	☐

Certify & Submit

SAMS Bus Purchase System Reports

District users have access to three reports in the SAMS Bus Purchase System. To choose a report, mouse over:

 ➢ 'Reports' from the SAMS main menu bar, then mouse over
 ➢ 'Bus Purchase Reports'
 ➢ Click on the desired report

Users can receive an MS Excel version of each report via email by selecting 'Export this Data to CSV' at the bottom of each report. Below is a description of each report.

Buses Generating Aid on TRA Output Report

This report displays data related to assumed amortizations for all approved buses generating Transportation Aid in the current aid year, regardless of when the bus was purchased. The total aidable expense for buses in the current aid year is the sum of the amounts displayed in the first column of Assumed Aidable Debt Service (6th column of the report) Where applicable, assumed aidable debt service for the remaining years of each amortization generating aid in the current year also is displayed for user reference.

The sum of the Assumed Aidable Debt Service (AADS) for buses with the '1st year of Aid' in an aid year prior to the current aid year should equal the amount at item #41 on the current aid year's TRA report. The sum of the AADS for buses with the '1st Year of Aid' in the current aid year should equal the amount at item #42 on the current aid year's TRA report. For example, the amount displayed at item #41 on the 2017-18 TRA should be $158,714, and the amount displayed at item #42 should be $49,750.

ASSUMED AMORTIZATION DETAILS FOR ALL APPROVED BUSES GENERATING AID IN 2017-18

Bus Number	Purchase Order Date	Approved Cost for Aid	1st Year of Aid	Assumed Semi-Annual Payment	2017-18 Assumed Aidable Debt Service	2018-19 Assumed Aidable Debt Service	2019-20 Assumed Aidable Debt Service	2020-21 Assumed Aidable Debt Service	2021-22 Assumed Aidable Debt Service	2022-23 Assumed Aidable Debt Service
0131	07/18/2016	109795	2017-2018	11437	22874	22874	22874	22874	22874	0
0132	07/18/2016	128998	2017-2018	13438	26876	26876	26876	26876	26876	0
0123	07/06/2012	100535	2013-2014	10438	20876	0	0	0	0	0
0124	07/01/2013	98462	2014-2015	10222	20444	20444	0	0	0	0
0125	07/01/2013	98462	2014-2015	10222	20444	20444	0	0	0	0
0126	08/31/2014	108145	2015-2016	11266	22532	22532	22532	0	0	0
0127	08/31/2014	104412	2015-2016	10877	21754	21754	21754	0	0	0
0128	08/31/2014	100412	2015-2016	10460	20920	20920	20920	0	0	0
0129	09/11/2015	44681	2016-2017	4654	9308	9308	9308	9308	0	0
0130	07/01/2015	107684	2016-2017	11218	22436	22436	22436	22436	0	0

Export This Data To CSV

Buses Generating Aid on TRA EST Output Report

This report displays data related to assumed amortizations for all approved buses generating Transportation Aid in the projected aid year, *if* the purchase date is prior to July 1 of the current aid year. The total aidable expense for the projected aid year is the sum of the amounts displayed in the first column of Assumed Aidable Debt Service (6th column of the report; item #19 on the TRA EST output report) and the projected assumed aidable debt service associated with current year bus purchases reported at SAMS Form FT #164 and #165. Where applicable, the remaining years of each amortization generating aid in the projected year also is displayed for user reference.

ESTIMATED ASSUMED AMORTIZATION DETAILS FOR ALL APPROVED BUSES PROJECTING AID IN 2018-19

Bus Number	Purchase Order Date	Approved Cost for Aid	1st Year of Aid	Assumed Semi-Annual Payment	2018-19 Assumed Aidable Debt Service	2019-20 Assumed Aidable Debt Service	2020-21 Assumed Aidable Debt Service	2021-22 Assumed Aidable Debt Service	2022-23 Assumed Aidable Debt Service	2023-24 Assumed Aidable Debt Service
0131	07/18/2016	109795	2017-2018	11437	22874	22874	22874	22874	0	0
0132	07/18/2016	128998	2017-2018	13438	26876	26876	26876	26876	0	0
0124	07/01/2013	98462	2014-2015	10222	20444	0	0	0	0	0
0125	07/01/2013	98462	2014-2015	10222	20444	0	0	0	0	0
0126	08/31/2014	108145	2015-2016	11266	22532	22532	0	0	0	0
0127	08/31/2014	104412	2015-2016	10877	21754	21754	0	0	0	0
0128	08/31/2014	100412	2015-2016	10460	20920	20920	0	0	0	0
0129	09/11/2015	44681	2016-2017	4654	9308	9308	9308	0	0	0
0130	07/01/2015	107684	2016-2017	11218	22436	22436	22436	0	0	0

Export This Data To CSV

Bus Detail Report

For every CERTIFIED bus with an aid start year of 2017-18 or later, this report displays all data items entered into the SAMS bus form and details of the assumed amortization schedule. The report is not aid year specific; that is, regardless of the SAMS year selected (2017-18 SAMS and subsequent years), this report will show information for all purchased buses for which aid began in 2017-18 or later.

This report is 38 columns wide. For optimal use of this report, it is recommended that the user select 'Export This Data to CSV' and work with the report in MS Excel.