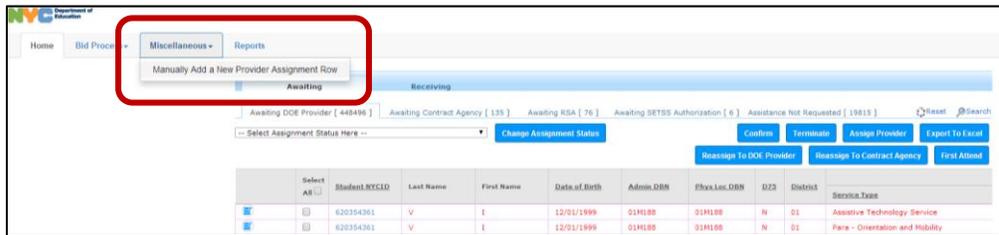


Manually adding a mandate in Provider Assignment can be completed either by selecting “Manually Add a New Provider Assignment Row” from the *Miscellaneous* link at the top of the Provider Assignment Main Screen, or by clicking on **Manually add a New Provider Assignment Row** from the *Summary of Student Mandates* window.

### Creating a Mandate from the Provider Assignment Main Screen

- ❑ Click Miscellaneous at the top of the screen and select “Manually Add a New Provider Assignment Row.”



- ❑ Input the Student NYCID and click on the **Retrieve** button.

The system will populate the available student and IEP information. All of the fields necessary to add a new mandate will be available for editing. Refer to screen sample below.

**STUDENT:**

Student NYCID:

Student First Name: John      Student Last Name: Doe      DOB: mm/dd/yyyy

Attending Admin DBN: 06M187      Auth Admin DBN: 06M187      CSE: C503      Grade: 05

Attending Phys Location DBN: 06M187      Auth Phys Location DBN: 06M187      CSE District: 06      Home District: 05

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**IEP:**

IEP ID: 1234567      IEP Conference Date: mm/dd/yyyy      Parentally Placed: No

Source Document Type: IEP      IEP Authorization Date: mm/dd/yyyy      Initial Case: No

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**MANDATE:**

Is this a Compensatory Service?       10 month / 2month:       Service Type:

Is this for an Interim Monolingual Provider?

Service Authorization Date:       Language:

Indiv/Group:       Frequency:       Duration:

Group Size:       Frequency Terms:       Duration Terms:

Reason for Manually Creating New Row:

If the system determines that the student is inactive or has been discharged, that information will be displayed in **red** text. You can continue to add the mandate or cancel. Refer to the screen sample below.

## Provider Assignment Process Checklist

### Adding or Removing a Mandate in Provider Assignment



If the system is unable to populate student information and/or the IEP, IESP, SP or CSP information, you will be able to enter this data. Refer to the yellow highlighted fields. This will only be required for the first mandate manually entered for the student. See the screen sample below.

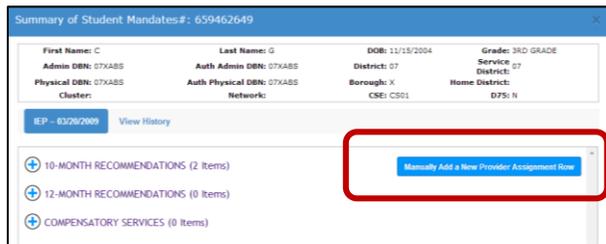
To enter the mandate:

- Select from the values provided in the drop-down lists.
- Complete all of the mandate fields including the Reason for Manually Creating New Row field.
- Click **Add New Row** to add the mandate to the **Awaiting DOE Provider** sub-tab's service recommendation grid with an Assignment Status of "Awaiting DOE Provider."

