Related Service Authorization (RSA) Process

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Introduction

This training guide provides step-by-step instructions on the Related Service Authorization (RSA) process, which includes:

- Changing the assignment status of the student mandate to Awaiting RSA
- Issuing the Related Service Individual Authorization (RSA) package
- Deciding to approve, disapprove, or revoke the RSA.

Note: The RSA package also includes the TRV-1 Form: Parent/Guardian Transportation Reimbursement Voucher for Special Education Services. This is to be completed (when applicable) by the child’s parent/guardian and independent provider; and returned to the address indicated on the form.
Changing the Mandate Assignment Status to Awaiting RSA

1. In Provider Assignment, place a checkmark on the row(s) on the mandate grid.

2. From the Select Assignment Status Here dropdown menu, select Awaiting RSA.

3. Click Change Assignment Status.

4. Click OK to confirm.

Note: A green banner appears at the top of page to confirm the mandate has been updated. The mandate will now appear on the Awaiting RSA sub-tab.

Issuing the Related Service Individual Authorization (RSA) Package

Note: Mandates from the current IEP will be identifiable on the PA grid with icon (C). Mandates from the previous IEP will be identifiable on the PA grid with icon (P). Be sure to select the appropriate mandate row for accuracy.
Follow the steps below to issue a RSA:

- RSA-1 Form: Related Service Individual Authorization
- RSA-2 Form: Parent/Guardian and Individual Provider/Agency Service Agreement
- TRV-1 Form: Parent/Guardian Transportation Reimbursement Voucher for Special Education Services
- Mail To

1. In Provider Assignment, click to navigate to the **Awaiting RSA** sub-tab.

2. Place a **checkmark** on the row(s) on the grid.

3. Click **Issue RSA**. The SESIS User Contact Look-up window will open.

   **Note:** The assignment status must be **Awaiting RSA**.

4. Place a **checkmark** next to the DOE contact in the list or search for the DOE staff contact by entering their social security number, last name, or first name.

   **Note:** When using the staff lookup feature, click **Search** before clicking **Select**.

5. Click **Select**.
**Important:** An option to select the new MG RSA-1 document will populate on the confirmation screen when issuing RSAs. Select MG RSA-1 only if you are Borough/Citywide Office (B/CO) related service transmittal staff arranging services for students attending Bronx schools from D7-12, D75 and D79. This document is updated with guidance for those parents on how and who to contact for additional assistance.

**Note:** If the student’s Admin DBN represents a DOE managed school in Bronx excluding Home and Hospital instruction, the MG RSA-1 document will be automatically selected. The message below will appear on the screen if you change the selection to RSA-1:

“The MG RSA 1 should be sent to all Bronx families with children attending DOE schools (D7-12, D75 and D79) with the following exceptions: students with consecutive absences of more than 20 days and/or overall attendance below 25%; students who currently attend a detention or institutional setting, and/or students who have been admitted to home/hospital instruction. Students in these exception categories should receive the standard RSA-1”

6. Click **Confirm** to create the RSA package.

**Note:** A message appears in the top section of the page indicating Documents successfully created.
**Note:** The following steps will show you how to complete one RSA at a time. For batch processing, please follow steps under [Batch RSA Process](#) section of this guide.

7. Click the **Document** icon to access the RSA forms.

**Note:** The assignment status changes to RSA Created.

8. Click the blue **RSA Package** link to access the RSA Package.

**Note:** The applicable form will be generated based on the user’s selection. For example, the MG RSA-1 *(Bronx Only)* letter will generate instead of the RSA-1 if it was selected for students in a Bronx location.

The MG RSA-1 will display the following additional information:

*The DOE will continue to make every effort to provide this service to your child. As part of these efforts, the DOE will work with you to obtain an independent provider. The liaison listed on the Related Services Authorization form (RSA) will reach out within ten school days to offer assistance. Upon your request, they will:

- call providers to determine their availability; and
- provide guidance and/or assistance on completing a transportation voucher

In addition, the liaison will reach out to you periodically until your child’s related services are in place.

Once a provider is identified and has started providing services to your child, you may request make-up services by contacting your RSA Liaison and/or emailing BronxMakeups@schools.nyc.gov.

