



Assigning a Contract Agency for Community School/ D75/Charter School Students

Introduction

This training guide provides instructions for CSEs on the *Provider Assignment* process of assigning Contract Agencies for Community School, District 75, and Charter School Students. The instructions are divided into two sections: [Primary Contract Agency](#) and [Secondary/Tertiary Contract Agency](#).

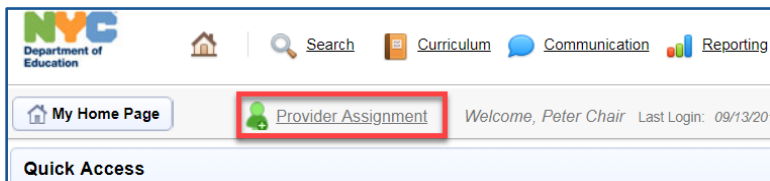
Primary Contract Agency

When efforts to locate a DOE provider are unsuccessful, the assignment of a contract agency may commence, which begins with searching for a primary contract agency.

Note: For Charter School students, skip to the [Assign a Primary Contract Agency](#) section of this document.

Move Mandate(s) to the Awaiting Contract Agency Sub-Tab

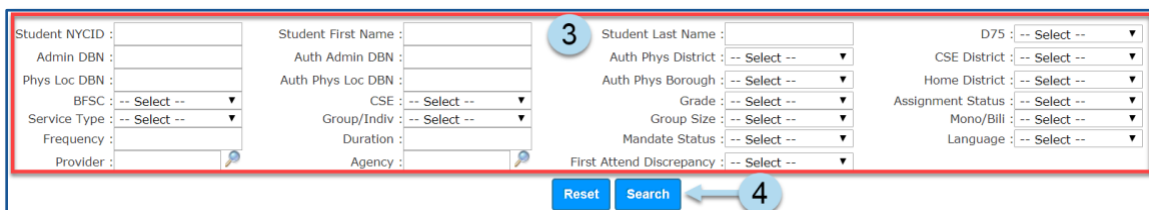
1. Navigate to **Provider Assignment** from the SESIS home page. The *Awaiting DOE Provider* sub-tab of the *Awaiting* tab is displayed by default.





2. Click the **Search** link to open the panel.



3. **Set the filters** to display the mandate(s) to be assigned to a *Primary Contract Agency*.
4. Click **Search** at the bottom of the search panel.



5. From the search results, click the **pencil icon** in the far left column to view mandate details.

Select	Student NYCID	Last Name	First Name
	705491313	T	C
	705491313	T	C

6. **Verify** that the mandate(s) reflect what is under the *Recommended Special Education Programs and Services* section of the student's last finalized *Individualized Education Program (IEP)*. Click **Cancel** to exit the mandate details window, or click **Save Changes** to save any edits.

Student :

Student NYCID: 123456789	First Name: JANE	Last Name: SMITH	DOB: 06/24/2001
Attending Admin DBN: 84M350	Auth Admin DBN: 84M350	CSE: CS10	Grade: 11TH GRADE
Attending Physical DBN: 84M350	Auth Physical DBN: 84M350	CSE District: 05	Home District: 5

IEP:

IEP ID: 1234567	IEP Conference Date:	Parentally Placed: No
Source Document Type: IEP	IEP Authorization Date: 09/01/2017	Initial Case: Yes

Mandate:

Is this a Compensatory Service? No	10 month/2 month: 10 month	Service Type: S.E. Teacher Support Service (SETSS)
Is this for an Interim monolingual provider? No	Service Start Date: 08/01/2017	Language: ENGLISH
Indiv/Group: Group	Frequency: 3	Duration: 1
Group Size: 8	Frequency Terms: Weekly	Duration Terms: Periods

Assigned Provider:

Provider Name:	Assignment Status: Assistance Not Requested	First Attend Date:
Assigned Frequency:	Agency TaxID:	

Cancel Save Change

Note: When editing the DBN values with the pencil icon, a soft warning will appear, allowing the user to proceed with the DBN change or cancel.