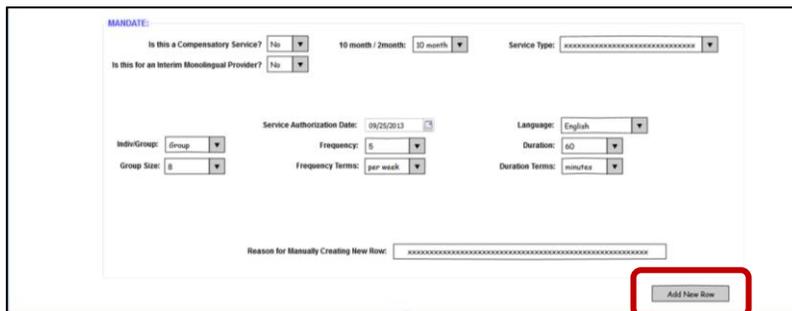
- If appropriate, change the Assignment Status to “Requested Contract Agency” to move the mandate to the **Awaiting Contract Agency** sub-tab.

### Creating a Mandate from the Summary of Student Mandates Screen

- Navigate to the **Awaiting** or **Receiving** sub-tab where the student mandate resides and search for the student’s mandate(s).
- In the service recommendation grid, click on the *Student NYCID* link to display the *Summary of Student Mandates* screen. Click **Manually Add a New Provider Assignment Row**, and the system will display information related to the student and all the data fields necessary to add a new mandate.



- Select from the values provided in the drop-down lists.
- Complete all of the mandate fields including the *Reason for Manually Creating New Row* field.
- Click **Add New Row** to add the mandate to the **Awaiting DOE Provider** sub-tab’s service recommendation grid with an *Assignment Status* of “Awaiting DOE Provider.”



### Removing a Mandate Before an Agency or Provider Has Been Assigned

In order for a mandate to be deleted from the service recommendation grid, the mandate **must** be located on an **Awaiting** sub-tab and have an Assignment Status of

- “Awaiting DOE Provider”,
- “Awaiting Contract Agency”,
- “Awaiting RSA”, or
- “Awaiting Authorization for Independent SETSS Teacher.”

- Navigate to the **Awaiting** sub-tab where the student mandate resides and search for the student’s service recommendation.
- Click the checkbox adjacent to the mandate and click **Delete Row**.

The screenshot shows a web application interface with a grid of student mandates. The 'Awaiting' sub-tab is active. A dropdown menu is set to 'Awaiting DOE Provider'. The grid has columns for Select, Student NYCID, Last Name, First Name, Date of Birth, Admin DBN, Phys Loc DBN, D75, District, and Service Type. One row is selected, and the 'Delete Row' button in the toolbar is highlighted with a red box.

Select	Student NYCID	Last Name	First Name	Date of Birth	Admin DBN	Phys Loc DBN	D75	District	Service Type
<input type="checkbox"/>	999999999	Doe	CAROLINE	05/02/1997	02MABS	04M108	N	02	Occupational Therapy
<input type="checkbox"/>	999999999	Doe	CAROLINE	05/02/1997	02MABS	04M108	N	02	Speech-Language Therapy
<input type="checkbox"/>	999999999	Doe	JORDAN	07/15/2000	02MABS	02MABS	N	02	Counseling Services
<input type="checkbox"/>	999999999	Doe	JORDAN	07/15/2000	02MABS	02MABS	N	02	Occupational Therapy
<input type="checkbox"/>	999999999	Doe	JORDAN	07/15/2000	02MABS	02MABS	N	02	Counseling Services
<input type="checkbox"/>	999999999	Doe	JORDAN	07/15/2000	02MABS	02MABS	N	02	Occupational Therapy
<input checked="" type="checkbox"/>	123456789	Doe	MARC	03/06/1997	02MABS	02MABS	N	02	Speech-Language Therapy
<input type="checkbox"/>	999999999	Doe	OLIVIA	01/24/2006	Z99XAE	Z99XAE	N	Z9	Para - Crisis Management

- In the Delete Row pop-up window that appears, click **OK** to confirm the deletion.

The screenshot shows a 'Delete Row' dialog box with the text: 'You are about to permanently delete the row(s) you have selected from the grid.' There are 'Cancel' and 'OK' buttons at the bottom right, with the 'OK' button highlighted by a red box.

