Department of Education

NCLB-SES Vendor Portal User Guide

Updated Mar 26, 2010

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1. Introduction

This document is a Vendor Portal Guide for NCLB-SES. The intended audience is SES Providers and their associates.

The current NCLB SES application contains a database of SES Schools and students eligible for the program. It helps the program office and the providers to manage data online. In addition, it provides a way for the program office to generate reports that measure student performance.

The system also interfaces with PETS (Personnel Eligibility Tracking System) to make sure that the staff members that directly interact with students, or have access to student information are cleared (with background check, etc). Before providing any service or accessing student information, provider staff must have security clearance in PETS.

The providers must also be technically adept at interacting with the Vendor Portal application, which captures, stores, and coordinates payment. The DOE provides technical support but not one-on-one consulting.

The providers begin their interaction with Vendor Portal by accepting the services (section 2.9). Once they have accepted the services (after verifying rates, hours, services, etc) then they can update their contact information (section 2.3) and then, start accepting enrollments for students (section 2.2) with those services.

The next step for the providers is to generate student education plans (SEPs) (section 2.4). As the program services progress, the providers can upload attendances. Intermittently, the system will prompt for progress reports (PRs) (section 2.8) to be filled out. SEPs and PRs are mandatory requirements.

While uploading attendances, the certification for attendance batches is a critical step for getting payments. The certification allowance windows depend upon whether the vendor subscribed for the e-commerce option with the NYC DOE or not. The e-commerce subscribers can certify validated attendance batches throughout the month. The providers who have not chosen to subscribe to the e-commerce option can certify their validated attendance only in the last week of the month. If a provider wishes to subscribe to e-commerce option, please contact the program office at nclbses@schools.nyc.gov.

The validated attendance data are subsequently shared with the State and Federal Audit teams.

A link to the application through the DOE's Vendor Portal will appear as marked in Figure 1's right side.

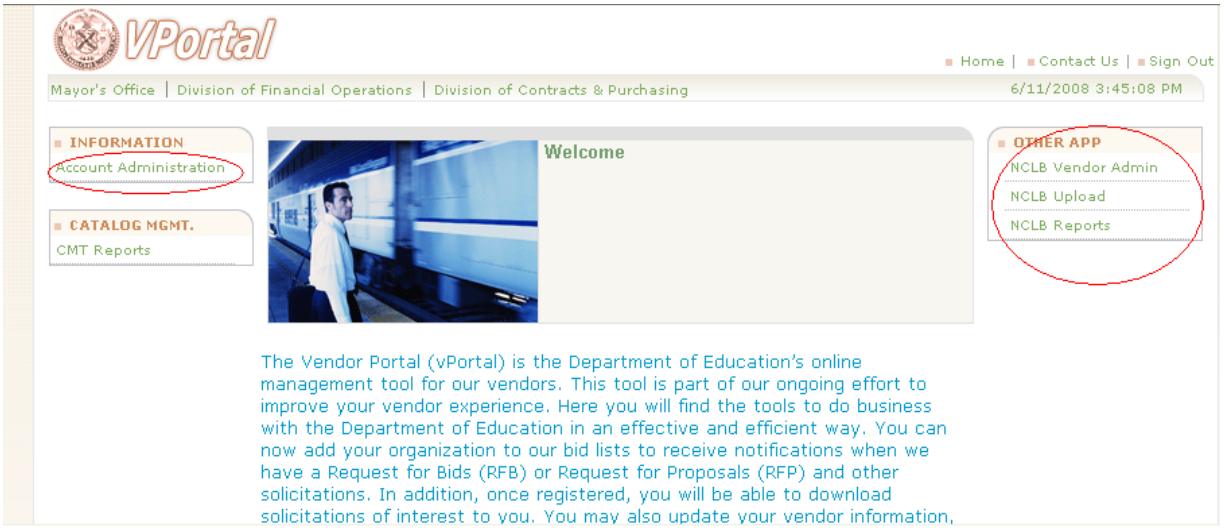


Figure 1: Vendor Portal Landing screen

If the link does not appear, please use the Contact Us link above to get help. This link is available for providers who are unable to log in the system as well.

The providers who have contracted with DOE for only SES see the following four options:

- NCLB Vendor Admin: This allows various administrative tasks for the Providers
- NCLB Upload: This allows the providers to upload their attendance data. This is particularly helpful for bulk upload of attendances with an intention to create invoices
- NCLB Reports: This allows the providers to run a report for creating an invoice template or getting uploaded attendance
- NCLB Online: This allows the vendors to submit piece-meal attendance

2. Vendor Administration

The user can access Vendor Portal website at following URL https://vendorportal.nycenet.edu/vendorportal/login.aspx on Microsoft Internet Explorer 6.x or newer browser

2.1. How to Register?

A user can view the instructions to register as a new user by clicking on "How to Register?" link as circled in red below:

Figure 2: Vendor Portal Login screen

2.2. How do I add or edit users and give them specific access?

The administrator role at the Provider's organization can create child accounts. The administrator can control the access level for the child accounts via Account Administration (shown in Figure 1 on the left side).

The administrator for a vendor can create "child accounts" to access the Vendor Portal via Account Administration. A "child account" is a way to give an employee a selective access to applications and/or functions within the application. In order for vendors to maintain privacy, it is important to create "child accounts" as these accounts limit the users' access.

Steps to create a child account and grant access to NCLB applications

- Select Account Administration (Figure 1's left side)
- Select add/edit users and a screen as shown below comes up showing a list of existing users

Figure 3: Add users tab screen

- Click on *Add Users* and a form as shown below comes up

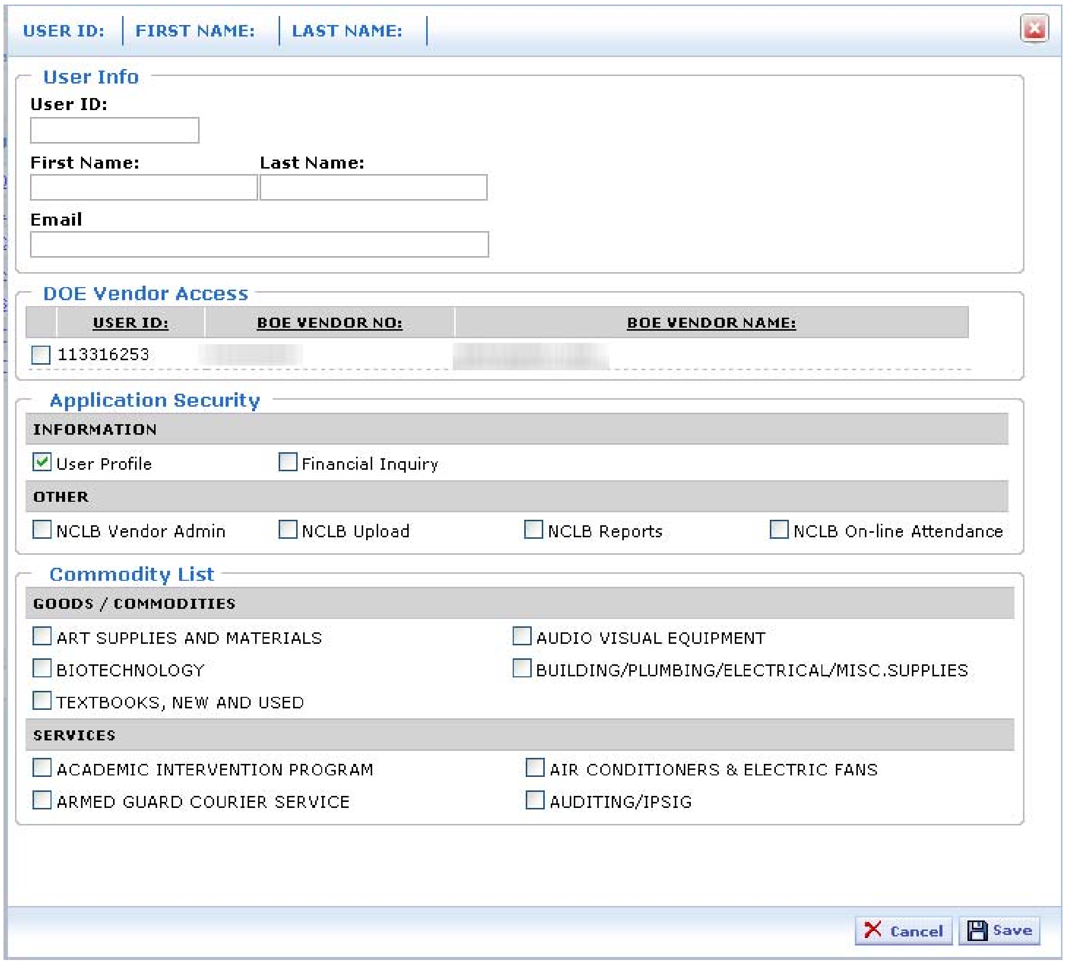


Figure 4: Add users form screen

- Enter information in the respective fields and select the access for the user from Application Security section's Information and Other sub-section
- After submitting the info, an email will be sent to the newly created user in the email provided on the form, informing the username and password for access to the Vendor Portal.
- Go to NCLB Vendor Admin

The provider's administrator can edit the access level by reaching the Add/Edit Users section and clicking on the User ID. They also have feature specific control in Access Management as explained in section 2.7.

2.3. Instructors

This link lists the teachers, tutors and other staff.

These individuals must be registered, approved and made active in PETS[1] prior to providing services to the students. The PETS involves three steps: inputting staff information, approval of staff and if the staff is approved, ensuring that the staff is "active" in the system on the accurate contract roster. It is the responsibility of the provider to switch non-working staff to "inactive". If teachers/tutors are improperly registered, they must not have contact with the school or students under any circumstances.

The roster can be downloaded on to an excel file by clicking on "Export" and clicking on "Save."

