



Preschool Provider Assignment for Contract Agency Supervisor

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Introduction

This guide provides the steps for Contract Agency Supervisors to follow in Provider Assignment when providing special education services to preschool students.

This includes:

- For Supervisors in a Primary Agency:
 - Assigning a provider
 - Rejecting Assignment
 - Rejecting a Case

- For Supervisors in a Secondary or Tertiary Agency:
 - Submitting a bid
 - Declining a bid

- All Supervisors:
 - Entering First Attend
 - Reassigning a provider
 - Terminating a provider

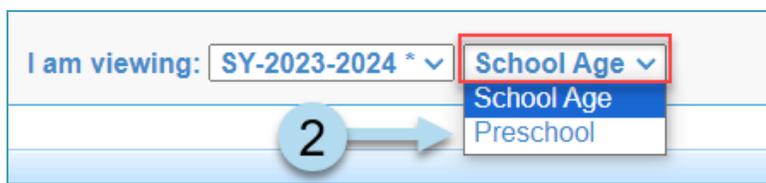
Primary Agency Supervisors

Assigning a Provider

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



2. From the *School Age* dropdown, select **Preschool**.



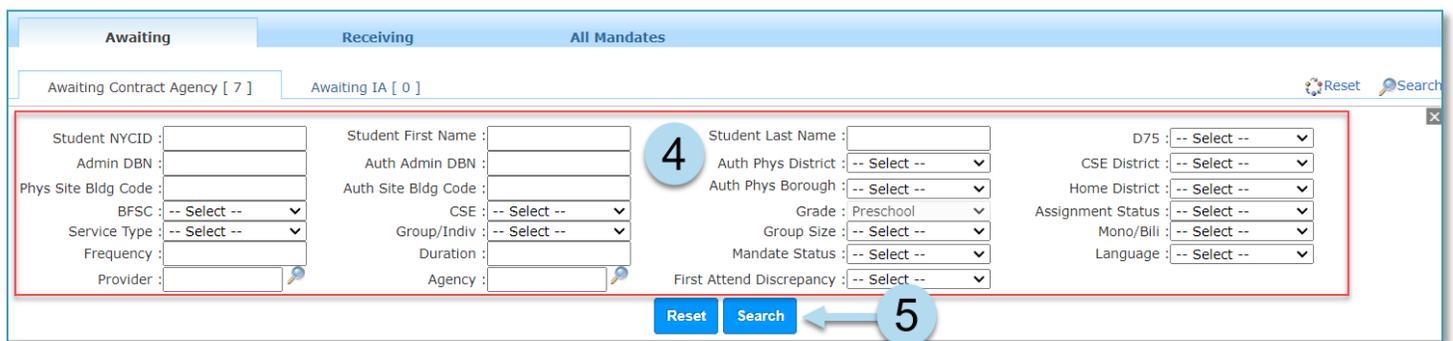
Note: Before taking action, verify the term under the *I am viewing* dropdown.



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



4. **Set the filters** to display the mandate(s) to assign a provider.
5. Click **Search** at the bottom of the search panel.

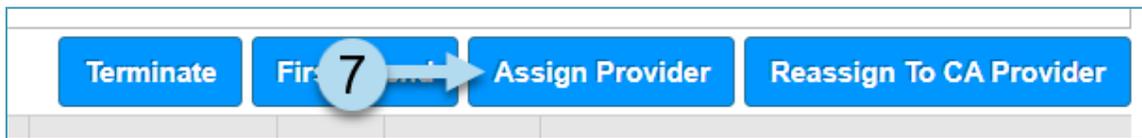


6. Place a checkmark next to the mandate(s) to be assigned a provider.

	Select All <input type="checkbox"/>	Student NYCID	Last Name	First Name
 	<input type="checkbox"/>	303590101	K	Y
 	<input checked="" type="checkbox"/>	303590101	K	Y
 	<input type="checkbox"/>	303629274	E	A

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

7. Click **Assign Provider**.



8. Look for the provider to assign by using the available filters and clicking **Search**.

Contract Agency Provider Look-Up: ✕

SSN: Last Name: First Name:
 Service Type: Speech-Language Therapy Language: -- Select --