Finally, you may request additional assistance and/or information regarding the RSA process, including how to make a complaint, by contacting your RSA Liaison, calling 311, or emailing relatedservices@schools.nyc.gov.

For more information on these supports, see the Procedural Safeguards Notice on our website at [https://www.schools.nyc.gov/learning/special-education/help/your-rights](https://www.schools.nyc.gov/learning/special-education/help/your-rights).*
9. The RSA-1 Form: Related Service Individual Authorization opens. Make any updates to the form, then click **Save**.

![RSA-1 Form](image)

**Note:** A message appears in the top section of the page indicating the form was saved.

*Saved Successfully!!*

10. Click **Finalize**.

11. Click **OK** to confirm the change of status.
Note: A status message displays confirming the document was set to final.

12. From the Document Packages form, click the RSA-2 Form: Parent/Guardian and Individual Provider/Agency Service Agreement subtab.

13. Select where the services are expected to be provided and complete any edits to the RSA-2 form.

14. Click Save.

Note: A message appears in the top section of the page indicating the form was saved.
15. Click **Finalize**.

16. Click **OK** to confirm the status change.

**Note:** A message displays confirming the document was set to final.

![Confirmation message](image)

17. From the Document Packages form, click the **Mail To** subtab.

18. Enter/verify the mailing address.

19. Click **Save**.

**Note:** A message appears in the top section of the page indicating the form was saved.

![Saved Successfully message](image)
20. Click **Print** to mail the RSA-1, RSA-2, TRV-1 forms to the parent.

**Note:** The TRV-1 Form is the Parent/Guardian Transportation Reimbursement Voucher for Special Education Services. This is to be completed (when applicable) by the parent/guardian and independent provider; and returned to the address indicated on the form.

21. **Check the boxes** to print the following forms: RSA-1 Form: Related Service Individual Authorization, RSA-2 Form: Parent/Guardian and Individual Provider/Agency Service Agreement, TRV-1 Form, and Mail To.

22. Click **OK** to print selected forms.

23. Click **Return to Document List**.

![Image of the Print Selected Forms dialog box with RSA forms selected and Mail To address entered]

**Note:** If a confirmation error is shown, click **OK** to continue.

![Image of the Confirmation dialog box with message indicating changes will not be saved]

24. Click **X** to close the Document Packages window and return to the PA grid.

![Image of the Document Packages for G Z (700-067-943) window with RSA packages listed and RSA-1 version highlighted]

After all three of the initial RSA documents (RSA-1 or MG RSA-1, RSA-2, TRV-1, and Mail To) are finalized, the Inbox icon displays beside the student mandate row. This Inbox icon indicates the row is awaiting the receipt of the RSA-2 form from the parent.
**Note:** The Assignment Status for the mandate changes to RSA Issued / Awaiting Independent Provider.

![Assignment Status Screen](image)

**Note:** When Attending DBNs change for a student 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. If confirmed, the assignment status will change to RSA Created. If the Provider rejects the assignment, the mandate assignment changes back to Awaiting RSA.

### Faxing/Scanning the RSA Forms into SESIS

**Follow the steps to fax or scan the following RSA-2 forms into SESIS when the:**

- RSA-2 form is received from the parent/guardian
- RSA is approved, fax the RSA-2 Individual Provider Approval letter
- RSA is disapproved, fax the RSA Correction Cover Letter
- RSA is revoked, fax the RSA the Letter to Parent/Guardian Withdrawing the RSA.

1. Navigate to the student’s documents in SESIS and click the **Create New Document** dropdown menu.

2. From the Create New Document dropdown, select **Documents Related to Provider Assignment**.

![Create New Document](image)
3. Click **Go**.

4. Enter a **Label/Comment** for the document.

5. Click **New**.

6. Click **Print**.

7. Select **Fax Coversheet**.
8. From the Category dropdown menu select, Documents Related to Provider Assignment.

9. From the Form dropdown menu, select RSA.

10. Enter Date Received.

11. Select Service Type.

12. Click Print.

13. Fax or scan in the form using the fax cover sheet you printed. Upon verification that the document is attached in SESIS, click Set Document.