Figure 5: Instructors landing screen

2.4. Enrollments

Providers may approve or reject students enrolled by the Integrated Service Center staff. Once approved, the students must receive tutoring within 30 days. No wait listing of students is permitted. A provider purposely holding forms in the anticipation of a more significant enrollment is considered "wait-listing" -- this is not permitted. The providers who approve students and do not provide services within 30 days are subject to sanctions. The providers are supposed to approve students after ISC enrollment within 5 days; failure to do so would lead to the student being released to the eligible pool for a re-enrollment with another provider.

Click on "Approve Enrollment" to approve enrollments. The approval process can be completed for each student individually or for a group of students. Click on Accept for individual approval or Reject for individual rejection. For bulk approval/rejection, please check the box to the left of the corresponding OSIS number then click on the ACCEPT button.

"Enrollment" section has four tabs – reflecting all options

- Pending- This lists the students waiting for provider's approval or rejection. Contact information MUST be completed before accepting or rejecting students.

[1] PETS – Personnel Eligibility Track System

- Accepted – This lists the accepted students. However, after approving and prior to uploading attendance for the student, the provider has a 5-day grace period to reject a student.

- Rejected – This lists the rejected students. Likewise, you have a 5-day grace period to reverse a rejection (i.e. to approve) unless the student has already enrolled with another provider. The providers have a 30-day window to reject. While rejecting, including a reason is beneficial for the SES Program office to review the rejections.

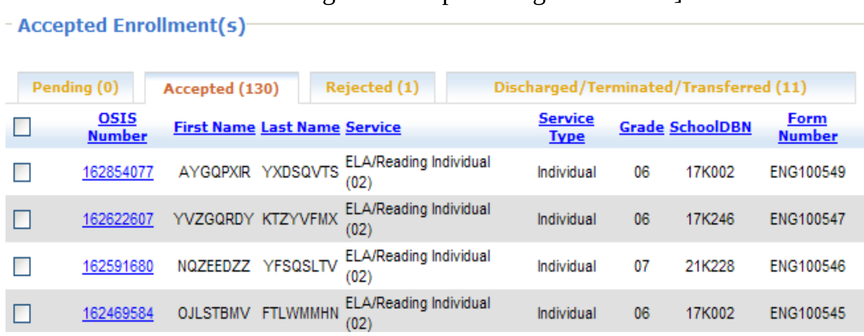
- Discharged/Terminated/Transferred- This lists students who are Discharged/Transferred. . Either of these may lead to the student being in this list.

    - A student may have been discharged in the NYC public school system.
    - Alternatively, the student may have been transferred from an eligible school to an ineligible school

All discharged /transferred students must be re-enrolled before providing the service. The providers must monitor this list continuously to know which students are eligible for service by the provider. The providers can contact the program office if they suspect that the student was unduly listed in this list.

[Note: If the student comes back after being discharged, the student needs to be re-enrolled before providing the service. The system will display an error if the provider tries to upload an attendance for the service after the date of discharge.

All providers must check if the student is discharged/transferred before providing the service. A student may be discharged at anytime and the student/parent may not notify you. The providers must always make sure the student is not discharged before providing the service.]



	OSIS Number	First Name	Last Name	Service	Service Type	Grade	SchoolDBN	Form Number
☐	162854077	AYGQPXIR	YXDSQVTS	ELA/Reading Individual (02)	Individual	06	17K002	ENG100549
☐	162622607	YVZGQRDY	KTZYVFMX	ELA/Reading Individual (02)	Individual	06	17K246	ENG100547
☐	162591680	NQZEEDZZ	YFSQSLTV	ELA/Reading Individual (02)	Individual	07	21K228	ENG100546
☐	162469584	OJLSTBMV	FTLWMMHN	ELA/Reading Individual (02)	Individual	06	17K002	ENG100545

Figure 6: Accepted Enrollments screen

2.5. Provider Contact Management

This section shows your contact information. The providers must update the contact information.

Please note that:

- All contact information must be entered before students can be accepted
- Without completing this form, the provider cannot certify the attendance batches.

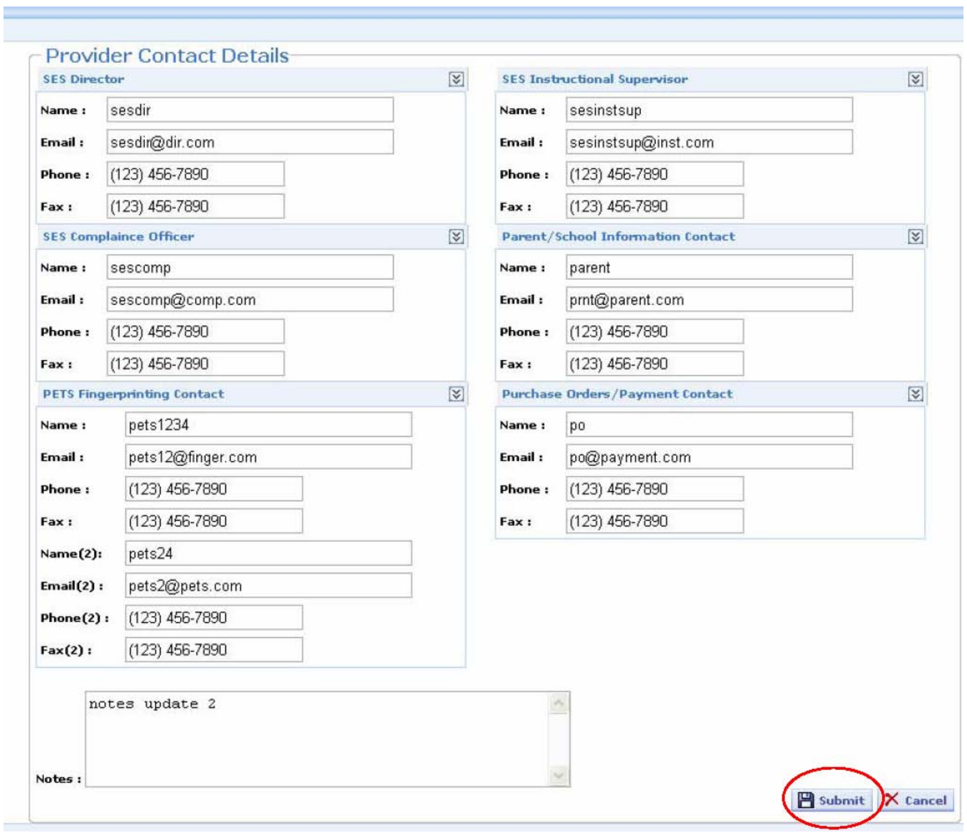
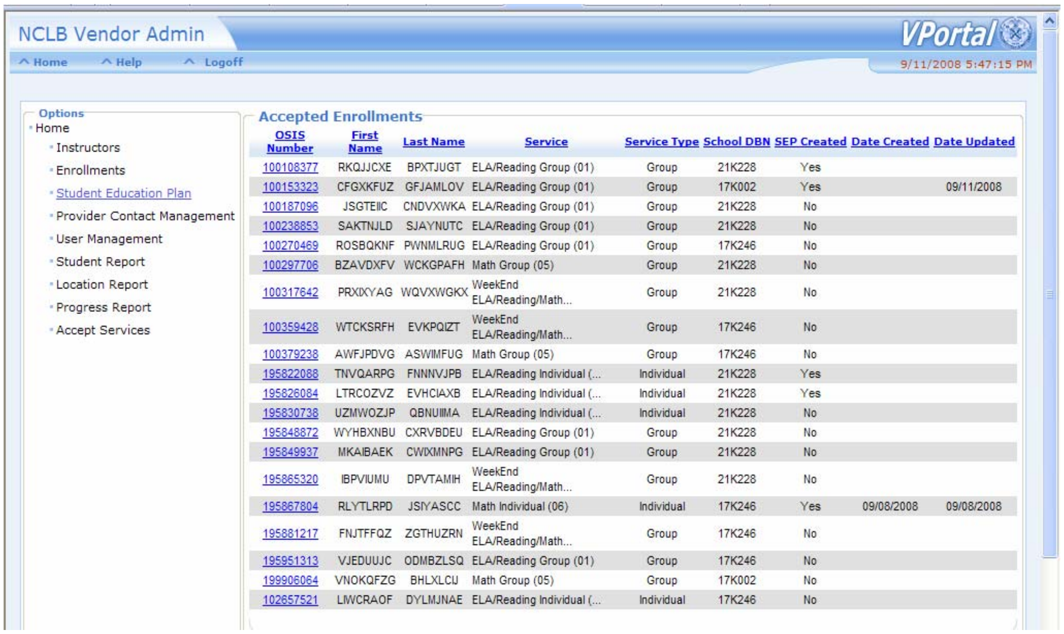