Reset
Search
Assign Provider

9. Select the provider and click **Assign Provider**.

	SSN	Last Name	First Name	Service Type	Primary Language	Secondary Language
<input type="radio"/>	XXX-XX- XXX	S	B	Speech-Language Therapy	YIDDISH	
<input type="radio"/>	XXX-XX- XXX	S	L	Speech-Language Therapy	YIDDISH	
<input type="radio"/>	XXX-XX- XXX	R	S	Speech-Language Therapy	YIDDISH	
<input type="radio"/>	XXX-XX- XXX	S	P	Speech-Language Therapy	YIDDISH	
<input type="radio"/>	XXX-XX- XXX	M	A	Speech-Language Therapy	YIDDISH	
<input type="radio"/>	XXX-XX- XXX	W	D	Speech-Language Therapy	YIDDISH	
<input checked="" type="radio"/>	XXX-XX- XXX	S	E	Speech-Language Therapy	YIDDISH	
<input type="radio"/>	XXX-XX- XXX	B	E	Speech-Language Therapy	YIDDISH	
<input type="radio"/>	XXX-XX- XXX	W	M	Speech-Language Therapy		YIDDISH
<input type="radio"/>	XXX-XX- XXX	H	Z	Speech-Language Therapy	YIDDISH	
<input type="radio"/>	XXX-XX- XXX	W	J	Speech-Language Therapy	YIDDISH	
<input type="radio"/>	XXX-XX- XXX	P	T	Speech-Language Therapy	YIDDISH	

10. The provider is now fully assigned and has an *Awaiting First Attend Assignment Status*.

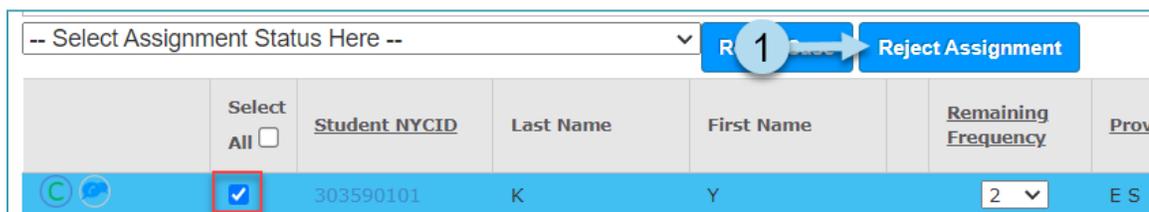
	Select All <input type="checkbox"/>	Student NYCID	Last Name	First Name	Provider	Mandate Status	Assignment Status
 	<input type="checkbox"/>	303590101	K	Y	E S	Fully Assigned	Awaiting First Attend

Rejecting Assignment

If the assigned provider can no longer take the case, you may reject the assignment to be able to assign to another provider.

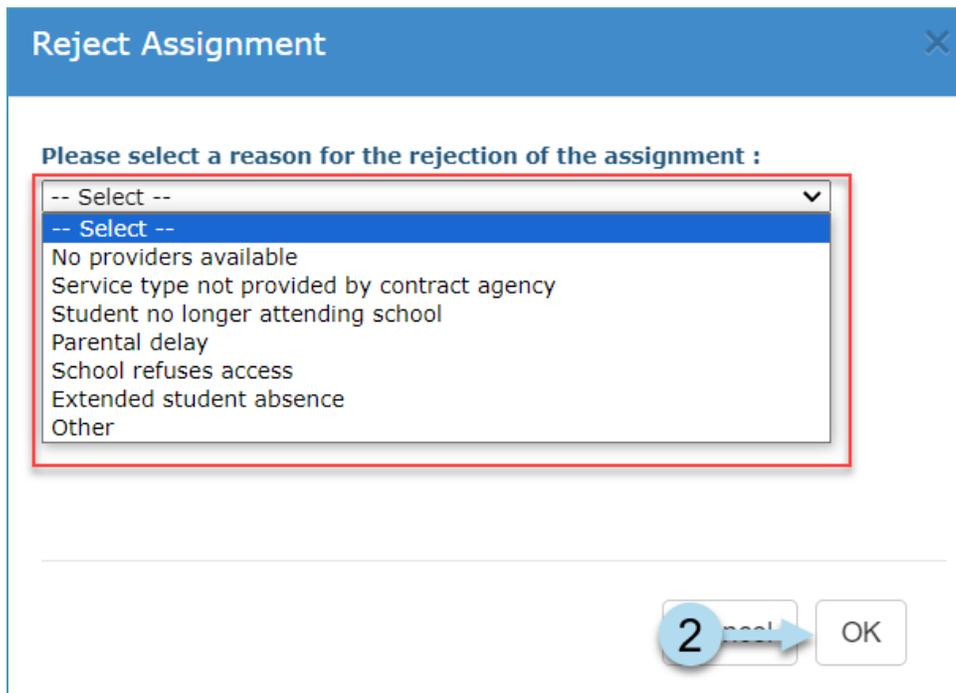
Note: *Assignment Status* must be *Awaiting First Attend* for this scenario.

