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TO: State Aid Designees

FROM: Andrea Hyary

SUBJECT: Transition to new online SAMS Bus Purchase Approval System

DATE: June 12, 2017

Dear Colleague:

This is to notify you that a new online bus purchase approval system is being incorporated into the State Aid Management System (SAMS) beginning with 2017-18 SAMS. The new system will be available in 2017-18 SAMS later this summer.

***Here is what SED is requesting from districts at this time:***

1. Please do not be concerned that you have not received paper bus purchase approval letters in response to SA-16 forms submitted for buses purchased since 7/1/16. ***No approval letters will be mailed for these buses, but this does not mean that the buses will not be approved:*** Before the new system is released this summer, SED will enter/approve these buses in the new bus purchase system to generate Transportation Aid in 2017-18.
2. ***Buses with PO dates between 7/1/16 and 6/30/17 for which SA-16 forms have not yet been submitted to SED: You may continue to send SA-16 forms to the State Aid Office for buses purchased during 2016-17;*** SED will enter/approve these buses in the new bus purchase system but the district will not receive approval letters. Later this summer SED will notify districts of a 'cut-off' date for submitting paper SA-16s, after which districts will be required to enter the buses into the new system.
3. ***Buses with PO dates on or after 7/1/17: Please do not send any SA-16 forms or any other documentation to State Aid.*** The district will be required to enter information for all these buses into the new system for the buses to generate Transportation Aid (These buses do not generate aid until 2018-19.)
4. ***Buses with PO dates on or after 7/1/17: Please retain and have available all purchase documentation for these buses.*** Although SED will no longer collect this information for every bus, the information will be requested from selected districts to verify bus purchase claims.
5. ***Please keep an eye out this summer for subsequent communications from the State Aid Office regarding this transition.***

***Here is an overview of how the new SAMS Bus Purchase system will work when fully implemented:***

1. Districts will no longer submit paper bus purchase forms (SA-16). In the new SAMS system, districts will complete a form for each bus purchased that is very similar to, but not exactly the same as the paper SA-16 form.
2. Districts will select the Bus Purchase module from the main menu in SAMS to enter information about new buses.
3. While entering information on the SAMS bus purchase form, the system will notify the user if invalid data has been entered.
4. If no 'validation rules' have been violated, the user will be able to save the bus purchase form in SAMS.
5. Upon successfully saving a bus purchase form, the approved cost for aid will be automatically calculated and displayed on the bus purchase form.
6. For the bus to be approved for aid, the superintendent must electronically certify to the accuracy of the data on the form; however, the superintendent will be able to certify multiple buses at the same time if more than one bus purchase form has been saved.
7. Districts will be able to see via the system that a bus has been successfully certified and is in the 'Certified' status.
8. When a bus has reached the certified status, it means that the bus has been approved for aid; districts will no longer receive a paper approval letter.
9. Districts will no longer submit any paperwork to the State Aid office to support the information on every bus purchase form. However, districts must keep substantiating documentation available on file as required by NYS Archives Records Retention and Disposition Schedule ED-1 ([http://www.archives.nysed.gov/records/retention\\_ed-1](http://www.archives.nysed.gov/records/retention_ed-1)). The State Aid office will solicit such documentation from selected districts each year, via the existing SAMS claim verification process and/or on an ad hoc basis.
10. There will be no substantive change to the TRA or TRA EST output reports due to the change to automated bus purchase approval.
11. The report listing all buses generating Transportation Aid each year that currently is embedded as a link in the TRA and TRA EST output reports will still be available to districts, as well as additional reports.
12. Information for buses generating aid in 2016-17 and earlier aid years, referred to as 'legacy buses,' has been imported into the new system; in the new system districts will be able to view reports containing information about both legacy and new buses.

This is the first of several communications you will receive this summer about the transition to the new system. To assist the State Aid Office with this implementation, please email all questions, concerns and problems during the transition to this mailbox: [BUSPURCH@nysed.gov](mailto:BUSPURCH@nysed.gov). Please include your district name in the subject line.

***We know how very busy you are, and we thank you in advance for your patience and cooperation as we automate and streamline the bus purchase approval process.***