Figure 7: Provider Contact Details screen

2.6. Student Education Plan (SEP)

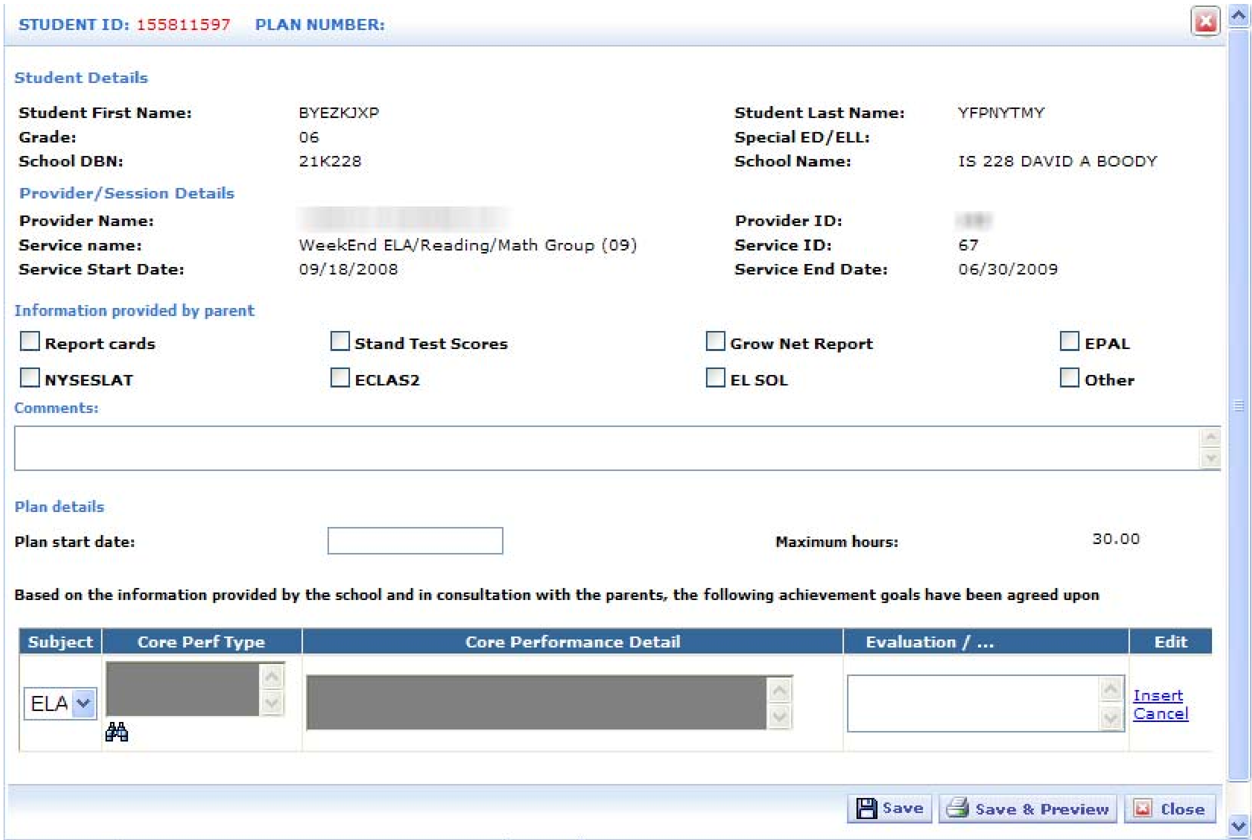


OSIS Number	First Name	Last Name	Service	Service Type	School DBN	SEP Created	Date Created	Date Updated
100108377	RKQJJCXE	BPXTJUGT	ELA/Reading Group (01)	Group	21K228	Yes		
100153323	CFGXKFUZ	GFJAMLOV	ELA/Reading Group (01)	Group	17K002	Yes		09/11/2008
100187096	JSGTEIIC	CNDVXWKA	ELA/Reading Group (01)	Group	21K228	No		
100238853	SAKTNJLD	SJAYNUTC	ELA/Reading Group (01)	Group	21K228	No		
100270469	ROSBQKNF	PWNMLRUG	ELA/Reading Group (01)	Group	17K246	No		
100297706	BZAVDXFV	WCKGPAFH	Math Group (05)	Group	21K228	No		
100317642	PRXIXYAG	WQVXWGKX	WeekEnd ELA/Reading/Math...	Group	21K228	No		
100359428	WTCKSRFH	EVKPQIZT	WeekEnd ELA/Reading/Math...	Group	17K246	No		
100379238	AWFJPDVG	ASWIMFUG	Math Group (05)	Group	17K246	No		
195822088	TNVQARPG	FNNNVJPB	ELA/Reading Individual (...	Individual	21K228	Yes		
195826084	LTRCOZVZ	EVHCIAXB	ELA/Reading Individual (...	Individual	21K228	Yes		
195830738	UZMWOZJP	QBNUIIMA	ELA/Reading Individual (...	Individual	21K228	No		
195848872	WYHBXNBU	CXRVBDEU	ELA/Reading Group (01)	Group	21K228	No		
195849937	MKAIBAEK	CWIXMNPG	ELA/Reading Group (01)	Group	21K228	No		
195865320	IBPVIUMU	DPVTAMIH	WeekEnd ELA/Reading/Math...	Group	21K228	No		
195867804	RLYTLRPD	JSIYASCC	Math Individual (06)	Individual	17K246	Yes	09/08/2008	09/08/2008
195881217	FNJTFFQZ	ZGTHUZRN	WeekEnd ELA/Reading/Math...	Group	17K246	No		
195951313	VJEDUUJC	ODMBZLSQ	ELA/Reading Group (01)	Group	17K246	No		
199906064	VNOKQFZG	BHLXLCIJ	Math Group (05)	Group	17K002	No		
102657521	LIWCRAOF	DYLMJNAE	ELA/Reading Individual (...	Individual	17K246	No		

Figure 8: Accepted Enrollments screen for filling out the SEPs

As shown in Figure 8, this section shows the student education plans for all accepted students. The provider must enter an SEP into the SES application for each student enrolled for the service, within the first several sessions (1-3)

- Steps to create an SEP for a student
  - Click on *Search by Student ID*
  - Enter the Student ID and hit return
  - Click on the student id/OSIS number for the SEP form to come up


STUDENT ID: 155811597 PLAN NUMBER:

Student Details

Student First Name: BYEZKJXP
Student Last Name: YFPNYTMY
Grade: 06
Special ED/ELL:
School DBN: 21K228
School Name: IS 228 DAVID A BOODY

Provider/Session Details

Provider Name: [redacted]
Provider ID: [redacted]
Service name: WeekEnd ELA/Reading/Math Group (09)
Service ID: 67
Service Start Date: 09/18/2008
Service End Date: 06/30/2009

Information provided by parent

Report cards
Stand Test Scores
Grow Net Report
EPAL
NYSESLAT
ECLAS2
EL SOL
Other

Comments:

Plan details

Plan start date:
Maximum hours: 30.00

Based on the information provided by the school and in consultation with the parents, the following achievement goals have been agreed upon

Subject	Core Perf Type	Core Performance Detail	Evaluation / ...	Edit
ELA				Insert Cancel

Save | Save & Preview | Close

Figure 9: Student Detail screen

On the SEP form,

- Enter the Plan Date
- Select ELA or Math (this selection is only available when the student is enrolled in a dual program, otherwise it will only show ELA or Math.
- Click on to search core performance type and detail; the user can choose the Grade Level at the top of the form as shown in Figure 9
- Select a type and the selected value will be transferred to the SEP screen. Only one goal can be selected at a time
- Enter the way of progress measurement in the “Evaluation “box on the SEP screen and click on insert to add the achievement goal. (This should match with your application submission to SED. Click add if adding another goal, then begin process again from Step iii
- Click on “Save and Preview” to save and print the plan

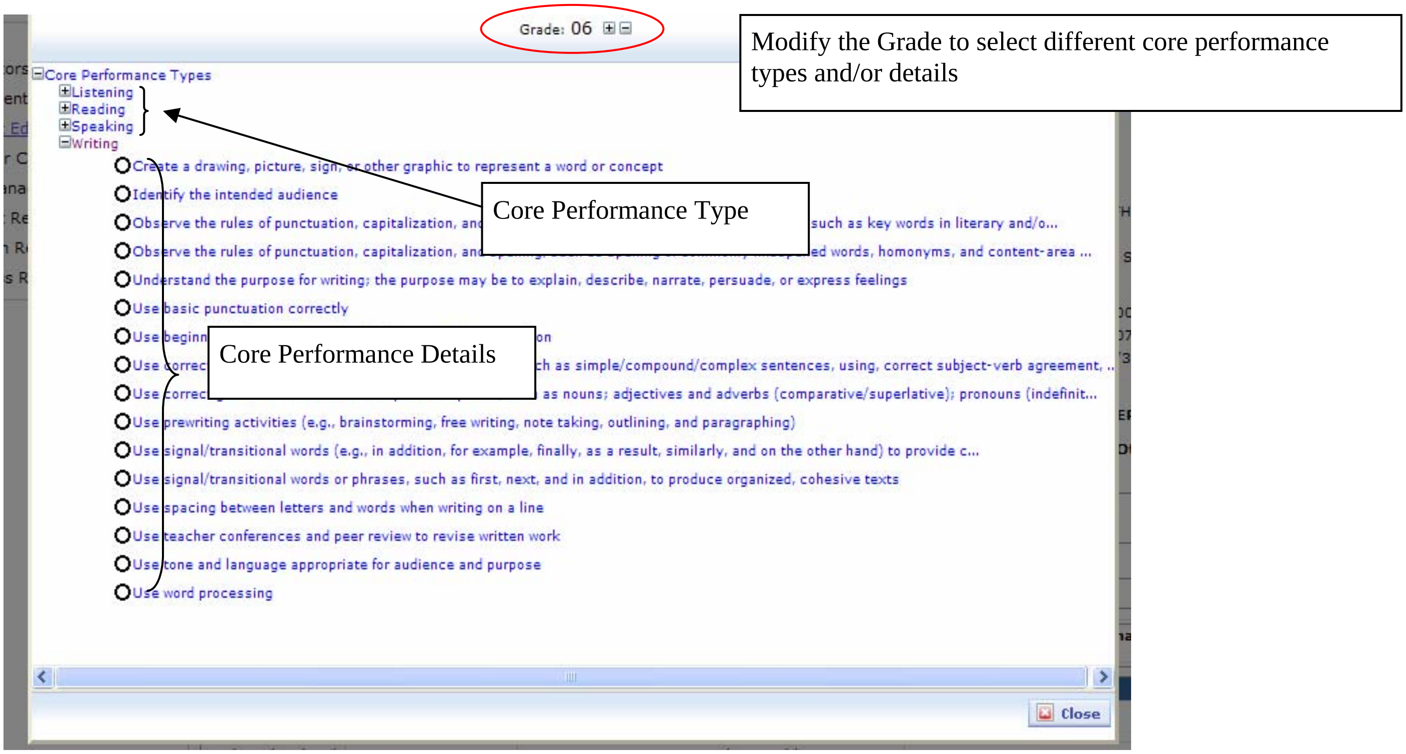


Figure 10: Core Performance Types screen

Once the user selects the core performance details from the above form, the SEP form is auto-populated as shown in Figure 11.