1. From the *Awaiting Contract Agency* sub-tab, place a checkmark next to the mandate(s) to be rejected and click **Reject Assignment**.



The screenshot shows a table with columns: Select All, Student NYCID, Last Name, First Name, Remaining Frequency, and Prov. The first row is highlighted in blue. A blue checkmark is in the 'Select All' column. A blue button labeled 'Reject Assignment' is visible, with a circled '1' and an arrow pointing to it.

2. Select a reason for the rejection of the assignment and click **OK**.



The dialog box titled 'Reject Assignment' contains a dropdown menu with the following options: -- Select --, -- Select --, No providers available, Service type not provided by contract agency, Student no longer attending school, Parental delay, School refuses access, Extended student absence, and Other. A circled '2' and an arrow point to the 'OK' button at the bottom right.

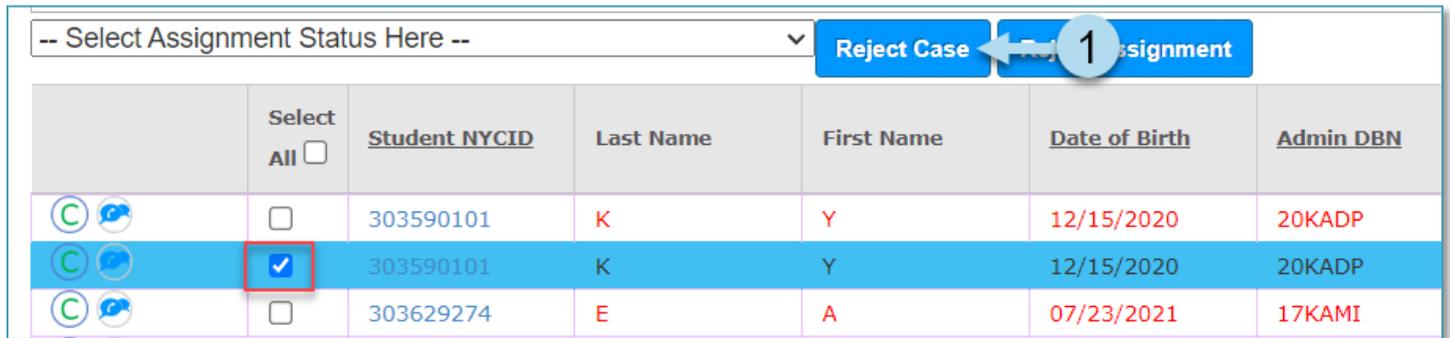
Note: The *Assignment Status* will update to *Awaiting Contract Agency Provider*.

Rejecting a Case

If the contract agency can no longer accept the case, you may reject it.