Warning – if the student is changing schools, this should be indicated in the student's profile in SESIS, the system of record. Changing the DBNs in SESIS will cause an update to the student's current mandates in PA within 24 hours. If you proceed with making this update here, you risk making the information in PA out of sync with its parent application, SESIS.

If you choose to proceed, the DBN values will be updated on this mandate only. The remaining active mandates for this student in PA may have differing DBN information.

7. Place a **checkmark** next to the mandate(s) to be moved to the *Awaiting Contract Agency* tab.

Select	Student NYCID	Last Name	First Name
<input checked="" type="checkbox"/>	705491313	T	C
<input type="checkbox"/>	705491313	T	C

8. From the *Change Assignment Status* dropdown, select **Requested Contract Agency** and click the **Change Assignment Status** button.

9. Click **OK** in the pop-up window to confirm changing the *Assignment Status*.

Student NYCID	Last Name	First Name
705491313	T	C

Note: A confirmation message will appear.

Mandate(s) were updated.

Assign a Primary Contract Agency

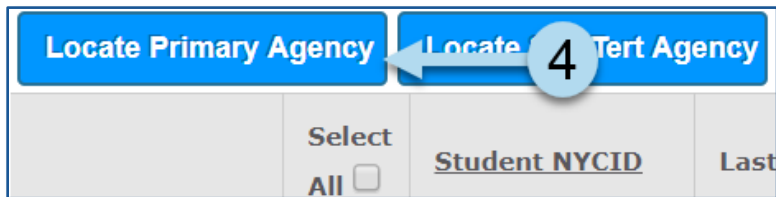
1. Click on the **Awaiting Contract Agency** sub-tab.

2. Use the **Search** feature to display the mandates(s) to be assigned a *Primary Contract Agency*, if not already visible.

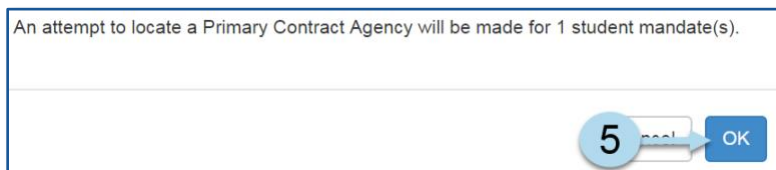
3. Place a **checkmark** next to the mandate(s).

Select	Student NYCID	Last Name	First Name
<input checked="" type="checkbox"/>		T	C
<input type="checkbox"/>	705491313	T	C

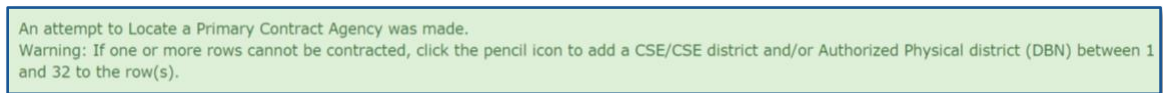
- Click the **Locate Primary Agency** button.



- Click **OK** in the pop-up window to confirm that an attempt will be made to locate a *Primary Contract Agency*.



Note: The system will display a message at the top of the screen confirming an attempt to locate a *Primary Contract Agency* was made. If a primary agency has been identified by the DOE, the *Agency* column will populate with the name of the contract agency and change the *Assignment Status* to *Awaiting Contract Agency Provider*.

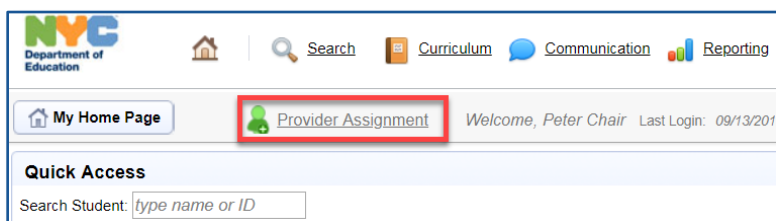


Secondary/Tertiary Contract Agency

When efforts to locate a primary contract agency provider are unsuccessful, the search for a secondary/tertiary agency may commence.

