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Navigating the Services Recommendations Grid

1. **Q: How do I access Provider Assignment?**
A: Log into SESIS and click Provider Assignment from the SESIS home page.

2. **Q: Can I see more than twenty mandates on each screen?**
A: Yes. Click the desired number of mandates to be displayed from the Page Size drop-down list at the bottom center of the screen. Navigate among the pages of mandates using the Next/Last and First/Prev links.

3. **Q: How are the mandates sorted? How can I change the sort order?**
A: By default, mandates awaiting a provider for the longest amount of time are listed first (i.e. in descending order by the Days column). The mandates may be sorted – either in ascending or descending order – by clicking on an underlined column header. Columns headers not underlined indicate that mandates may not be sorted on that column.

4. **Q: Why are some of the rows in the *Provider Assignment* grid color coded?**
A: The rows highlighted in **Yellow** have been in awaiting status for 9 days or more. The rows highlighted in **Red** have been in awaiting status for 13 days or more.

5. **Q: How do I locate a specific mandate?**
A: Click the *Awaiting* or *Receiving* tab where the mandate resides and complete the Search filters to display the student mandate in which you are interested.

6. **Q: What is the purpose of the *Mandate Status* column?**
A: The *Mandate Status* column indicates how much of the mandate has been assigned a provider: none of it, some of it or all of it.
 - A value of 'Unassigned' indicates that the assignment of a provider is pending.
 - A value of 'Partially Assigned' indicates that the mandate was split, and that a portion of the mandate is pending assignment of a provider.
 - A value of 'Fully Assigned' indicates that all sessions of the mandate have been assigned to one or more providers.



7. Q: What is the purpose of the *Assignment Status* column?

A: The *Assignment Status* column indicates where in the process of assigning a provider the mandate is. For example:

- A value of “Requested Contract Agency” means the mandate is ready to be contracted to a contract agency.
- A value of “Awaiting First Attend” means the mandate has been assigned to a provider.

8. Q: Can I download student mandate information from the service recommendation grid?

A: Yes, click the *Export to Excel* button. You do not need to select specific rows in order for them to be exported; all rows will be exported to Excel.

Contracting Out to a Primary Contract Agency

9. Q: When do I initiate contracting out a service?

A: *When a DOE provider is not available to assign to a mandate.*

10. Q: How do I assign a mandate to a primary contract agency?

A: Click the checkbox on the mandate row and click the *Locate Primary Agency* button.

11. Q: How do I know a mandate has been assigned to a primary contract agency?

A: The mandate’s *Agency* column will contain the name of the primary agency and the *Assignment Status* will be “Awaiting Contract Agency Provider.”

12. Q: If a primary agency is found, how long does the agency have to assign a provider?

A: Five school days.

13. Q: What happens to the mandate if the agency doesn’t assign a provider within the five school days?

A: After five school days the *Assignment Status* on the mandate automatically changes to “Contract Agency Timeout”. A search for a secondary or tertiary contract agency may begin.

14. Q: Can I select multiple mandates and locate the primary agency at one time?

A: Yes you can, but the mandates must contain the same service type, language and district. Click the checkbox for each mandate row and click *Locate Primary Agency*.

15. Q: What should the agency supervisor do if they do not have a provider to assign to the mandate?

A: A button available to primary agency supervisors in Provider Assignment allows the supervisor to reject the case and send it back to the DOE. The mandate’s *Assignment Status* will change to “Contract Agency Rejected.”

16. Q: Does the system alert me when a primary contract agency rejects an assignment?

A: Use the Search feature to filter for an *Assignment Status* of “Contracted Agency Rejected.”

17. Q: After a primary agency timeout or rejection, can I assign the mandate back to the



primary agency?

A: Yes.

18. Q: What do I do if a primary agency cannot be found?

A: A search for a secondary or tertiary contract agency may commence when a primary agency is not found.

Contracting Out to a Secondary or Tertiary Contract Agency

19. Q: Can I select multiple mandates and contract them out to multiple secondary or tertiary contract agencies at one time?

A: Yes. Using the Search Panel on the Awaiting Contract Agency sub-tab, select the service from the Service Type drop-down list. Enter the Authorized Physical Location DBN in the Auth Phys Loc DBN field. Select either "Unassigned", "Partially Assigned" or "Not Fully Assigned" from the Mandate Status field. Select the language from the Language drop-down list. Then click Search. Select the mandate(s) to be contracted out, and click the Locate Sec/Tert Agency button.

20. Q: How do I know bids have been solicited from secondary or tertiary agencies?

A: The mandate's Assignment Status will have a value of "Pending Contract Agency Responses."

21. Q: How long do secondary and tertiary agencies have to submit a bid?

A: The invitation to submit a bid includes a response due date. The bidding process is automatically closed once the response date occurs, preventing any more bids from being submitted in Provider Assignment.

22. Q: How do I know a secondary or tertiary agency declined to bid?

A: The agency will not have entered a provider's name for the bid.

23. Q: How do I know secondary and tertiary agency bids should be reviewed and one awarded?

A: The mandate's Assignment Status will have a value of "Bidding Completed/Ready to Award."

24. Q: Do I have to award the bid to the agency recommended by the system?

A: No, but you will be required to input a reason why the recommended agency was not awarded the mandate.

25. Q: How do I know a mandate has been awarded to a secondary or tertiary contract agency?

A: The row in the grid will contain the agency's name, the name of the agency provider and the Assignment Status will be "Awaiting First Attend."

Manually Adding a Mandate

26. Q: How do I manually add a mandate to Provider Assignment?

A: Click the *Miscellaneous* link at the top of the Provider Assignment 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. Complete all of the mandate fields, including the *Reason for Manually Creating New Row* field, and 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."

Note: You may also add a new mandate by clicking the *Student NYCID* link in the service recommendation grid.

27. Q: When is it appropriate to manually add a mandate to Provider Assignment?

A: Add a new mandate when an authorized service recommendation on the most recent finalized IEP is not displayed in Provider Assignment or a new service recommendation must be provided to the student.

Deleting or Terminating a Mandate

28. Q: When can I delete a mandate in Provider Assignment?

A: A mandate must be located on an *Awaiting* sub-tab in order to delete it; and it must have an *Assignment Status* of "Awaiting DOE Provider", "Awaiting Contract Agency", "Awaiting RSA", or "Awaiting Authorization for Independent SETSS Teacher."

To delete the mandate, navigate to the *Awaiting* sub-tab where the student mandate resides and search for the student's service recommendation. Click the check box adjacent to the mandate and click **Delete Row**.

29. Q: When can I terminate a mandate?

A: You can terminate a mandate if a provider has already been assigned to the mandate.

To terminate the mandate, navigate to the sub-tab where the student mandate resides and search for the student's service recommendation. Click the check box adjacent to the mandate and click **Terminate**. In the *Terminate Provider* pop-up window that displays, select the reason code.

30. Q: Can I delete a mandate that has been split?

A: A mandate which has been split cannot be deleted if services have commenced on any of the partial mandates.

Provider First Attend

31. Q: Do I need to first attend after an annual review or reevaluation if the service mandate has not changed for the student?

A: *No.*

32. Q: I am a DOE provider. How do I record a first attend?

A: *DOE providers' first attend dates will be automatically populated from the earliest certified and saved Encounter Attendance service record. However, if the First Attend page and Placement page of the student's profile does not reflect the First Attend date, you can manually enter it on the First Attend page of the student's profile.*

33. Q: I am contract agency or independent provider. How do I record a first attend?

A: *You will select the mandate in Provider Assignment, click the First Attend button and input the date services were first provided.*