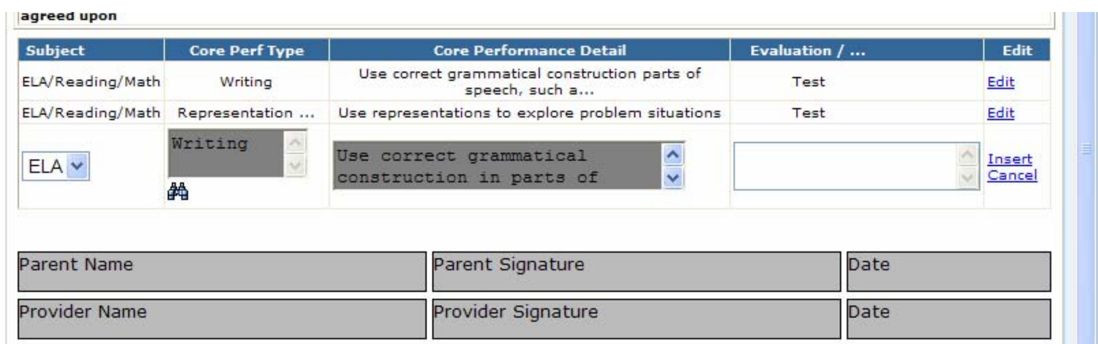
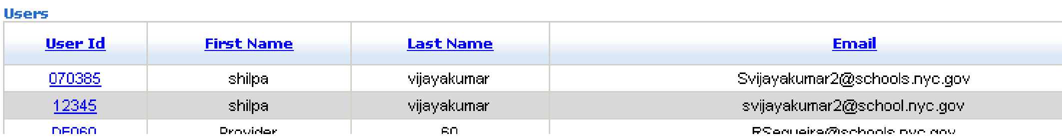


Figure 11: SEP form screen in Print mode

2.7. Feature Specific Access Management

This section allows customizing application access to individual users. The provider's administrator user can select access to variety of applications as well as features within the application for the users associated to the vendor.

After clicking on 'User Management' link, the following screen is displayed:


Users

User Id	First Name	Last Name	Email
070385	shilpa	vijayakumar	Svijayakumar2@schools.nyc.gov
12345	shilpa	vijayakumar	svijayakumar2@school.nyc.gov

Figure 12: User Management screen

Click in the User Id, results in screen as shown in Figure 13

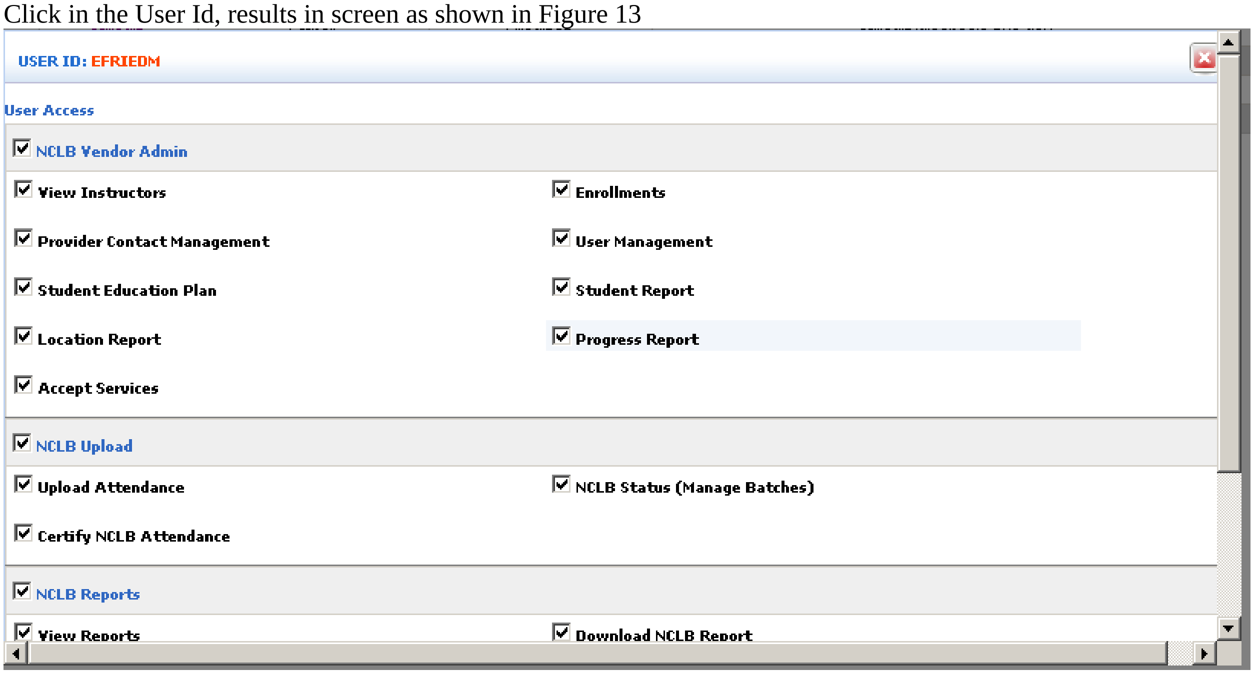


Figure 13: User Management screen

Click on 'Save' after filling out the form to save your selections.

2.8. Student Report

This report will generate a list of students with additional information that is very beneficial, such as contact information or whether the student is an English Language Learner. The results can be exported to a spreadsheet.

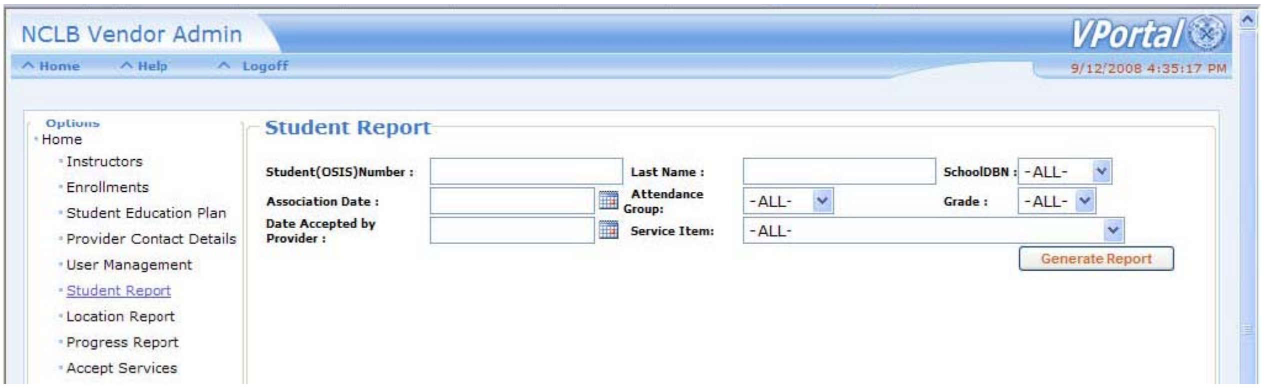


Figure 14: Student Report screen

2.9. Location Report

This report shows locations used by a provider based on the attendance uploaded. The primary selection is either "DOE Location" or "Non DOE Location". The report will directly open in a spreadsheet.

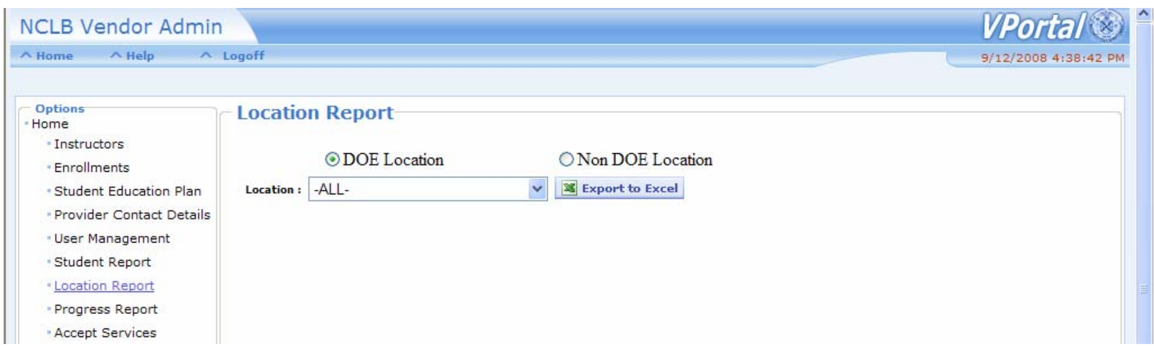


Figure 15: Location Report screen

2.10. Progress Reports

The Progress Report section lists the progress reports generated in the system and yet to be filled out. Each student will have four progress reports at approximately 25%, 50%, 75% or 100% of service hours. The academic goals articulated on the Student Education Plan (SEP) for the student will appear on the report and a comment will be required to track the progress of achieving prescribed goals.

When is progress reports generated?

To illustrate the logic for PR generation, let us consider a hypothetical situation of a student enrolled with a service provider for a service that requires 40 hours of total service.

The first PR is generated when the uploaded attendance reaches (1/4th) of Total Service hrs-3 hrs. When the student attendance is uploaded upto 7 hrs (total hrs/4 - 3), the Progress Report link will is generated on 7th hr of valid uploaded attendance.

How long can a provider get away without filling a Progress Report?

The user can continue to upload attendance without filling out the first PR only upto (1/4th) of Total service provider hrs +3 hrs. In case of our example, the user can do so up until 13th hour. The user can upload the attendance for the 14th hr only after filling out the first Progress Report. All PRs are mandatory as per the SES Program's requirement. Hence, there is no getting away without every PR for the student.