Search for Mandate(s) to Assign a Secondary/Tertiary Contract Agency Provider

- Navigate to **Provider Assignment** from the SESIS home page. The *Awaiting DOE Provider* sub-tab of the *Awaiting* tab is displayed by default.



- Click the **Awaiting Contract Agency** sub-tab.



3. Click the **Search** link to open the search panel.



4. **Set the filters** to display the mandate(s) to be assigned a *Secondary/Tertiary Contract Agency*.

5. Click **Search** at the bottom of the search panel.

6. Place a **checkmark** next to the mandate(s) to be assigned a *Secondary/Tertiary Contract Agency*.

Select	Student NYCID	Last Name	First Name
<input type="checkbox"/>		T	C

Note: Select mandate(s) only with the following *Assignment Status* values: *Contract Agency Rejected*, *Contract Agency Timeout*, *Primary Contract Agency Does Not Exist*, and, if bypassing *Primary Contract Agency* search, *Requested Contract Agency*.

7. Click the **Locate Sec/Tert Agency** button. This will display the **Secondary/Tertiary Contract Agency Look-Up** screen.

Note: If selecting multiple mandates, the *Service Type* and *Language* must be the same, or you will receive an error message.

Example:

You are attempting to locate contract agencies for student mandates with different Service Type. Please ensure that the selected mandates share the same Service Type before attempting to locate an agency.

OK

Send Notification to Solicit a Bid

Continue to the **Secondary/Tertiary Contract Agency Look-Up** screen.

1. Input a **Response Due Date**.
2. Place a **checkmark** next to the agencies to send a bid invitation to service the student's mandate. A SESIS notification will be sent to the supervisor of each contract agency selected for this batch.

Select All	Contract Line Item ID#	Agency Name	Service Type	Language	Borough	District	Tier	Rank
<input type="checkbox"/>		Sample Agency, Inc.	Speech-Language Therapy	ENGLISH	Bronx	11	Secondary	1
<input type="checkbox"/>	54321	Sample Agency, LLC	Speech-Language Therapy	ENGLISH	Bronx	11	Secondary	2

Note: Agencies must be selected in the tier/rank order they are listed. You may decide to skip to agencies at a higher tier/rank to be a part of this batch notification, but they must still be selected in the order they are listed.

3. Click **Notify Agency** and click **Send** in the pop-up window to confirm that a SESIS Inbox message will be sent to the selected agencies' supervisors.

A SESIS inbox notification will be sent to the supervisor of each contract agency selected for this batch. The Response Due Date is 10/17/2019.

Close Send

Tertiary	3
Tertiary	4
Tertiary	5
Tertiary	6
Tertiary	6
Tertiary	6
Tertiary	7
Tertiary	8
Tertiary	8
Tertiary	8
Tertiary	8

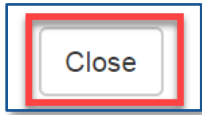
Close Notify Agency

Note: The system will display a message at the top of the screen confirming the batch notification was successfully created. The *Assignment Status* changes to *Pending Contract Agency Bid Responses*.

The batch notification was successfully created. The agency supervisors for the selected contract agencies will receive a notice in their SESIS inbox regarding the open cases included in this batch.

The selected agencies will log into SESIS, navigate to *Provider Assignment* and submit their bids on each mandate. Staff reviews the submitted bids when the *Response Due Date* arrives and the bidding has been closed. The system will automatically recommend the highest ranked *Contract Agency/Provider*, and staff has the option to award one of the recommended agencies.