14. Click Status from Draft to Final to change the status of the document.
15. Click **Accept**.

![Set Document Status: Documents Related to Provider Assignment for Rinaldo Casillas (1901161)](image)

16. Click **OK** to confirm the status change.

![Change status of document to final?](image)

**Note:** A status change message displays confirming the document was set to final.

![Document status set to final.](image)

**Making a Decision on the RSA**

Follow the step-by-step instructions to make a decision on the RSA package.

1. In Provider Assignment navigate to the **Awaiting RSA** sub-tab.

![Awaiting RSA](image)

2. Search for the student’s mandate and click the **Inbox** icon to open the RSA Approve/Disapprove popup window.

**Note:** The assignment status for the student mandate is **RSA Issued / Awaiting Independent Provider**.
3. Enter the **Independent Provider's 9-digit SSN** from the RSA-2 form. The provider lookup may be used to retrieve the Independent Provider's social security number.

4. Click on the **Retrieve** button to retrieve the Independent Provider.

**Note:** Upon clicking **Retrieve**, one of the following outcomes occurs:

- If the Provider is not found, the Provider Name area will contain: **Provider Not Found**
- If the Provider is not authorized, the Provider Name area will contain: **Provider Name (Not Authorized Provider)**
- If the Provider is found and authorized, the Provider Name area will contain: **Provider Name (Authorized)**

5. Enter the Independent Agency's 9-digit Tax ID, when applicable.

6. Enter **Provider Authorization Date** field.

7. Change the **Portion of Frequency**, when applicable.

8. Select the **Location** where the service will take place.

**Note:** For guidance on approving, disapproving, or revoking the RSA, continue reading this guide.
Approving RSA

Upon approval of the RSA package, navigate to the student’s documents in SESIS to fax the RSA-2 Individual Provider Approval Letter into SESIS. Refer to the Faxing the RSA Forms into SESIS section in this training guide for step-by-step guidance. Print and mail the RSA-2 Individual Provider Approval Letter to the independent provider.

When a mandate is approved:

- The assignment status of the mandate changes to Awaiting First Attend
- For most cases, the student is added to the Independent Provider’s caseload in SESIS overnight
  - For cases when the student is not automatically added to the Independent Provider’s caseload in SESIS, contact an authorized DOE representative to request to have the student manually added to the Independent Provider’s caseload
- The selected frequency will be reflected on the mandate row
  - If the mandate frequency is not for the full mandate, the system will automatically split the mandate and add a new assignment row for the remaining frequency with an Assignment Status of Awaiting RSA
- The RSA-2 Individual Provider Approval Letter is added to the RSA Document Manager/Packet

1. In Provider Assignment, navigate to the Awaiting RSA sub-tab.
2. Place a checkmark on the row(s) on the grid.
3. Click the Inbox icon.

![Image of Provider Assignment interface]

Note: Refer to the Making a Decision on the RSA (An Overview) section in this training guide for steps to complete the Approve/Disapprove RSA Independent Provider form.

4. Click Approve.
5. Click **OK** to continue with the approval process.

   ![Image of OK button]

**Note:** Upon approval, a green informational banner box displays at the top of the page. Follow the prompts. Refer to the [Faxing the RSA Forms into SESIS](#) section in this training guide for step-by-step guidance to fax the RSA-2 Individual Provider Approval Letter into SESIS.

6. Place a checkmark on the mandate row(s) on the grid.

7. Click the **Document** icon.

   **Note:** The assignment status is changed to **Awaiting First Attend**.

8. Click on the blue link to access the RSA-2 Individual Provider Approval letter.

9. From the Document Packages form, click the **RSA-2 Form Individual Provider Approval Letter** tab to open the document.
10. Make edits to the form, then click **Save**.

![Save button]

**Note:** A message will appear in the top section of the page indicating the form was saved.

**Saved Successfully!!**

11. Click **Finalize**.

12. Click **OK** to confirm the status change.

**Note:** A message will appear in the top section of the page indicating the document was set to final.

**Document status set to final.**

13. **Print and mail** the RSA-2 Form *Individual Provider Approval Letter* to the independent provider.

**Note:** Refer to the [Faxing the RSA Forms into SESIS](#) section in this training guide for step-by-step guidance to fax the RSA-2 *Individual Provider Approval Letter* into SESIS.

