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.

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.

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

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.

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).
4. Click the **Locate Primary Agency** button.

![Locate Primary Agency](image)

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

![Click OK to confirm attempt](image)

**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*.

![Message confirming attempt](image)

**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**

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

![Provider Assignment](image)

2. 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.

   **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


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.

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.

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 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.


**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.

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.
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**.

3. Click **Confirm**.

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*. 