4. To close the *Secondary/Tertiary Contract Agency Look-Up* screen, click **Close**.



Ready to Award to Contract Agency

1. After the contract agency bidding process for the mandate(s) has closed and the *Assignment Status* is *Bidding Closed / Ready to Award*, click on the **Award icon** to award an agency.

Select	Student NYCID	Last Name	First Name
<input type="checkbox"/>	676780671	T	C
<input type="checkbox"/>	663230166	T	C

2. If one or more agencies placed a bid, the system-recommended contract agency will be listed first and be automatically selected. Click the **Award Agency** button to award the case to the contract agency.

Award Contract Agency

Student Information: #676780671

First Name	Last Name:	DOB	Grade:
Admin DBN	Auth Admin DBN:	District	CSE District:
Physical DBN	Auth Physical DBN:	Borough	Home District:
Cluster:	Network:	CSE:	D75: N

Speech-Language Therapy

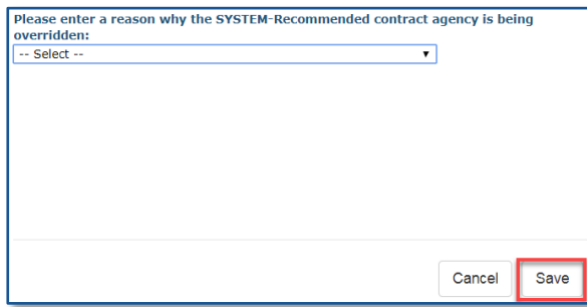
Frequency:	Duration: 30 Minutes	Group Size:	Language:
Start Date: 09/01/2017	End Date:	Mandate Status: Unassigned	

Response Due Date: 09/29/2017 Number Of Bids: 24

Contract Agency Name	Bidder Provider	Bidder Freq	Service Type	Language	Borough	District	Tier	Rank
<input checked="" type="radio"/> Sample Agency, Inc.		1	Speech-Language Therapy	ENGLISH	Manhattan	84	Tertiary	6
<input type="radio"/> Sample Agency, LLC		1	Speech-Language Therapy	ENGLISH	Manhattan	84	Tertiary	6
<input type="radio"/> Training Agency, Inc.		1	Speech-Language Therapy	ENGLISH	Manhattan	84	Tertiary	9
<input type="radio"/> Training Agency, LLC			Speech-Language Therapy	ENGLISH	Manhattan	84	Secondary	1
<input type="radio"/> Generic Agency			Speech-Language Therapy	ENGLISH	Manhattan	84	Secondary	1

2

Note: The message below will appear if a different contract agency is selected other than the system-recommended contract agency. Select the reason why the system-recommended contract agency is being overridden and click **Save**.

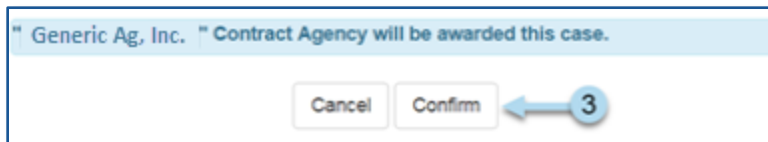


Please enter a reason why the SYSTEM-Recommended contract agency is being overridden:

-- Select --

Cancel Save

3. Click **Confirm**.

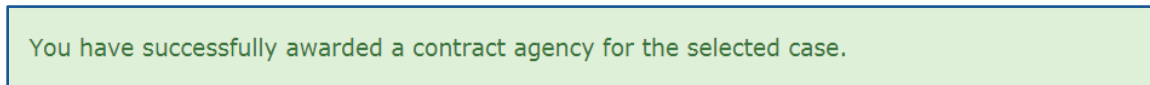


" Generic Ag, Inc. " Contract Agency will be awarded this case.

Cancel Confirm

3

4. A confirmation note will appear at the top of the screen stating that a contract agency has been awarded for the case.



You have successfully awarded a contract agency for the selected case.

Note: The assignment status for the case has now changed to *Awaiting First Attend*.