A “Mandate(s) were deleted” confirmation message displays at the top of the screen. The mandate is removed from the grid.

*Note: a mandate which has been split cannot be deleted if any one of the partial mandates is no longer in an “Awaiting” status.*

### Removing a Mandate After a Provider Has Been Assigned

- Navigate to the sub-tab where the student mandate resides and search for the student’s service recommendation.
- Click the checkbox adjacent to the mandate and click **Terminate**.

Select All	Student NYCID	Last Name	First Name	Date of Birth	Admin DBN	Phys Loc DBN	D75	District	Service Type
<input type="checkbox"/>	999999999	Doe	ASHLEY	02/22/2004	02CS09	02CS09	N	02	Speech-Language Therapy
<input type="checkbox"/>	999999999	Doe	ASHLEY	02/22/2004	02CS09	02CS09	N	02	Speech-Language Therapy
<input checked="" type="checkbox"/>	123456789	Doe	ANGEL	09/19/2003	01M315	01M315	N	01	Occupational Therapy
<input type="checkbox"/>	999999999	Doe	JORDAN	09/14/2000	29Q059	29Q059	N	29	S.E. Teacher Support Service (SETSS)

In the Terminate Provider pop-up window that appears, select the reason code of “Mandate Generated in Error” and click **OK**.

*Note: No other reason in the drop-down values will result in the mandate being removed from the grid.*

Student NYCID	Last Name	First Name	Provider	Reason	Other Reason	Termination Date
123456789	Doe	ANGEL	Jacqueline Guadalupe	-- Select a reason -- -- Select a reason -- Uncooperative Parent School was Uncooperative Student No Longer Attending This School Student Cannot be Located Provider no Longer Available Provider Assigned in Error Student Refuses to Attend Session Extended Student Absence (> 20 school days) <b>Mandate Generated in Error</b> Other		08/28/2014

A “Provider was terminated” confirmation message displays at the top of the screen. The mandate is removed from the grid.

### Removing a Mandate which is “Awaiting Provider Confirmation”

To delete a service recommendation with an Assignment Status of “Awaiting DOE Provider Confirmation,” “Awaiting Contract Agency Provider Confirmation,” “Awaiting Independent Provider Confirmation” or “Awaiting Independent SETSS Teacher Confirmation” the assignment must first be *rejected*, then the mandated can be *deleted*.

- Navigate to the Awaiting sub-tab where the student mandate resides and search for the service recommendation(s).
- Click the checkbox adjacent to the mandate(s) and click **Confirm**.

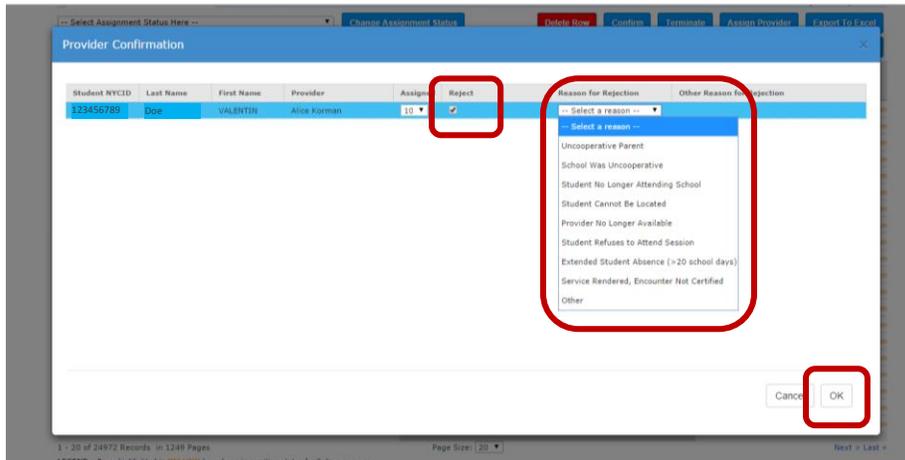
The screenshot shows the 'Awaiting' sub-tab of the Provider Assignment System. The table lists mandates with columns for Student NYCID, Last Name, First Name, Remaining Frequency, Provider, Mandate Status, and Assignment Status. The 'Assignment Status' column for all entries is 'Awaiting DOE Provider Confirmation'. A red box highlights the 'Confirm' button in the top right of the interface.