14. Click Return to Document List.
15. Click X to close the Document Packages window to return to the PA grid.

Disapproving the RSA

An RSA package may be disapproved for several reasons; for example, the RSA is missing information on the form. Best practice: Reach out to the Independent Provider to obtain the additional information instead of disapproving the RSA. Refer to the Faxing the RSA Forms into SESIS section in this training guide for step-by-step guidance to fax the RSA Correction Cover Letter into SESIS. Print and mail the RSA Correction Cover Letter to the parent.

When a mandate is disapproved:

- The assignment status of the mandate changes to RSA Provider Disapproved (USER)
  - A new assignment row in Awaiting RSA status is generated so that a subsequent assignment can be made
- The RSA Correction Cover Letter is added to the RSA Document Manager/Package

1. In Provider Assignment, navigate to the Awaiting RSA sub-tab.
2. Place a checkmark on the row(s) on the grid.
3. Click the Inbox icon.

Note: Refer to the Making a Decision on the RSA (An Overview) section in this training guide for steps to complete the Approve/Disapprove RSA Independent Provider form.

4. Click Disapprove.
5. Click **OK** to select a reason.

6. Select **Reason For Disapproval** from the drop-down menu.

7. Click **Disapprove**.

8. Click OK to disapprove the RSA.

**Note:** Upon disapproval, the assignment status is changed to RSA Provider Disapproved (USER). A new assignment row in **Awaiting RSA** status is generated so that a subsequent assignment can be made. A green informational banner box displays at the top of the page. Follow the prompts. Refer to the [Faxing the RSA Forms into SESIS](#) section in this training guide for step-by-step guidance to fax the RSA Correction Cover Letter into SESIS.

**Note:** If viewing a student’s assignment row through a search, changing the assignment status may cause the student to no longer appear in your selected view. To relocate the assignment row, modify search criteria to reflect an assignment status of RSA Provider Disapproved (USER).
9. From the Provider Assignment grid, locate the student mandate and place a checkmark on the assignment row(s) on the grid.

10. Click the Document icon.

11. Click on the blue link to access the RSA Package.

12. From the Document Packages form, click the RSA Correction Cover Letter tab to open the document.

13. Select the reason(s) for returning the RSA-2 form, if not pre-checked.

14. Click Save.

Note: A message will appear in the top section of the page indicating the form was saved.

15. Click Finalize.
16. Click **OK** to confirm the status change.

![Confirmation](confirmation.png)

**Note:** A message displays confirming the document was set to final.

![Document status set to final.](final-status.png)

17. **Print** and **mail** the RSA-2 Correction Cover Letter along with the RSA-2 form that the parent returned.

**Note:** Refer to the [Faxing the RSA Forms into SESIS](#) guidance to fax the RSA Correction Cover Letter into SESIS.

18. Click **Return to Document List**.

19. Click **X** to close the Document Packages window to return to the PA grid.

![Document Packages for G Z (700-067-943)](document-packages.png)

**Revoking the RSA**

An RSA may be revoked for many reasons, for example, a DOE provider is now available to provide the service. Refer to the [Faxing the RSA Forms into SESIS](#) section in this training guide for step-by-step guidance for faxing the Letter to Parent/Guardian Withdrawing the RSA form into SESIS. Print and mail the Letter to Parent/Guardian Withdrawing the RSA to the parent.

**When a mandate is revoked:**

- The assignment status of the mandate changes to RSA Revoked
- A new assignment row in Awaiting RSA status is generated so that a subsequent assignment can be made
- The Letter to Parent/Guardian Withdrawing the RSA is added to the RSA Document Manager

1. In Provider Assignment, navigate to the Awaiting RSA sub-tab.

2. Place a **checkmark** on the row(s) on the grid.

3. Click the **Inbox** icon.

![Image of Provider Assignment interface](image)

**Note:** Refer to the Making a Decision on the RSA (An Overview) section in this training guide for steps to complete the Approve/Disapprove RSA Independent Provider form.