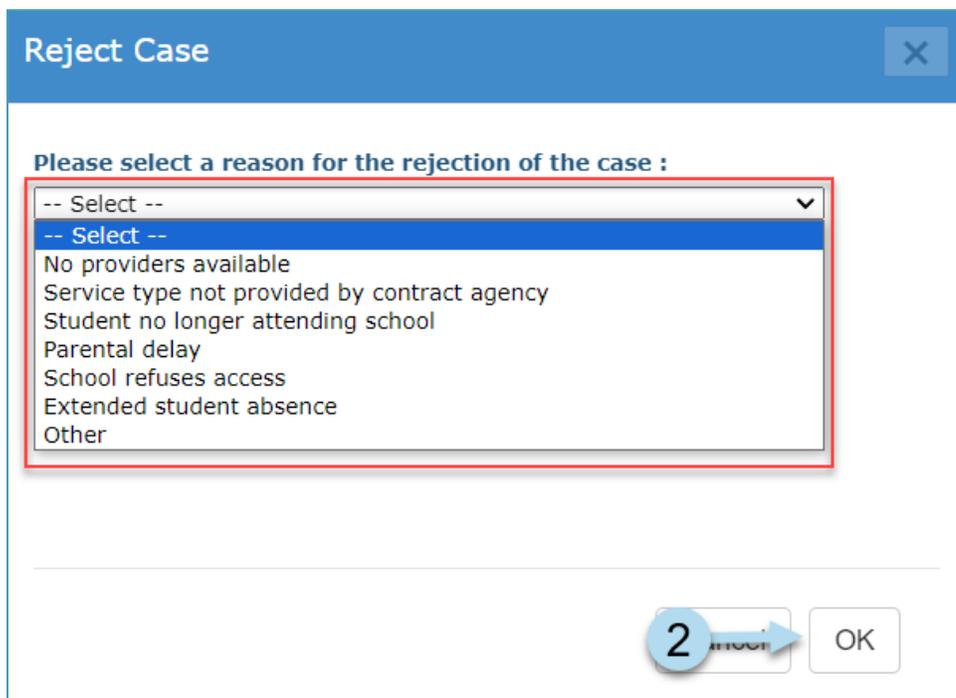
Note: The *Assignment Status* must be *Awaiting Contract Agency Provider* for this scenario.

1. From the *Awaiting Contract Agency* sub-tab, place a checkmark on the mandate(s) and click **Reject Case**.



	Select All <input type="checkbox"/>	Student NYCID	Last Name	First Name	Date of Birth	Admin DBN
	<input type="checkbox"/>	303590101	K	Y	12/15/2020	20KADP
	<input checked="" type="checkbox"/>	303590101	K	Y	12/15/2020	20KADP
	<input type="checkbox"/>	303629274	E	A	07/23/2021	17KAMI

2. Select a reason for the rejection of the case and click **OK**.



Reject Case

Please select a reason for the rejection of the case :

- Select --
- Select --
- No providers available
- Service type not provided by contract agency
- Student no longer attending school
- Parental delay
- School refuses access
- Extended student absence
- Other

2 → OK

Note: The *Assignment Status* will update to *Requested Contract Agency*.

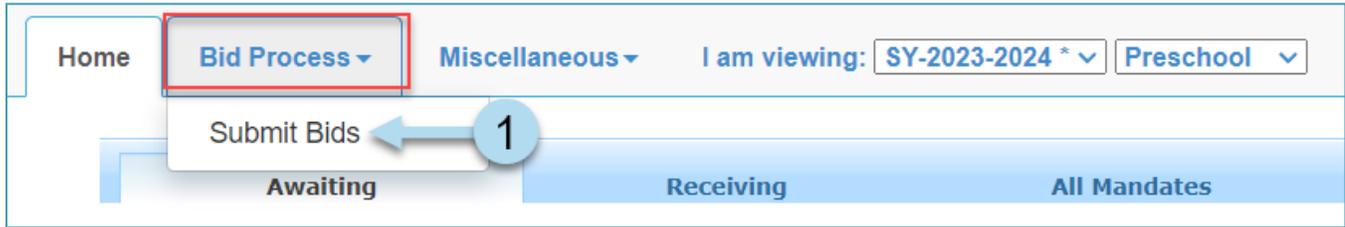
Additionally, the mandate is removed from the Contract Agency's PA view as their Tax ID will no longer be associated with the student for that particular mandate.

Secondary or Tertiary Agency Supervisors

Submitting a Bid

Once DOE Staff sends notification to solicit a bid, secondary/tertiary agency supervisors can submit for it.