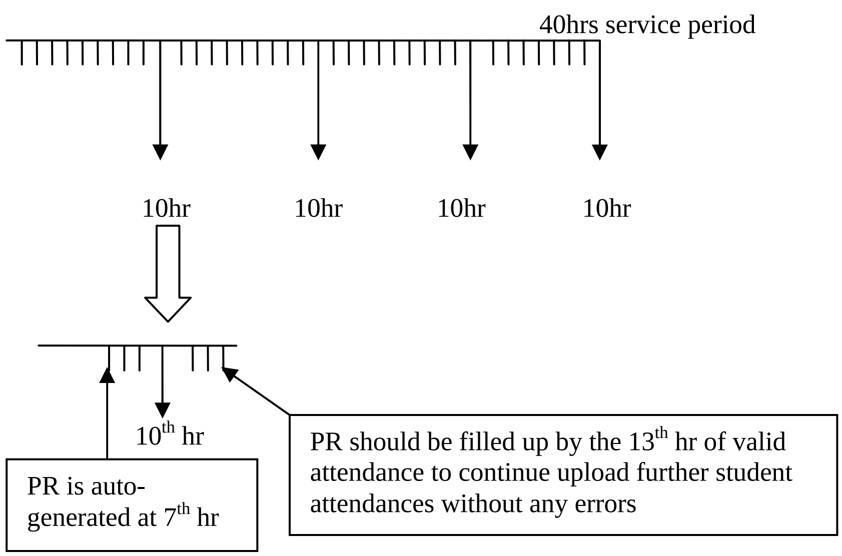


Figure 16: Progress Report List screen

How to fill out a Progress Report?

Step1: Locate the Progress Report in the Pending Reports tab shown in Figure 15. Click on the Student ID (OSIS) number and the form shown in Figure 17 will open:


STUDENT ID: PROGRESS REPORT NUMBER: 1

Student Details

Student First Name: Student Last Name:
Grade: Special ED/ELL:
School DBN: School Name:

Provider/Session Details

Provider Name: Provider ID:
Service name: ELA/Reading Individual (02) Service ID:
Service Start Date: 08/18/2008 Service End Date: 06/30/2009

Attendance Max Hrs of Service: 40.00 Hours to Date: 40

Service Date	Start Time	End Time	Minutes	Hours
09/01/2008	4:00 PM	7:00 PM	180	3.000000
09/02/2008	4:00 PM	7:00 PM	180	3.000000
09/03/2008	4:00 PM	7:00 PM	180	3.000000
			Total Hours:	9.000000

Academic Progress

Subject	Core Perf Type	Core Performance Detail	Evaluation / ...	Progress Indicator
ELA/Reading	Writing	Identify the intended audience	tools	-Select-

Save Save & Preview Close

Figure 17: Student Details screen

Step2: Specify the progress indicator for each goal by selecting from the drop down list. This list will only include the goals as prescribed in the Student Education Plan (SEP). Additional goals cannot be added in SEPs when creating progress reports.

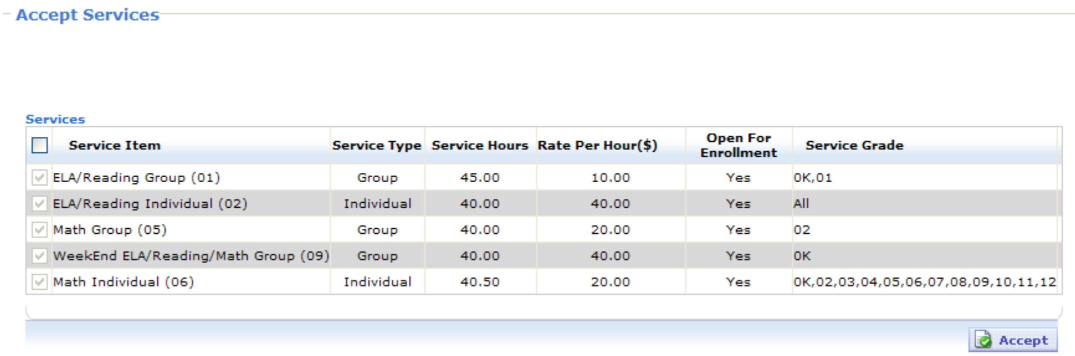
Step3: Print (save and print) the form. When you print the form, the progress report will automatically move to the right tab (fist, second third or fourth).

Please note: Despite filling out this information on-line you are still required to send in a signed, scanned version of the progress report to the program office at 65 Court Street, room 1002.

2.11. Accept Services

A provider must accept services prior to accepting the enrolled students. If a discrepancy is discovered or a correction needs to be requested (for amended contracts) then a request must be made to the Program office (nclbses@schools.nyc.gov) to resolve the issue.

Select the checkbox for the service and click the accept button if the details regarding the service are accurate.



Service Item	Service Type	Service Hours	Rate Per Hour($)	Open For Enrollment	Service Grade
ELA/Reading Group (01)	Group	45.00	10.00	Yes	0K,01
ELA/Reading Individual (02)	Individual	40.00	40.00	Yes	All
Math Group (05)	Group	40.00	20.00	Yes	02
WeekEnd ELA/Reading/Math Group (09)	Group	40.00	40.00	Yes	0K
Math Individual (06)	Individual	40.50	20.00	Yes	0K,02,03,04,05,06,07,08,09,10,11,12

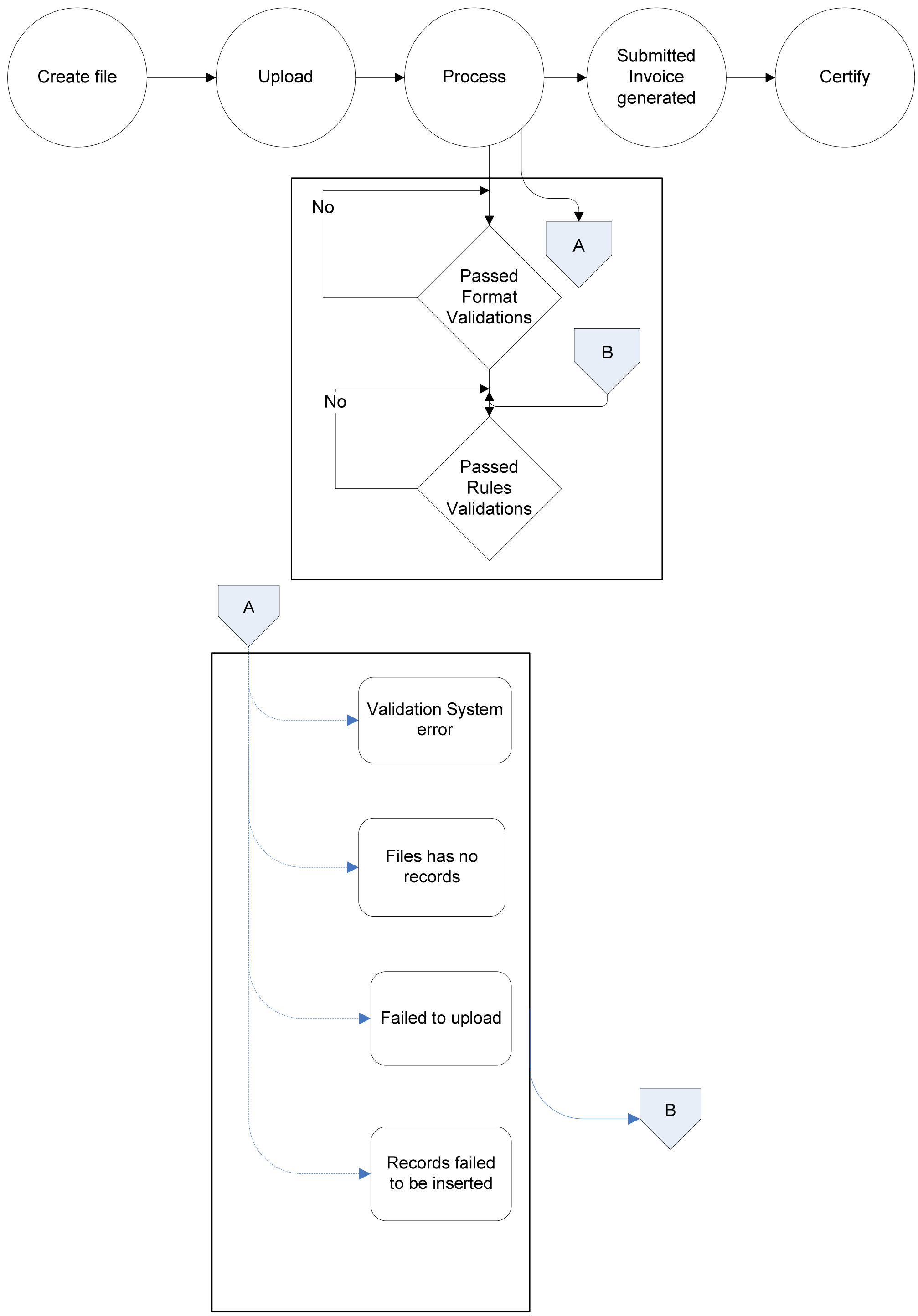
Figure 18: Accept Services screen

3. NCLB Attendance Upload and Invoicing process

SES Reports permits users to extract information as well as create an invoice template file.

3.1. Overview

The following diagram explains the Attendance Batch States



3.2. Create Invoice

To create a new report, the user must select a parameter and/or filter the parameters to extract the data. The user can select “Create Invoice” to generate a report. Please select the “Fiscal year” from drop down choices along with the” Invoice month”. Service Type and Student id are optional. Click on Generate Invoice to extract the report. The information appears in the body of the screen.

