



Provider Assignment Checklist: First Attending, Confirming and Rejecting Assignments (for Independent Providers)

Introduction

This training guide provides instruction for independent providers on how to record a *First Attend Date*, *Confirm Assignments*, and *Reject Assignments* in *Provider Assignment* when servicing students through a *Related Service Authorization (RSA)*.

Recording a First Attend

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

Note: This option is also available under the *Awaiting Contract Agency* and *Awaiting SETSS Auth.* sub-tabs.

- Click **Search** to open the search panel.
- Set the filter for an *Assignment Status* of **Awaiting First Attend**.
- Click **Search** at the bottom of the search panel.
- Place a **checkmark** next to the mandate(s) for which you want to *First Attend* and click the **First Attend** button.
- For each mandate displayed in the *First Attend Confirmation* screen, **enter the date** you first provided services to the student in the *First Attend* field, and then click **OK**. The mandate will move from the *Awaiting RSA*, sub-tab to its counterpart *Receiving RSA* sub-tab.

Recording First Attend Delay

A *First Attend Date* must be entered within five school days after the mandate is assigned to the provider; otherwise, a *First Attend Delay* icon will appear in the left margin of the mandate row.



- Navigate to the *Awaiting RSA* sub-tab.

Note: This option is also available under the *Awaiting Contract Agency* and *Awaiting SETSS Auth.* sub-tabs.

- Click **Search** to open the search panel.
- Set the filter for an *Assignment Status* of **Reason for Delay Needed**.

- ❑ Click **Search** at the bottom of the search panel.
- ❑ Click on the **First Attend Delay** icon and enter a reason for the delay.
- ❑ Click **OK**.

Never Served/Retroactively First Attend

For rows with *Assignment Status* reason *Terminated Without First Attend*, a new icon will appear that triggers a new pop-up window when clicked. This window gives the provider an opportunity to retroactively enter the *First Attend Date* (FAD), or state that they never served the child.



- ❑ Navigate to the *Awaiting RSA* sub-tab.

Note: This option is also available under the *Awaiting Contract Agency* and *Awaiting SETSS Auth.* sub-tabs.

- ❑ Click **Search** to open the search panel.
- ❑ Set the filters for an *Assignment Status* of **Terminated Without First Attend**.
- ❑ Click **Search** at the bottom of the search panel.
- ❑ Click on the **Never Served/Retroactively First Attend** icon.
- ❑ To *Retroactively First Attend*, select the **Student NYCID** under the *Retroactively First Attend This Case* section and enter the **First Attend date** and **Reason for Discrepancy**.

Note: The only *Reason for Discrepancy* available is *Other*. Describe the reason in the adjacent textbox.

- ❑ To indicate that you *Never Served*, select the **Student NYCID** under the *Never Served* section and select the **Reason** from the dropdown menu.

Note: If the *Reason* is *Other*, describe the reason in the adjacent textbox.

Retroactively First Attend This Case ✕

⚠ The **First Attend Date** indicated here should be the [first date the assigned provider actually provided services](#). The assigned provider will not be permitted to submit invoices for this [related/SETSS] service before this date.

Student NYCID	Last Name	First Name	Current Provider	Service Start Date	Earliest Encounter	First Attend	Reason For Discrepancy	Other Reason For Discrepancy
<input type="radio"/>	223679895	CROSBY	AHMAD	Leah Kermanian	08/01/2019	MM/DD/YYYY	-- Select a reason --	

Never Served

⚠ Entering a **Never Served** reason will update the assignment and remove any association of the assigned provider with this student. The assigned provider will not be permitted to submit invoice for this [related/SETSS] service at all. Once submitted, the student mandate will be updated to *Terminated Never Served*.

Student NYCID	Last Name	First Name	Current Provider	Service Start Date	Reason	Other Reason	
<input type="radio"/>	223679895	CROSBY	AHMAD	Leah Kermanian	08/01/2019	-- Select a reason --	

Confirming or Rejecting an Assignment

When the *Attending DBNs (Admin DBN/ Phys Loc DBN)* change for students with an *RSA* already created and fully assigned (not split), a new *RSA* package will be automatically generated in *DRAFT* mode after the provider fully confirms, unless they reject the assignment.

Note: Changes to the student's *Attending DBNs* in *SEGIS* will not be seen in *Provider Assignment* until the next business day.

- Navigate to the *Awaiting RSA* sub-tab.
- Click **Search** to open the search panel.
- Set the filters for an *Assignment Status* of **Awaiting Independent Provider Confirmation**.
- Click **Search** at the bottom of the search panel.
- To *Confirm* or *Reject* the assignment, **place a checkmark** next to each service recommendation(s) you'll continue to service or wish to reject, then click **Confirm**.
- To *Confirm* the assignment, click **OK**.

Note: The mandate will stay on the grid with an updated *Assignment Status* of *Awaiting First Attend*.

- To *Reject* the assignment, check the **Reject** checkbox, select a **Reason for Rejection** as to why you are not continuing service, and then click **OK**.

Note: The mandate will immediately fall off your service recommendation grid in order to be assigned to another provider.