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The Division of Financial Operations (DFO) is committed to providing supports and services to schools, central and field offices, and all DOE employees.

As part of this commitment, The Related Services Unit within DFO has created the following list of frequently asked questions and answers for related services providers:

Related Services Providers: Frequently Asked Questions

Program Requirements

Q. Must I be fingerprinted and cleared through the Personnel Eligibility Tracking System (PETS) before rendering services?

A. Yes. All providers are required to have current and cleared fingerprints on file with the New York City Department of Education (DOE).

Q. What is required to become a related services provider?

A. All providers must possess appropriate licensure, as defined by the New York State Education Department and the DOE. Credentials must be reviewed and approved by the DOE prior to commencement of service. All providers must also be registered, and reflected as active and eligible in the DOE's PETS system in order to be authorized to provide services and to invoice the DOE for such services. Providers must maintain all such clearances for the full duration of the service provision and/or access to student records. For further information, including a list of all required credentials, see the [Application for School-Aged Related Service Providers](#).

Q. Who can I contact if I have a question about the PETS clearance process?

A. Contact Rita Venekas of the Office of Related Services, Division of Specialized Instruction and Student Support (DSISS): rveneka@schools.nyc.gov.

Q. I am a new provider. How do I become a registered vendor with the New York City Comptroller's Office?

A. All providers must complete a [W-9 Form](#) in order to be registered as a vendor with the New York City Comptroller's Office. Providers cannot bill the DOE until they are registered with the Comptroller's Office. For further information, see [Instructions for Completing the W-9 Form](#). Please submit the completed W-9 Form to the DOE via mail or fax:

Mail: Non-Public Schools Payable
NYC Department of Education
65 Court Street, Room 1001
Brooklyn, NY 11201

Fax: (718) 935-3801
Attn: W-9

Once submitted, please allow up to four (4) weeks for processing. A Non-Public Schools Payable representative will contact you once your W-9 Form is approved.

Q. How do I bill/invoice the DOE for the services that I provided?

A. All related services providers — including both agencies and independent providers — are required to use the online Vendor Portal invoicing system (VPortal) for all transactions.

Q. Since I am billing electronically through the Vendor Portal, do I still need to maintain hardcopy invoices?

A. Yes. Although you are billing electronically, you must retain hard copy invoices which must be signed by you the provider as well as either the parent or principal, depending on where the service was rendered. You must maintain and produce all records that support service provision and billing for possible audit or other review. These records may include provider/employee/consultant time and payroll records. Providers are expected to cooperate with all government investigations. Note that records must be retained for six years from the date the Related Service Authorization Form 2 (RSA-2) was approved by the DOE, the date the record was created, or the date of transmission or entry into DOE systems, whichever is latest, or longer if specifically required by the DOE.

Vendor Portal (VPortal)

Q. What is the Vendor Portal and why should I register for it?

A. The Vendor Portal is a web-based application that allows vendors to:

- Submit their invoices
- View their transactions & payment history
- Manage their account information

The DOE requires all related service providers to submit invoices for services via the Vendor Portal. Paper-based invoices will not be accepted for payment.

Q. Is there a Vendor Portal user guide?

A. Yes. Our user guide, accessible on the Vendor Portal home page, is entitled [A Guide to Submitting Invoices for Related Services and SETSS via the Vendor Portal](#).

Q. How do I register to use the Vendor Portal?

A. To register for the Vendor Portal, please follow the instructions in chapter 2, pages 7-9 of the [Vendor Portal user guide](#).

Q. I am an independent provider. How do I invoice the DOE using the Vendor Portal?

A. To invoice using the Vendor Portal, click [independent provider](#) and follow the instructions in chapter 7, pages 30-37 of the Vendor Portal user guide.

Q. I am an independent agency and have many students to invoice for. What is the quickest way to invoice using the Vendor Portal?

A. To invoice in Vendor Portal as an [independent agency](#) with many children, follow the instructions in chapters 3 through 6, pages 10-29 of the Vendor Portal user guide.

Q. I do not see my student listed in the Vendor Portal. What should I do?

A. Contact the issuing district (i.e., the CSE, CFN, or D75). If you are inquiring about a mandate for services rendered prior to September 1, 2014, please contact our [office: NPSPPaymentInquiries@schools.nyc.gov](mailto:NPSPPaymentInquiries@schools.nyc.gov).