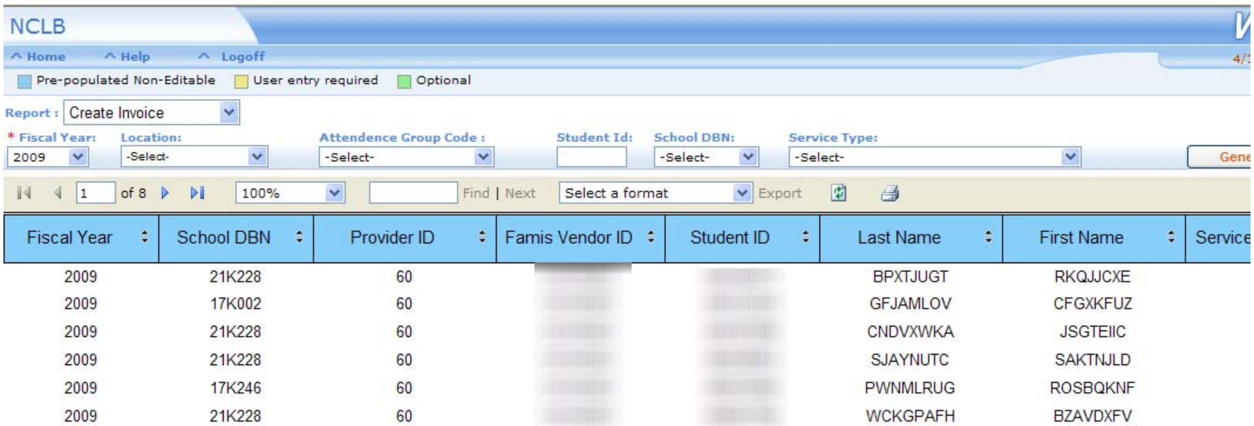


Figure 19: NCLB Report screen

3.3. Extract Report

To download and save a copy on your computer, use the select format dropdown to choose a format (Excel) and the click” Export” as shown in Figure 20.

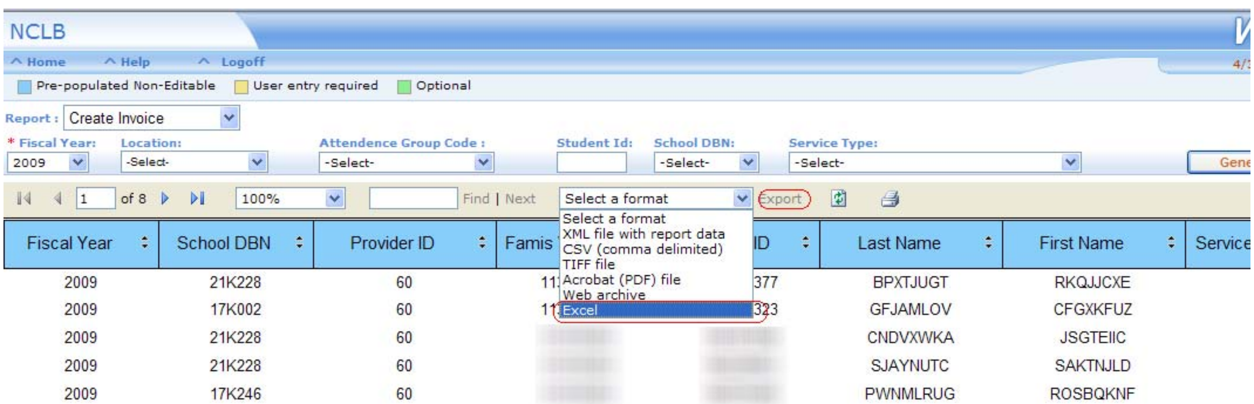


Figure 20: NCLB Report screen

The user must extract a new report every time to have the most updated data fields. This helps maintain the currency of the report.

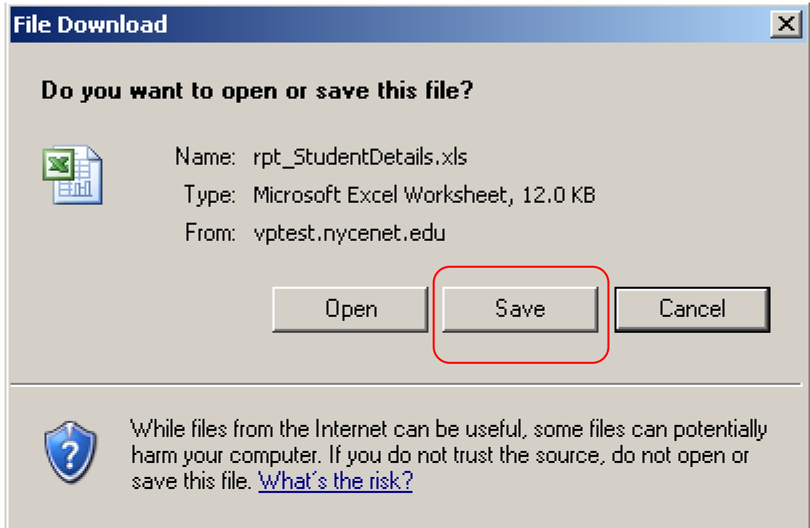


Figure 20: File Download screen for Invoice creation template

Click on Save Excel file on your computer as shown in Figure 20.

3.4. Edit Report and Save the file as a tab delimited file

Check the header column and use the following list as a legend while editing the exported Excel:

Pre-populated and should not be editable
User entry required
Optional
Columns with blue headers are Pre-populated and Non- editable
Entry is required for the columns with yellow headers
Columns with Green headers are optional

Enter the attendance details in the file.

Please note that while extracting a report, the following columns must be formatted in specific way:

- Service date needs to be in the MM/DD/YYYY format. For instance, 11/01/2009
- Start and end time must be formatted as *HH*:*MM* AM/PM. For instance, 11:30 AM

Please refer to Appendix B for tips about other fields.

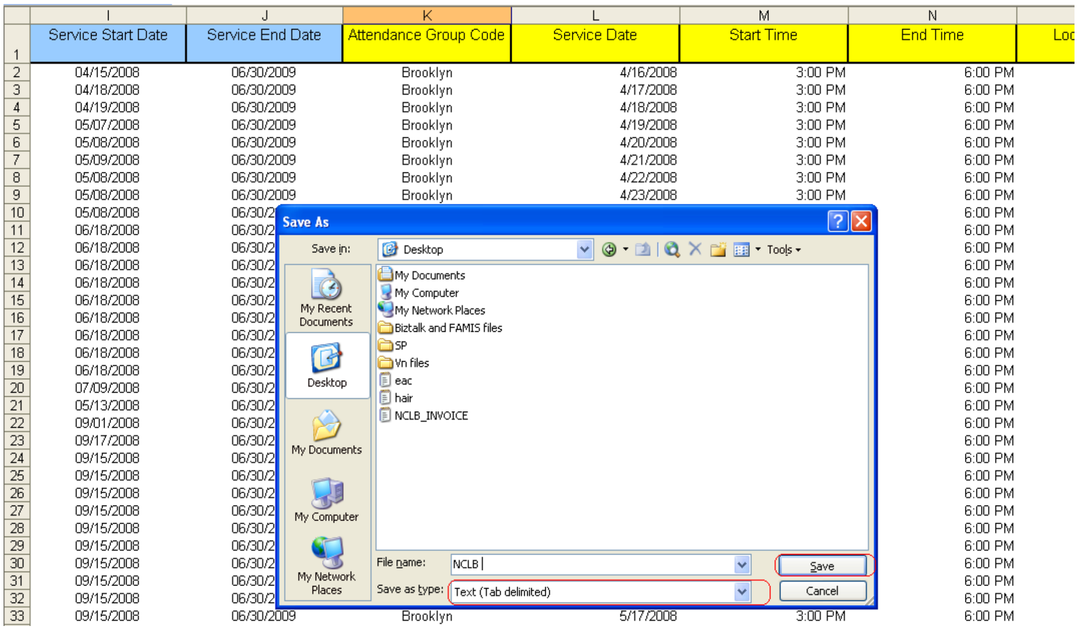


Figure 21: Excel Save As screen for Invoice creation template

As shown in Figure 21, at the bottom of the window, go to the drop down menu labeled "Save as Type". Scroll down, until you see "Text (Tab delimited) (*.txt)". Select this option and click “Save”.

3.5. Upload the Invoice

The NCLB Upload link allows vendors and/or authorized users to upload SES file for invoicing. Only tab-delimited (*.txt) files are allowed to be uploaded through the system. Click on “Browse.” Select file and click on “Upload File.”

Once uploaded, the user can check the status by clicking on “Status Page”. The “Status” field shows the uploaded file status. There are various column headers as follows:

- TOTAL- Total count of records for the uploaded batch (attendance file)
- ERROR- Provides the count of records that failed validation for the uploaded batch (attendance file)
- PASS- Provides the count of records that passed validations
- STATUS - The file status can be any of the following

- New
- File Saved. Please Wait...
- Passed Format Validation
- Failed Format Validation
- Processing
- Records Failed to be Inserted

- Passed Rules Validation
- Failed Rules Validation
- Submitted
- Uploaded to Mainframe
- Attend Code Required
- Deleted Batch
- File has no records

To know more about the status, please refer Appendix A. To avoid validation errors, please refer Appendix B.

3.6. Submit the Batch

After the batch passes through all validation rules, the batch can be submitted for creating an invoice. Click on to submit the batch.

3.7. Delete Batch

Click on to delete the batch if you do not want the attendance batch to be processed ahead

Note: Delete icon does not appear if progress reports are associated with the batch. Progress reports have to be deleted from our end for you to delete the batch.

3.8. Certify Batch

Certify the invoice by clicking on the certification icon ( ).

3.9. Edit an Attendance Record with errors

The record status page displays an attendance record's relevant information. The user can see errors associated with each record. The user also deletes each record.