1. From the *Bid Process* dropdown, click **Submit Bids**.



2. Place a checkmark on the mandate(s) and click **Indicate Provider**.

The screenshot shows a table titled 'Submit Bids' with columns: Select, Batch #, Response Due By, Bid Status, Student NYCID, Last Name, First Name, Date of Birth, Admin DBN, Phys Site Bldg Code, D75, and Home District. The second row is selected with a checkmark in the 'Select' column. A blue arrow and a circled '2' point to the 'Indicate Provider' button in the top right corner.

Select	Batch #	Response Due By	Bid Status	Student NYCID	Last Name	First Name	Date of Birth	Admin DBN	Phys Site Bldg Code	D75	Home District
<input type="checkbox"/>	218045	04/24/2024	In Progress	774497952	B	E	02/23/2020	84X632	12 XCHM	N	12
<input checked="" type="checkbox"/>	218044	04/24/2024	In Progress	772540146	G	A	03/03/2020	84X487	08 X052	N	12

3. Look for the provider to assign by using the available filters and clicking **Search**.

The screenshot shows a form titled 'Contract Agency Provider Look-Up:'. It has input fields for SSN, Last Name, and First Name. There are dropdown menus for Service Type (set to 'Speech-Language Therapy') and Language (set to '-- Select --'). Below the form are buttons for 'Reset', 'Search', and 'Assign Provider'. A blue arrow and a circled '3' point to the 'Search' button.

4. Select the provider and click **Assign Provider**.

	SSN	Last Name	First Name	Service Type	Primary Language	Secondary Language
<input type="radio"/>	XXX-XX-	M	S	Speech-Language Therapy		
<input type="radio"/>	XXX-XX-	R	B	Speech-Language Therapy	ENGLISH	
<input checked="" type="radio"/>	XXX-XX-	H	A	Speech-Language Therapy	ENGLISH	
<input type="radio"/>	XXX-XX-	K	J	Speech-Language Therapy		
<input type="radio"/>	XXX-XX-	A	B	Speech-Language Therapy		
<input type="radio"/>	XXX-XX-	P	E	Speech-Language Therapy		
<input type="radio"/>	XXX-XX-	D	S	Speech-Language Therapy		
<input type="radio"/>	XXX-XX-	P	H	Speech-Language Therapy		
<input type="radio"/>	XXX-XX-	M	S	Speech-Language Therapy	ENGLISH	
<input type="radio"/>	XXX-XX-	S	S	Speech-Language Therapy	ENGLISH	
<input type="radio"/>	XXX-XX-	D	L	Speech-Language Therapy		
<input type="radio"/>	XXX-XX-	H	R	Speech-Language Therapy	ENGLISH	

← **4**

Note: Agency Supervisor may split the bid frequency if selected provider can only service a portion of the student's mandated frequency.

Agency	Bid Freq	Bid Provider
Y	2	
Y	2	
Y	1	

Note: A message will appear stating that the contract agency has been assigned successfully.

Contract Agency Provider has been assigned successfully.

Note: If unable to support the full mandated frequency, agency supervisors may submit bids for the portion of the frequency for which they are able to provide the service. However, during the award process, bids submitted for the full frequency receive preference in the system.

Declining a Bid

By choosing not to participate in the bidding, the agency supervisor is declining to bid and no action is required. The mandate will eventually fall off the grid after the *Response Due Date* has passed.

All Supervisors

Reassigning a Provider

If the assigned provider cannot take the case but there is another one available, you may reassign to the new provider.

Note: The Assignment Status must be *Awaiting First Attend* or *Reason for Delay Needed* for this scenario.

Also note, you may also reassign from the *Receiving* sub-tabs for rows that have not been terminated and with *Assignment Status* of *Receiving*.

1. From the *Awaiting Contract Agency* sub-tab, place a checkmark on the mandate(s) and click **Reassign To CA Provider**.