Q. How can I tell which student I was paid for?

A. Log into the Vendor Portal and select RSA/SETSS Invoice. Click on the details icon () to view a list of student names along with the amounts paid.

Q. What are “units” in Vendor Portal?

A. For most services, units represent half hour increments of service provided. The exception is paraprofessional service; this type of service is billed at an hourly rate.

Q. What is an NPI number and do I need one?

A. NPI stands for National Provider Identifier number. All related service providers - for example, physical therapists, occupational therapists, speech therapists - must possess an NPI number. NPI numbers are not required for SETSS providers. If you are a related services provider and you have yet to apply for an NPI number, please do so now via the [National Plan & Provider Enumeration System](#). This number is required in order to submit an invoice in the Vendor Portal.

Q. Where do I enter my NPI number in the Vendor Portal?

A. To enter an [NPI number](#), follow the instructions in chapter 9, pages 44-52 of the Vendor Portal user guide.

Billing (Invoicing)

Q. When can I start providing services to a student?

A. In order to commence services, you must first obtain an RSA-2 Form signed by the authorized DOE Representative (i.e., the CFN, CSE, or D-75). For mandates issued prior to September 1, 2014, a transaction number is required in order to bill the DOE. If the RSA was issued manually (i.e., hand written as opposed to generated via SESIS Provider Assignment), the RSA-2 Form must include a transaction number.

Q. How is a transaction number generated for a manual (handwritten) RSA that was issued prior to September 1, 2014?

A. A transaction number is automatically generated by the Vendor Portal once the DOE representative (from the CFN, CSE, or D-75) enters the information from the manual (handwritten) RSA form into the system. Once generated, the DOE representative must record the transaction number on the RSA-2 form and sign it before returning it to you.

Q. What should I do if my manual (handwritten) RSA form does not include a transaction number?

A. If your manually generated (handwritten) RSA for services prior to September 1, 2014 does not include a transaction number, contact the DOE representative from the issuing office. Without a transaction number, you cannot serve the student in question or submit an invoice to the DOE.

Q. I am a related service provider. Do I need to provide my first attend date?

A. Yes. All related service providers must provide the service first attend date in order to invoice the DOE.

Q. How do I enter my first attend date into the Vendor Portal for mandates that were issued for services prior to September 1, 2014?

A. Instructions for entering the first attend date in the Vendor Portal can be found in the [Vendor Portal First Attend Date Instructions](#) document.

Q. How do I enter my first attend date into the SESIS Provider Assignment module for mandates that were issued for services after September 1, 2014?

A. Instructions for entering a first attend date into the SESIS Provider Assignment module can be found on the [SE SIS Training Materials for Related Service Providers](#) page of the DOE website.

Q. Do I still need to call in my first attend date using SEC/IVR?

A. You do need to record your first attend date in order to be paid, but this is no longer done using the SEC/IVR system. The first attend date is now done elsewhere, dependent upon when your mandates were issued. For manual (handwritten) mandates issued prior to September 1, 2014, you must record your first attend date in Vendor Portal; for mandates issued September 1, 2014 or after, record your first attend date in SESIS Provider Assignment.

Q. I entered the first attend date in the Provider Assignment system but I still do not see my student in the Vendor Portal.

A. After entering the first attend date in the Provider Assignment system, please wait 24 hours for the student to appear on your caseload list within the Vendor Portal. If after 24 hours the student still does not appear in the Vendor Portal, please inform the appropriate representative:

- For CFN students, contact Seth Gold (sgold6@schools.nyc.gov)
- For CFN CSE/CPSE students, contact Tina Arbetinos (TArbeti@schools.nyc.gov)

Q. Where can I find a record of the RSA invoices I have been paid for?

A. To view the list of invoices that have been paid, log on to the [Vendor Portal](#) and do the following:

- Click RS/SETSS Invoice found in the right-hand navigation menu. The Invoice Status page will appear.
- Click Search found on the top right menu bar.
- In the Fiscal Year field, select the desired fiscal year from the drop-down menu. Click Retrieve. A list of all invoices paid during the period will appear.
- Click the icon to the right of the desired invoice number (found in the Details column). Payment details associated with the invoice will display, including the total amount paid as well as the amount paid for each individual student.