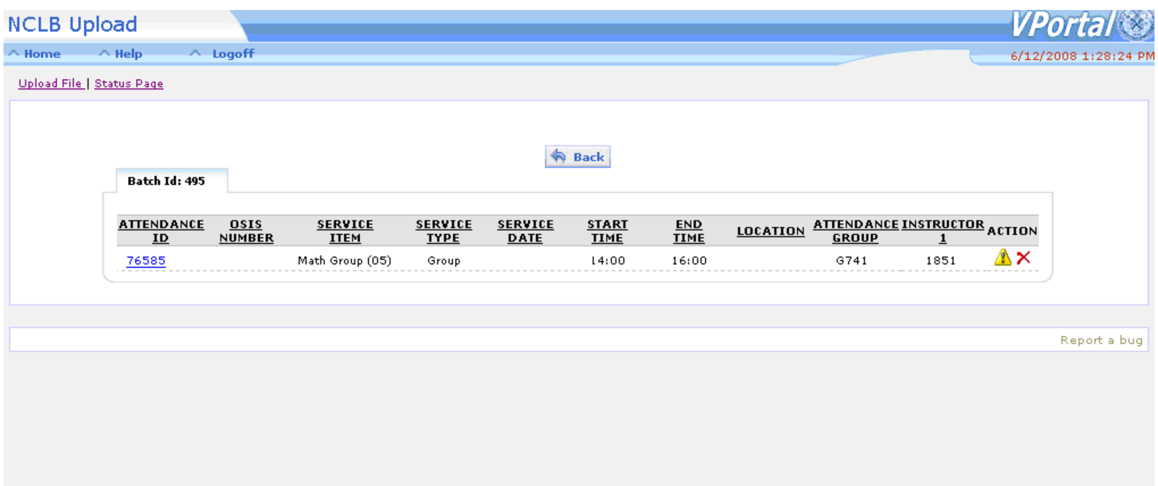


Figure 22: Attendance Record Status screen

A mouse over on the icon ( ) shows the error messages regarding that record. To edit, the user must click on the "Attendance ID" on the first column (left) to open the record details, in which an edit can be performed.

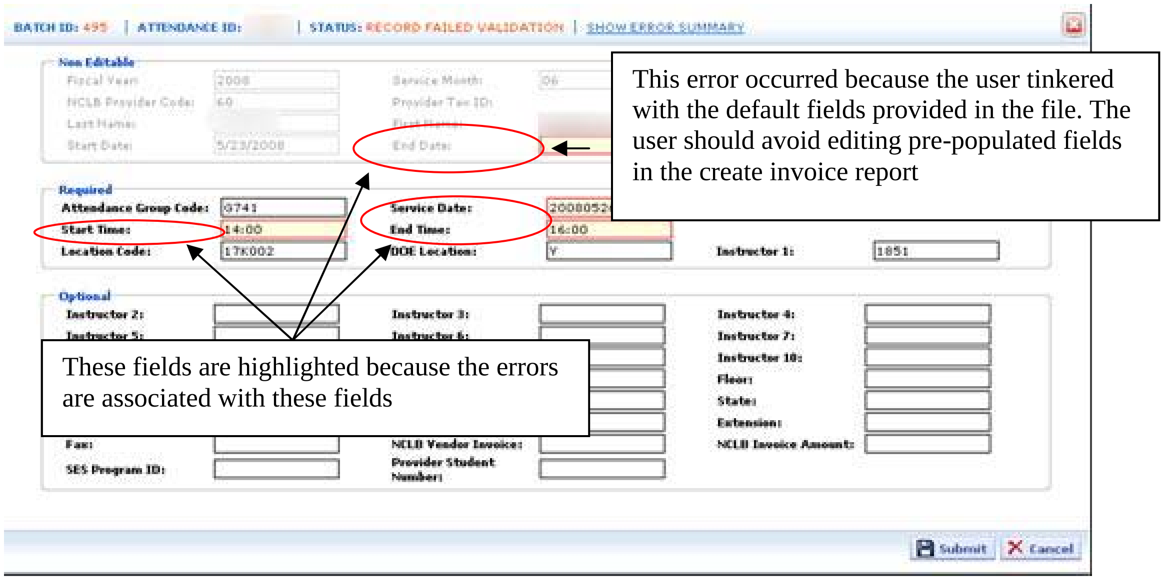


Figure 23: Edit Record screen

When an error occurs on the non-changeable fields, the only option is to delete the record.

After correcting errors for the required and optional fields, the record can be submitted again for validation by clicking the Submit button at the right bottom of the record form.

When a corrected record passes the validation, the user sees the next record that contains errors. Only when a batch is error free, the option to submit the batch becomes available.

Appendix A – Status Messages Explained

Status	Description	Reason	Action to be taken
New	File is uploaded for the first time	NA	None
File Saved. Please Wait...	File has been uploaded and has been sent for validation	NA	None
Passed Format Validation	The file is in the right format	NA	None
Failed Format Validation	Incorrect file format	The file is not in tab-delimitated (.*txt) format or the data in the file is not in the right format.	Upload correct file format
Processing...	The system is still processing the request	NA	None
Passed Rules Validation	The file is in the right format and has passed rules validation	NA	Submit the file for invoicing. Click on the submit icon to submit the file. Once the batch is submitted, a new invoice number is generated.
Failed Rules Validation	The file is in the right format but did not pass rules validation	Wrong data	Click on the error icon and check if all the data entered is correct and is in the right format. Rectify the errors.
Uploaded to Mainframe	Invoice number is generated and the file has been sent for approval	NA	None
Deleted Batch	Batch has been deleted	Error Batch	Upload a new file
File has no records	No data in the file	Mandatory fields are empty	Enter data

Appendix B - Tips for data entry for attendance batches

Fieldname	**Value**	**Description**	**Example**	**Validation**
FISCAL YR		Auto Populated. Please do not modify columns with blue header		
SchoolDBN		Auto Populated. Please do not modify columns with blue header		
NCLB PROVIDER CODE		Auto Populated. Please do not modify columns with blue header		
PROVIDER (TAX ID)		Auto Populated. Please do not modify columns with blue header		
OSIS ID		Auto Populated. Please do not modify columns with blue header		

Fieldname	**Value**	**Description**	**Example**	**Validation**
LAST NAME		Auto Populated. Please do not modify columns with blue header		
FIRST NAME		Auto Populated. Please do not modify columns with blue header		
NCLB SERVICE CODE		Auto Populated. Please do not modify columns with blue header		
START DT		Auto Populated. Please do not modify columns with blue header		
END DT		Auto Populated. Please do not modify columns with blue header		
ATTENDANCE GROUP CODE	Pre populated after first input.	Unique group code provider by the vendor. This will be helpful while uploading attendance for all students in a group.	BronxELAgroup	
SERVICE DATE	Required field	The date the student was provided service.	4/12/2009	Service date must be between Service Start Date and End date
START TIME		Start Time	6:00 PM	1. Should be valid time format HH:MM AM/PM. 2. Session length must be less than or equal to 180 minutes (3hrs)

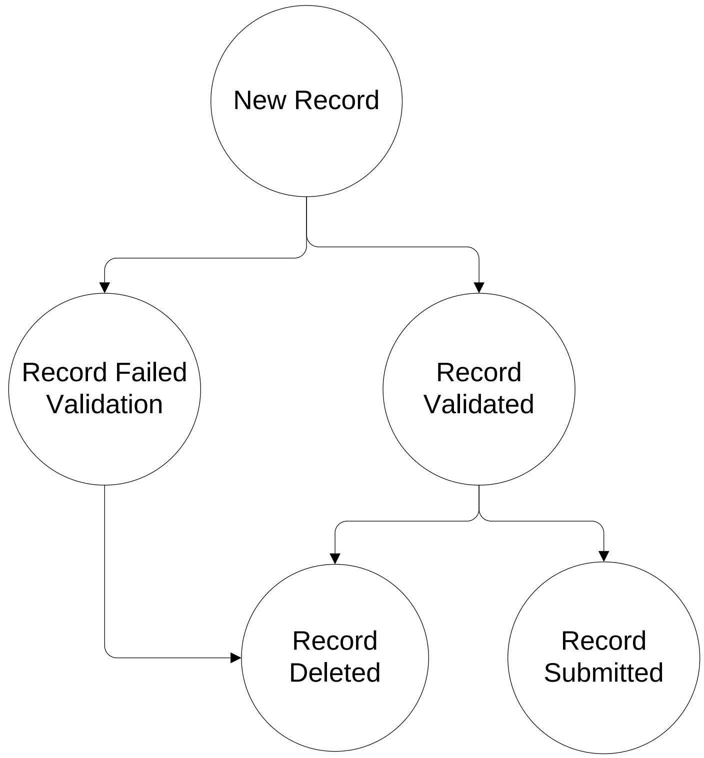
Fieldname	Value	Description	Example	Validation
END TIME		Service End Time	9:00 PM	1. Should be valid time format HH:MM AM/PM. 2. Session length must be less than or equal to 180 minutes (3hrs)
LOCATION CODE	Pre populated after first input	Location of service		1. Location code must be the School DBN if the service is provided at DOE location. DOE location will be ‘Y’. 2. Providers can enter their location code if the student is services at their location. Enter DOE location as ‘N’. Location details such as Floor, room #, city, state, zip code and fax numbers becomes mandatory. 3. Location code will be “HOME” if the student is tutored at home. 4. Location code will be “ONLINE” if the student is tutored online.
DOE LOCATION	Pre populated after first input	INDICATOR IF SERVICE PROVIDED AT SCHOOL OR OTHER LOCATION	Y / N	DOE location = ‘Y’ if the student is tutored at DOE location. DOE location = ‘N’ if services are not being provided in a public school.
INSTRUCTOR 1	Pre populated after first input (PETS id number)	Refer Section 2.3 for knowing PETS ID	12345	Instructor must be eligible on the service date

Fieldname	Value	Description	Example	Validation
INSTRUCTOR 2	Optional field	Refer Section 2.3 for knowing PETS ID	12345	Is instructor eligible on service date Information entered with PETS ID number
INSTRUCTOR 3	Optional field	Refer Section 2.3 for knowing PETS ID	12345	Is instructor eligible on service date Information entered with PETS ID number
INSTRUCTOR 4	Optional field	Refer Section 2.3 for knowing PETS ID	12345	Is instructor eligible on service date Information entered with PETS ID number
INSTRUCTOR 5	Optional field	Refer Section 2.3 for knowing PETS ID	12345	Is instructor eligible on service date Information entered with PETS ID number
INSTRUCTOR 6	Optional field	Refer Section 2.3 for knowing PETS ID	12345	Is instructor eligible on service date Information entered with PETS ID number
INSTRUCTOR 7	Optional field	Refer Section 2.3 for knowing PETS ID	12345	Is instructor eligible on service date Information entered with PETS ID number
INSTRUCTOR 8	Optional field	Refer Section 2.3 for knowing PETS ID	12345	Is instructor eligible on service date Information entered with PETS ID number
INSTRUCTOR 9	Optional field	Refer Section 2.3 for knowing PETS ID	12345	Is instructor eligible on service date Information entered with PETS ID number
INSTRUCTOR 10	Optional field	Refer Section 2.3 for knowing PETS ID	12345	Is instructor eligible on service date Information entered with PETS ID number
LOCATION NAME	Pre populated after first input	Location Name	Bronx	Required field only if DOE location =N and not home