Select All	Student NYCID	Last Name	First Name	Date of Birth	Admin DBN	Phys Site Bldg Code	D75	Home District	Service Type
<input checked="" type="checkbox"/>	303629274	E	A	07/23/2021	17KAMI	17 KAMI	N	17	Occupational Therapy

2. Look for the provider to assign by using the available filters and clicking **Search**.

Contract Agency Provider Look-Up

SSN: Last Name: First Name:
Service Type: Occupational Therapy Language: -- Select --

Reset Search Reassign Provider

3. Select the provider and click **Reassign Provider**.

	SSN	Last Name	First Name	Service Type	Primary Language	Secondary Language
<input type="radio"/>	XXX-XX-	H	D	Occupational Therapy		
<input type="radio"/>	XXX-XX-	M	C	Occupational Therapy		
<input type="radio"/>	XXX-XX-	L	D	Occupational Therapy		
<input checked="" type="radio"/>	XXX-XX-	G	T	Occupational Therapy	ENGLISH	
<input type="radio"/>	XXX-XX-	R	Y	Occupational Therapy		
<input type="radio"/>	XXX-XX-	B	M	Occupational Therapy		
<input type="radio"/>	XXX-XX-	T	R	Occupational Therapy		
<input type="radio"/>	XXX-XX-	K	I	Occupational Therapy		
<input type="radio"/>	XXX-XX-	k	H	Occupational Therapy		
<input type="radio"/>	XXX-XX-	D	J	Occupational Therapy		
<input type="radio"/>	XXX-XX-	F	J	Occupational Therapy	ENGLISH	
<input type="radio"/>	XXX-XX-	O	K	Occupational Therapy	ENGLISH	
<input type="radio"/>	XXX-XX-	C	M	Occupational Therapy		
<input type="radio"/>	XXX-XX-	T	L	Occupational Therapy		
<input type="radio"/>	XXX-XX-	S	A	Occupational Therapy		

1 - 15 of 3691 Records Next > Last >

Reassign Provider

- Select a **Reason** why you are reassigning.
- Enter a **Reassign Date**.
- Click **OK**.

Reassign Provider

! The Reassignment Date indicated here should be the last date the previously assigned provider actually provided services. The previously assigned provider will not be permitted to submit invoices for this Related service beyond this date.

New Provider: **S M**

Student NYCID	Last Name	First Name	Current Provider	Reason	Other Reason	Reassign Date
765540530	R	J	A S	<div style="border: 1px solid red; padding: 2px;"> -- Select a reason -- -- Select a reason -- Provider no longer available DOE provider available Contract Agency provider available Provider assigned in error Other </div>		

OK

Note: The *Assignment Status* for the mandate that was reassigned will show as *Terminated Without First Attend* and a new mandate line will appear for the new provider with *Assignment Status* of *Awaiting First Attend*.

	Select All <input type="checkbox"/>	Student NYCID	Last Name	First Name	Provider	Mandate Status	Assignment Status
	<input type="checkbox"/>	303590101	K	Y	R G	Unassigned	Terminated Without First Attend
	<input type="checkbox"/>	303590101	K	Y		Unassigned	Awaiting Contract Agency Provider
	<input type="checkbox"/>	303629274	E	A	R G	Fully Assigned	Terminated Without First Attend
	<input type="checkbox"/>	303629274	E	A	M D	Fully Assigned	Awaiting First Attend
	<input type="checkbox"/>	303629274	E	A		Unassigned	Awaiting Contract Agency Provider

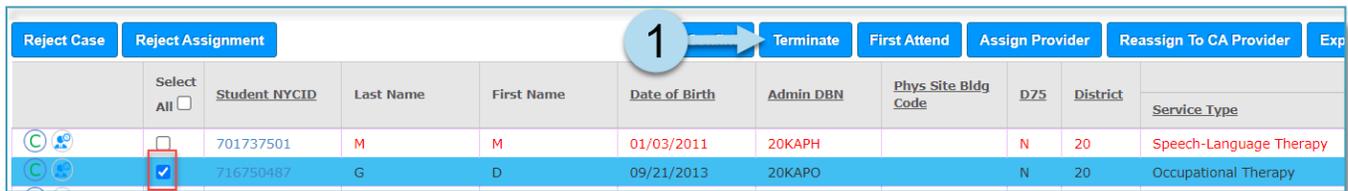
Terminating a Provider

If the assigned provider cannot take the case and there is no other provider available to reassign, you may terminate and assign a new provider at a later date.