4. Click **Revoke**.

5. Click **OK** to select a reason.

6. Select a **Reason For Revocation** from the drop down menu.
7. Click **Revoke**.

8. Click **OK** to revoke the RSA.

**Note:** Upon revocation, a green informational banner box displays at the top of the page. Follow the prompts. Refer to the *Faxing the RSA Forms into SESIS* section in this training guide for step-by-step guidance to fax the *Letter to Parent/Guardian Withdrawing the RSA* into SESIS.

9. From the Provider Assignment grid, locate the student mandate and place a checkmark on the row(s) on the grid.

**Note:** The assignment status is changed to RSA Revoked. A new assignment row in *Awaiting RSA* status is generated so that a subsequent assignment can be made.

10. Click the **Document** icon.
11. Click on the blue **RSA Package** link to access the RSA Package.

12. From the *Document Packages* form, click the **Letter to Parent/Guardian Withdrawing the RSA** tab to open the document.

13. Enter the service start date and make additional edits as appropriate.

14. Click **Save**.

   **Note:** A message will appear in the top section of the page indicating the form was saved.

15. Click **Finalize**.

16. Click **OK** to confirm the status change.

   **Note:** A message displays confirming the document was set to final.

17. **Print** and **mail** the **RSA-2 Correction Cover Letter** along with the RSA-2 form that the parent returned.

   **Note:** Refer to the [Faxing the RSA Forms into SESIS](#) guidance to fax the **Letter to Parent/Guardian Withdrawing the RSA** into SESIS.

18. Click **Return to Document List**.

   **Note:** Image for steps above on next page.
19. Click X to close the Document Packages window to return to the PA grid.

**Batch RSA Process**

The ability to save, print, finalize, approve, disapprove, or revoke multiple RSA packages in one single batch process is also available for assignment rows.

**Note:** Selected batch must contain assignment rows that are all in the same assignment status. Attempting to batch process RSAs that are in different statuses will result in the pop-up message below.
1. Place a **checkmark** on the assignment rows on the grid.

**Note:** You have a limit of fifty (50) rows to choose at a time.

2. Click Batch RSA.

![Batch RSA](image)

**Note:** The Batch RSAs - RSA Created window will open. Since the selected rows are still in draft package mode, the ability to update the DOE contact information and indicate the location of the service is available at the top of the screen.

![Batch RSAs - RSA Created](image)

3. Click **DOE Contact** to edit the DOE contact person on the RSA forms.

![DOE Contact](image)
4. Select **Service to Be Provided At:** from the dropdown menu.

5. Click **APPLY ALL** button to apply the changes to all rows in selection.

**Note:** Always use **APPLY ALL** first, before making any changes to the outliers in the selected group; if changes are made to the outliers before using **APPLY ALL**, the changes will be overridden by the **APPLY ALL** function, and therefore lost.

Additionally, any one of the rows in the selection can be updated differently than the rest by clicking the + accordion feature beside the desired row.

**Note:** To facilitate the ability to review details of RSA cases being processed in batch, click the accordion button in the upper-left hand corner of window.

**Collapsed:**

**Expanded:**
**Note:** Rows in assignment status of RSA Issued/ Awaiting Independent Provider have the fields below available to edit through batch processing:

- Provider Authorization Date
- Portion of Frequency
- Service to Be Provided At

### Save, Print, Finalize Batch Process

7. At the bottom of the window, you have the option to save RSAs as draft, final or print.

8. When printing the RSAs, you have the option to print the RSA packages as One combined PDF or Separate PDFs.

9. **Check the appropriate box** for each form to print.

10. Click **OK** or **CANCEL** as necessary.
**Note:** The file download process varies depending on the browser. For example, when using a Chrome browser, you will be prompted to **Allow** or **Block** the downloading of multiple files.

![Download multiple files](image)

**Note:** When using a Chrome browser, check your system tray for the downloaded file(s). Click **Show all** to display files.

If the PDFs are printed separately, each individual file name will include the Student ID and the translated language (if the Parent Preferred Written Language is one of the 9 high incidence DOE languages). A complete English copy of the form(s) will be generated, directly followed by a complete foreign language translation in the same file.

![Form_555566655_Undo](image)

If the Parent Preferred Written Language is another language (other than the 9 high incidence DOE languages), the file name will indicate *English*. If available, the English language copies will contain a foreign language banner in the heading, advising the recipient to seek assistance from their language community, if needed.