Fieldname	**Value**	**Description**	**Example**	**Validation**
ADDRESS	Pre populated after first input	Address	66 Camden street	Required field only if DOE location =N and not home
FLOOR	Pre populated after first input	Floor	7th floor	Required field only if DOE location =N and not home
ROOM NUMBER	Pre populated after first input	Room Number	1201	Required field only if DOE location =N and not home
CITY	Pre populated after first input	City	Bronx	Required field only if DOE location =N and not home
STATE	Pre populated after first input	State	NY	Required field only if DOE location =N and not home
ZIPCODE	Pre populated after first input	Zip Code	11201	Required field only if DOE location =N and not home
PHONE NUMBER	Pre populated after first input	Phone Number	212-212-2121	Required field only if DOE location =N and not home
EXTENSION	Pre populated after first input			Required field only if DOE location =N and not home
FAX	Pre populated after first input			Required field only if DOE location =N and not home
NCLB VENDOR INVOICE	Free for vendor use. Optional field			
NCLB INVOICE AMT	Free for vendor use. Optional field			

Fieldname	**Value**	**Description**	**Example**	**Validation**
NCLB SES PROG ID	Free for vendor use. Optional field			
PROVIDER STUDENT NUMBER	Free for vendor use. Optional field			

Appendix C - Attendance Record Status



Appendix D - Attendance Batch Error Remedy table

Attendance Batch Error	Remedy
Invoice held for an adjustment	Contact Program Director to seek clarification
The uploaded file could not be parsed. Please make sure that the file was saved in the appropriate format.	Do not alter the pre-populated data in the file. Remove all special characters in the file and save the file in Text (Tab Delimited) format.
The uploaded file could not be parsed. The number of columns in the file is not valid. Please note that column addition/deletion from the Excel spreadsheet is not supported.	Re-upload the file with corrections.
Unable to save the file to SQL. There are 3 possible causes :< br>1) The text file has been modified after it was exported from Excel. This is not supported. 2) One or more columns in the flat-file may have more number of characters than Column's size of SQL Server Database. This is not supported. 3) SQL Server may be experiencing some problems. Please try again later.	Server timed out. Try uploading file again later
An unknown error has occurred while validating the incoming file. Please report this error.	Refresh the page or report to SES Tech Team
Unable to upload to the Mainframe. It seems that the batch does not contain any Provider Service Id.	Re-upload the file with valid attendance and send mail to SES Tech Team
Unable to upload to the Mainframe. It seems that the invoice has zero payment.	Send mail to SES Tech Team
Unable to upload to the Mainframe. An error occurred while uploading the file. Please try again later.	Send mail to SES Tech Team for confirmation.
Unable to upload to the Mainframe. An unexpected error occurred while creating the invoice. Please report this error.	Send mail to SES Tech Team for confirmation.
File contains more than 3,000 records.	Do not upload files more than 3,000 records including headers. Split the records into two files and upload them separately.
One or more attendances in the uploaded batch have incorrect provider id. Please correct and re-upload.	Delete previous batch file and upload new file with correct content
Unable to upload to the Mainframe. The PO number is not available for this invoice.	Contact SES Tech Team and Program Office. Program Office will issue the accurate PO number and SES Tech Team can map new PO to existing certified invoice that failed due to the described issue.

Appendix E - Frequently Asked Questions (FAQs)

1. **I am unable to login to Vendor Portal.**
   Login using your Tax id/User Id and password.
   Make sure you are using the right link
   http://vendorportal.nycenet.edu/vendorportal/login.aspx
   Contact Vendor hotline if you are still unable to login
   Vendor Hotline email: vendorhotline@schools.nyc.gov
   Vendor Hotline contact: 718-935-2300

2. **I am the master account user. Why am I unable to see NCLB links on Vendor Portal?**
   Contact Vendor Hotline @ 718-935-2300 or contact Division of Contracts and Procurement. You may not have been activated for NCLB by them.

3. **How can I create a child account and grant access for Vendor Portal to my employee?**
   Refer to Section 2

4. **I am a child user. Why am I unable to see any links?**
   Contact the administrator (every provider has one) to grant you access to the links

5. **I am trying to accept a student and system does not allow me. I receive a message saying, "Service that student is enrolled in, is not accepted by provider yet."**
   Check if you have accepted the services under your profile.
   Also, check if you have filled out the provider's contact information.

6. **I do not see any of my locations listed.**
   Locations are in the system after the first upload. Please refer to the manual. Table 2 in the manual has more details about the same.

7. **I did the progress report two hours ago. However, the system says that a progress report is required.**
   Go to check your batch upload's status page. Check if there are any errors. Check the record mentioned for the errors. Finally, resubmit the specific record.

8. **Is there a way to research students that have not been approved for our school for services?**
   No

9. **I get an error "Your previous batch is being processed. Please upload new file after processing is completed" when I try to upload a file.**
   Only one file can be uploaded at a time. Please go to status, check if the file is processed, and upload another file.

10. **Can I upload huge files?**
    We recommend breaking down large files to multiple files with about 500-1000 records each.

11. **I am unable to delete the batch and I get an error "Progress reports exist for this batch". How can I delete it?**
    The system will not allow you to delete the attendance if progress reports are associated with the batch.

12. **What is the difference between DOE Location and Location code?**
    If you are tutoring the student at a DOE location, enter DOE location as "Y" and the location code will be the SchoolDBN. If you are tutoring the student at a Non-DOE location, enter DOE location as "N" and the location code will be your Location code (Home/Online/Library/etc).

13. **What is my location code?**

If you are tutoring the student at a DOE location, enter DOE location as “Y” and the location code will be your SchoolDBN.
If you are tutoring the student at a Non-DOE location, enter DOE location as “N” and the location code will be your Location code (Home/Online/Library/etc).

14. I do not see a certify icon.
There can be several reasons:
- The program office may have shut down your ability to certify. Contact them on nclbses@schools.nyc.gov
- Non- ecommerce vendors are allowed to certify only on the last seven calendar days of every month. Hence, if the vendor in question has not subscribed to e-commerce option, then the certification will not be allowed.

15. Whom should I contact for errors in the application?
Contact NCLB support at NCLB-SES@schools.nyc.gov. However, this mailbox does not support questions related to Program Office, PETS, or Student Information System (that drives the discharges/transfers of the student)

16. What is the difference between online attendance and upload?
Online attendance is for providers who have few students. It is easier to upload using “NCLB Upload” if you have many students.

17. I am unable to upload attendance for the student. The service end date for the student has been changed while downloading a report
The student might have been discharged or transferred. Please check in vendor admin – enrollments section to check if the student is discharged. If the student is discharged, the student must be re-enrolled before providing the service.

18. I am having PETS errors on Vendor Portal
Log in to PETS and research the Eligibility start date and Eligibility end date for the instructors you are trying to upload attendance for that specific contract. If you want dates modified for the instructors, contact PETS. If you have prior NCLB contracts to be considered for validations on Vendor Portal, make a request to Program Office at nclbses@schools.nyc.gov.

19. I submitted and certified an invoice for $X and received an amount lesser than that.
There may be an adjustment for the invoice by the Program Director. The reasons for adjustments are visible on the header part of the invoice. Click on the invoice number in Vendor Portal and you will see the comments from Program Director indicating the reason for the Adjustment.

20. Do’s and Don’ts while uploading a file

Do’s
- Read the manual before if you are uploading attendance for the first time.
- Download reports using “NCLB Reports” for the latest report.
- Always submit SEP before uploading any attendance for any students.
- Upload attendance in a timely manner.
- Provide all necessary information such as batch#, OSIS#, error message and a screenshot when you send an email to NCLB Support.
- Always check if the student is active or discharged before providing the service. Once discharged, the students must be re-enrolled before providing the service.

Don’ts
- Do not upload a file more than 4MB or 1000 records at a time.
- Do not wait for the certification period to upload attendance. Attendance can be uploaded and submitted anytime.
- Do not modify fields with blue header when you down a report from NCLB Reports.

21. How do I request support for Vendor Portal related questions?

Vendor Portal Technical Inquiry form

Fill out the form below for requesting any assistance from the Vendor Portal technical group. Send it to nclb-ses@schools.nyc.gov. Do not send any PETS inquiries, data change requests, or policy related questions to this mailbox.

Errors relating to policies or data changes must be sent to Program Office by emailing to nclbses@schools.nyc.gov where the Program Office can review the requests and evaluate if they are legitimate concerns.

Request Date (*mm/dd/yyyy*):

Provider Name:

Provider ID (*three-digit provider ID*):

Have you read this Vendor Portal user guide in it’s entirety? (Yes/No):

Remaining part of the form is not applicable if the answer of the above question is No.
The inquiry will not be processed if it is found as the case.

Area of issue:

1. Attendance upload (bulk): ___
2. Attendance upload (one-by-one) ___
3. Vendor Admin ___

Description:

Please describe with examples (Please provide details such as Batch ID, Attendance ID, Instructor IDs, Service Dates, size-compressed screenshots, etc. because they will expedite the processing for the inquiry.)

1. What system behavior are you expecting?

   Insert the description of your expectation here. This will help us evaluate if your demand is legitimate. Elaborate as much as possible for speedier processing.

2. What system behavior is not per your expectation(s)?

   Insert the description of any bug here. This will help us diagnose the issue. Elaborate as much as possible for speedier processing.