1. From the *Awaiting Contract Agency* sub-tab, place a checkmark on the mandate(s) and click **Terminate**.

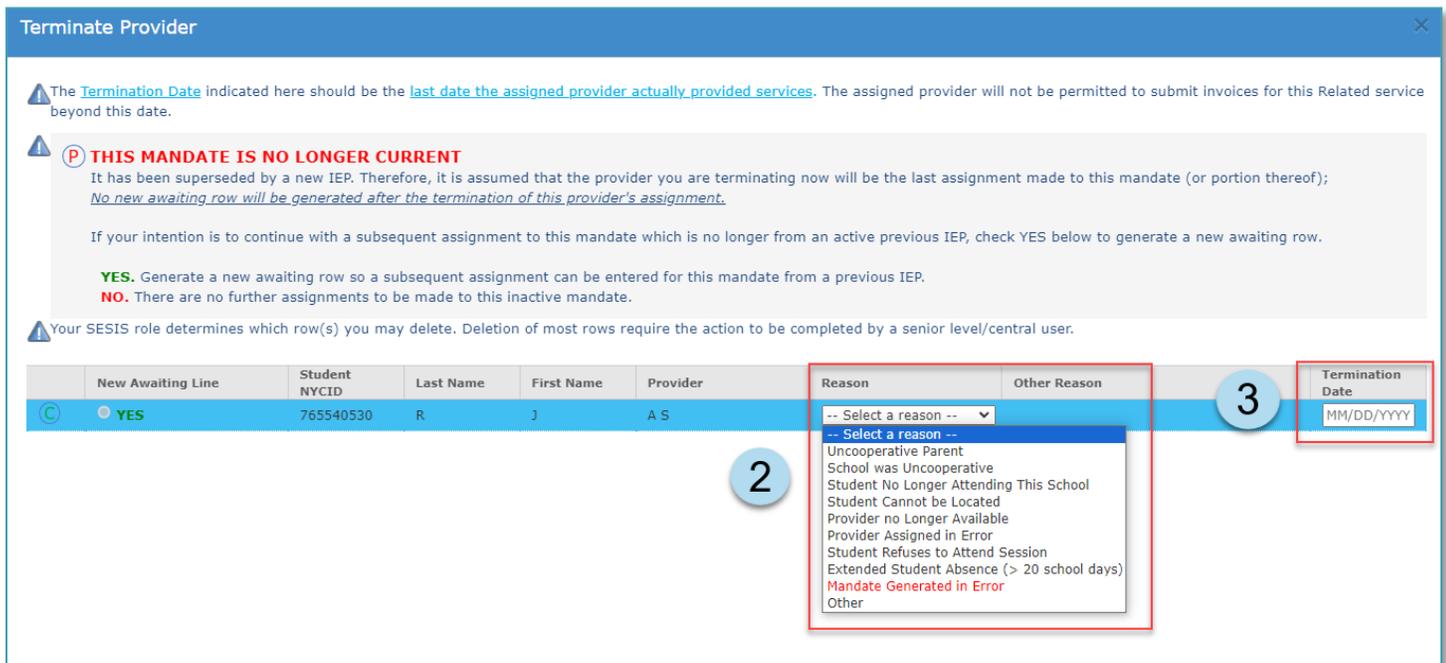
Note: The *Assignment Status* must be *Awaiting First Attend* if terminating from the *Awaiting Contract Agency* sub-tab.

Additionally, termination can also be done from the *Receiving Contract Agency* sub-tab with *Assignment Status* of *Receiving*.



Reject Case		Reject Assignment				Terminate	First Attend	Assign Provider	Reassign To CA Provider	Exp
Select	Student NYCID	Last Name	First Name	Date of Birth	Admin DBN	Phys Site Bldg Code	D75	District	Service Type	
<input type="checkbox"/>	701737501	M	M	01/03/2011	20KAPH		N	20	Speech-Language Therapy	
<input checked="" type="checkbox"/>	716750487	G	D	09/21/2013	20KAPO		N	20	Occupational Therapy	

2. Select a **Reason** from the dropdown.
3. Enter a **Termination Date**.



Terminate Provider

The **Termination Date** indicated here should be the last date the assigned provider actually provided services. The assigned provider will not be permitted to submit invoices for this Related service beyond this date.