If the Parent Preferred Written Language is English, the file name will indicate *English*, and only an English-language copy is included.

![Form_555566655_English](image)

**Note:** If the PDFs are printed as one combined file, the file name will indicate the number of students included in the combined PDF and the date and time generated. In this example, the number 35 represents 35 students, not 35 RSAs. If there are students with multiple RSAs in this selection (perhaps totaling 39 RSAs overall), the number remains at 35, representing 35 unique students in the PDF.

![35_BatchRSA_Date_09102020_Time_145900](image)
Revoke or Disapprove Batch Process

1. Place a **checkmark** on the assignment rows on the grid.

2. Click **Batch RSA**. The Batch RSAs - RSA Issued / Awaiting Independent Provider window will open.

   ![Batch RSA Grid](image)

   **Note:** You have a limit of 50 rows to choose at a time.

3. To **Revoke** or **Disapprove** click on the appropriate button.

   ![Revoke/Disapprove Buttons](image)

4. After clicking on **Revoke** or **Disapprove**, the Revoke/Disapprove Reason dropdown menu displays. If revoking or disapproving, you must select a **Revoke/Disapprove Reason**.

   ![Revoke/Disapprove Reason Dropdown](image)
5. After selecting the Revoke/Disapprove Reason, you must click Revoke or Disapprove, again. 

**Note:** You can print after the revoke or disapprove action.

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**Note:** A guided message displays to confirm your action and next steps.

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### Approve Batch Process

1. Place a **checkmark** on the assignment rows on the grid.

2. Click **Batch RSA.** The Batch RSAs - RSA Issued / Awaiting Independent Provider window will open.

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**Note:** You have a limit of 50 rows to choose at a time. The recommended rows to select are 10.
3. To Approve click **Magnifying Glass** to search for a provider or enter the social security number for the provider and click **Retrieve**. Enter the Independent Agency Tax ID as appropriate.

4. Select the **Provider Authorization Date**.

5. Select the **Service to Be Provided At**.

6. Check the **Assign Full Frequency of the Assignment Row** box, as appropriate.  

   **Note:** If **Assign Full Frequency** is checked and **APPLY ALL** is used, all cases in the selection will be approved for the full frequency of the respective mandates. If a user needs to indicate only a portion of the frequency on any specific row(s) in the group for approval, this checkbox must be unchecked.

7. Click **Apply All**.

8. Click **Approve**. (You can print after approve action.)

   ![Diagram showing steps 3 to 8]

   **Note:** A guided message displays to confirm your action and next steps.

   ```
   RSA case successfully Approved.
   ```

   At this time you should:
   - visit the student’s main Documents page in SEIS and print the RSA-2 Fax Cover Sheet; fax the RSA-2 document into SEIS.
   - visit the student’s Provider Assignment Documents page to view, edit, save, finalize, and print the RSA-2 Individual Provider Approval Letter. Mail it to the Independent Provider.

   **RSA Communication Log**

   You can record all communications related to an RSA package in the **RSA Communication log**.

   1. Click the **document icon** beside the row. The **Document Packages for Student** screen will open.

   ![Document icon with RSA case number]
2. Click the **RSA Communication log** tab.

![RSA Communication log tab](image)

3. Enter **Date of Contact** by clicking on the blank textbox and selecting from pop-up calendar.

![Date of Contact calendar](image)

**Note:** *Date of Contact and Time of Contact may not be future dates/times.*

4. Click on the clock icon to select the **Time of Contact**.

![Time of Contact](image)

5. Select a note(s) from the **Notes** dropdown menu.

**Note:** Scroll up or down on the side to view more options.
6. Enter any additional notes you may need to document.

**Note:** When recording a log entry, a user may select one of the available notes and/or type in additional notes. Both are not required simultaneously, but one or the other must be entered prior to saving.

7. Click **Save**.

**Note:** Once a log entry is saved, it cannot be edited.

8. A notification at the top of the screen will appear verifying that the log was saved successfully.

**Saved Successfully!!**

9. Download **RSA Communication log** to Excel by clicking to **Excel Export**.

10. The Excel spreadsheet will download onto your system tray. **Click to open.**

**Note:** The RSA Communication log will open in Excel spreadsheet.