Select All	Student NYCID	Last Name	First Name	Remaining Frequency	Provider	Mandate Status	Assignment Status
<input type="checkbox"/>	999999999	Doe	YAANIA	3	Alexa Shaughnessy	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	CELINA	5	Amy Haskell	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	DANIEL	3	Cayr Weiss	Unassigned	Awaiting DOE Provider Confirmation
<input checked="" type="checkbox"/>	123456789	Doe	VALENTIN	10	Alice Korman	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	RICKY	10	Katherine Brounstein	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	JADA	3	Cindy Madej	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	ISAAC	5	Denise Sanchez	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	KENSHO	4	Debora Lennon	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	TIARA	5	Veronica Talley	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	ROSLIE	5	Veora Layton	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	ADAM	2	Aliza Fuentes	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	ANTHONY	5	April Huot	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	SEAN	3	Abbey Berns	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	JONATHAN	1	Carolyn Pontone	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	JONATHAN	1	Carolyn Pontone	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	HANNAH	1	Josephine Lombardo	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	HANNAH	2	Susan Miskin	Unassigned	Awaiting DOE Provider Confirmation
<input type="checkbox"/>	999999999	Doe	CURTIS	1	Luz Alvarado	Unassigned	Awaiting DOE Provider Confirmation

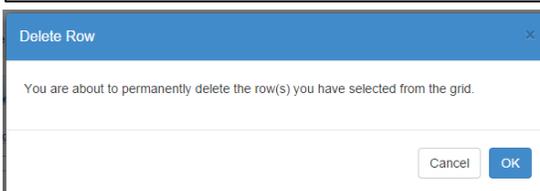
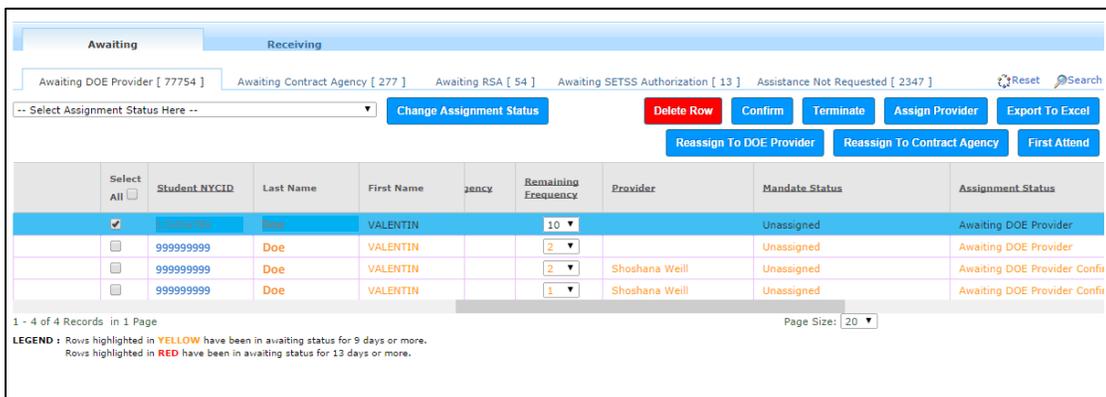
- In the Provider Confirmation window that displays click the Reject checkbox, select a Reason for Rejection and click **OK**. The provider will be removed from the mandate, and the mandate’s Assignment Status will change to “Awaiting Provider.”

## Provider Assignment Process Checklist

### Adding or Removing a Mandate in Provider Assignment



- ❑ Click the checkbox adjacent to the mandate and click **Delete Row**. Click **OK** to confirm the deletion.



The mandate will be removed from the service recommendation grid and a confirmation message will display at the top of the screen: "Mandate(s) were deleted."