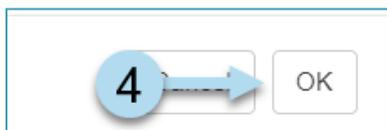
THIS MANDATE IS NO LONGER CURRENT
It has been superseded by a new IEP. Therefore, it is assumed that the provider you are terminating now will be the last assignment made to this mandate (or portion thereof); No new awaiting row will be generated after the termination of this provider's assignment.
If your intention is to continue with a subsequent assignment to this mandate which is no longer from an active previous IEP, check YES below to generate a new awaiting row.
YES. Generate a new awaiting row so a subsequent assignment can be entered for this mandate from a previous IEP.
NO. There are no further assignments to be made to this inactive mandate.

Your SESIS role determines which row(s) you may delete. Deletion of most rows require the action to be completed by a senior level/central user.

New Awaiting Line	Student NYCID	Last Name	First Name	Provider	Reason	Other Reason	Termination Date
<input checked="" type="radio"/> YES	765540530	R	J	A S	-- Select a reason -- Uncooperative Parent School was Uncooperative Student No Longer Attending This School Student Cannot be Located Provider no Longer Available Provider Assigned in Error Student Refuses to Attend Session Extended Student Absence (> 20 school days) Mandate Generated in Error Other		MM/DD/YYYY

4. Click **OK**.

Note: A new awaiting line will appear on the grid with *Assignment Status* of *Awaiting Contract Agency Provider*.



Note: A message will appear indicating that provider was terminated.

Provider was terminated.

Recording First Attend

Note: The *Assignment Status* must be *Awaiting First Attend* or *Reason for Delay Needed* for this scenario

1. From the *Awaiting Contract Agency* sub-tab, place a checkmark on the mandate(s) and click **First Attend**.

Select	Student NYCID	Last Name	First Name	Provider	Mandate Status	Assignment Status
<input checked="" type="checkbox"/>	303629274	E	A	M D	Fully Assigned	Awaiting First Attend

Note: If the mandate is not first attended within 5 days, the *Assignment Status* will change to *Reason for Delay Needed* and the provider must enter a *First Attend Delay Reason*. This will update the *Assignment Status* back to *Awaiting First Attend*.

2. Enter a **First Attend** date.
3. Click **OK**.

First Attend Confirmation

⚠ 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 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
303629274	E	A	A S	9/1/2023		<input type="text"/>	-- Select a reason --	

Note: The mandate is now under the **Receiving Contract Agency** sub-tab with an *Assignment Status* of *Receiving*.

Receiving Contract Agency Provider [3] Receiving IA [0]

Student NYCID : Student First Name : Student Last Name :

Admin DBN : Auth Admin DBN : Auth Phys District : -- Select --

Phys Site Bldg Code : Auth Site Bldg Code : Auth Phys Borough : -- Select --

BFSC : -- Select -- CSE : -- Select -- Grade : Preschool

Service Type : -- Select -- Group/Indiv : -- Select -- Group Size : -- Select --

Frequency : Duration : Mandate Status : -- Select --

Provider : Agency : First Attend Discrepancy : -- Select --

Reset Search

Terminate First Attend

Select	Student NYCID	Last Name	First Name	Mandate Status	Assignment Status
<input type="checkbox"/>	303629274	E	A	Fully Assigned	Receiving

Recording a First Attend Discrepancy

When a first attend discrepancy exists, for example, the DOE provider first serviced the student prior to the *First Attend* date or more than 5 days after being assigned to the mandate, a reason needs to be entered.

Follow the steps below If a *Reason For Discrepancy* needs to be entered; otherwise, proceed directly to **step 3**.

1. Select a reason from the *Reason For Discrepancy* dropdown list.
2. If **Other** was selected, enter a reason in the *Other Reason* pop-up window, and click **OK**.

First Attend Confirmation

! 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 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
303629274	E	A	A S	9/1/2023		03/11/2024	Other	

Other Reason

Please type in the reason for first attend discrepancy:

OK

Cancel OK

3. Click **OK** located in the bottom right of the *First Attend Confirmation* window.

First Attend Confirmation ✕

 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 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
303629274	E	A	A S	9/1/2023		03/11/2024	Other	sample

3
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