Q. I am one of two providers at the school who works with a particular child. Are we both permitted to bill for services rendered on the same day for the same child?

A. Yes, you are both permitted to bill for services rendered to the same child on the same day. However, two or more providers cannot bill for services rendered at the same time of day (i.e., your session start and end times must be different from one another's).

Miscellaneous

Q. Is there a fee associated with receiving payments by paper checks?

A. Yes. As of January 1, 2011, the New York City Department of Finance began charging a \$3.50 fee per paper check issued.

These fees are authorized under the Rules of the City of New York - Title 19, Department of Finance, section 9- 01 of Chapter 9 and are used to cover the costs related to the processing of paper checks and to encourage participation in the Electronic Funds Transfer (EFT) program (also known as direct deposit). Providers enrolled in EFT avoid these fees.

Q. How do I enroll in direct deposit?

A. To enroll in direct deposit, complete the [Direct Deposit/Electronic Funds Transfer \(EFT\) Vendor Payment Enrollment Form](#) found on the New York City Department of Finance website.

Q. My personal information has changed. What must I do?

A. As a provider, any change to your personal information (for example, name change, SSN change, address change, etc.) requires the submission of a new [W-9 form](#). Once completed, fax the form, along with supporting documentation (e.g., marriage certificate, SS card, written statement indicating your old and new address) to our office:

Attn: W-9
(718) 935-3801

Please note that your new information will be validated by the New York City Comptroller's Office.

Q. What is the Payee Information Portal (PIP)?

A. The Payee Information Portal (PIP) is a web-based application operated by the New York City Financial Information Services Agency (FISA). PIP allows vendors to manage their own account information and view their financial transactions with the City of New York.

Q. How do I sign up for PIP? Who should I contact if I have questions pertaining to PIP?

A. In order to use PIP, you must create an account. This can be accomplished on the [Payee Information Portal website](#).

Technical questions pertaining to PIP should be directed to FISA via [email: pip@fisa.nyc.gov](mailto:pip@fisa.nyc.gov). Please include your business name, phone number, and vendor code in your communication.

Questions about payments should be directed to the DOE's Non Public School Payables (NPSPP) Unit either via telephone - (718) 935-2760 – or via email – NPSPPaymentInquiries@schools.nyc.gov.

Web links referenced in this document:

- Application for School-Aged Independent Related Service Providers: <http://schools.nyc.gov/NR/ronlyres/8D4EB3AE-5A7C-4B6C-BDE0-8F96246D91FD/0/ApplicPRS012014.pdf>
- Payee Information Portal (PIP): <https://a127-pip.nyc.gov/webapp/PRDPCW/SelfService>
- W-9 Form: http://comptroller.nyc.gov/wp-content/uploads/2014/12/SUBSTITUTE-FORM-W-9_NYC_December-2014.pdf
- W-9 Form Instructions: http://comptroller.nyc.gov/wp-content/uploads/2014/12/NYC_Substitute-W9_Instructions_December-2014.pdf
- DOE's Guide to Submitting Invoices for Related Services and SETSS via the Vendor Portal: https://vendorportal.nycenet.edu/RSInvoiceProcessing/help_files/Related%20Service%20Integrated%20Invoice%20Processing%20User%20Guide.pdf
- National Plan & Provider Enumeration System (NPPES): <https://nppes.cms.hhs.gov/NPPES/Welcome.do>
- Vendor Portal First Attend Date Instructions: <http://schools.nyc.gov/NR/ronlyres/CF9E4B34-3ACC-42FE-A194-55B8858BF539/0/RelatedServiceFirstAttendInstructions.pdf>
- SESIS Training Materials for Related Service Providers: http://schools.nyc.gov/Academics/SpecialEducation/ContactsResources/SESI_S_NonDOE
- Vendor Portal: <https://vendorportal.nycenet.edu/vendorportal/login.aspx>
- Direct Deposit/Electronic Funds Transfer (EFT) Vendor Payment Enrollment Form: http://www1.nyc.gov/assets/finance/downloads/pdf/treasury/eft-direct_depost_appl.pdf