



## Fax/Scan Guidance Blended and Remote Learning (CSE/School)

### Introduction

The chart below outlines the interim processes to use **when faxing and scanning external documents into SESIS is not available to school/CSE staff**. Follow the guidance related to the specific process to continue your work in SESIS, as needed. During blended and remote learning, roles and responsibilities remain the same.

**Note:** To view resources linked in this guide, first [log in to the InfoHub](#) with your DOE Outlook Credentials.

**Fax bypass:** Some documents in SESIS include a "Fax bypass" function, which allows IEP teams to enter the required information from external documents into SESIS and proceed with special education processes without faxing or scanning documents into the system.

**Designated workaround:** When Fax bypass is not available, use the designated workaround specified in the chart below.

**Fax/Scan:** For documents requiring faxing to move forward with a process but do not have Fax bypass functionality or a designated workaround, every attempt must be made to fax/scan SESIS documents using the school fax machine or ATS scanner. The fax email inbox may be used **only** when the entire IEP team has approved medical accommodations and/or is working remotely. Immediately send external documents to the applicable email inbox: For D.1-32, use [publicschoolfaxrequest@schools.nyc.gov](mailto:publicschoolfaxrequest@schools.nyc.gov) and for CSEs 1-10, use [csefaxrequest@schools.nyc.gov](mailto:csefaxrequest@schools.nyc.gov). When forwarding a fax request, be sure to include the **student's name, NYCID #, DOB, public school DBN or CSE**, and a **PDF version of the corresponding Fax Coversheet**.

Process Impacted	Process Guidance	Fax Guidance
<p><b>Initial Referral: Completing an Initial Referral from a Parent</b></p>	<ul style="list-style-type: none"> <li>Principals will receive referrals from parents</li> <li><b>Create the Initial Referral</b> document in SESIS, and complete <i>Notice of Referral: Initial</i> and the <i>Procedural Safeguards Notice</i></li> <li><b>Upload the Parent Referral</b> into the <i>Initial Referral</i> document: Click <i>Navigate To</i>, select <i>File Attachments</i>, click <i>Attach files</i> and upload the Parent Referral</li> <li>Verify the parent referral is attached</li> <li><b>Complete the Fax bypass:</b> <i>Initial Referral Parent</i> section</li> <li><b>Finalize</b> the <i>Initial Referral</i> document</li> <li><b>Print</b> (Save as PDF) and send the <i>Notice of Referral: Initial</i> to the parent</li> </ul> <p><b>SEGIS Resources:</b> <a href="#">Referral for Special Education Eligibility</a></p>	<p><b>Fax bypass:</b> <i>Initial Referral Parent</i></p>

Process Impacted	Process Guidance	Fax Guidance
<b>Reevaluation Referral: Completing a Request for Reevaluation from Parent or Other Source [e.g., Physician or Judicial Officer]</b>	<ul style="list-style-type: none"> <li>• <b>Create</b> the <b>Request for Reevaluation</b> document, and select <i>Parent or Other Source</i> as the source of Referral</li> <li>• <b>Upload the Referral:</b> Click <i>Navigate To</i>, select <i>File Attachments</i>, click <i>Attach files</i> and upload the Referral</li> <li>• Verify the Referral is attached</li> <li>• <b>Complete the Fax bypass:</b> <i>Req. for Reeval-Parent/External</i> section</li> <li>• Reevaluation referrals from external sources other than the parent need to be set to review and approved/disapproved by the Principal/CSE Chairperson</li> <li>• <b>Finalize</b> the <i>Request for Reevaluation</i> document</li> <li>• If approved, create and complete the <i>PWN – Reevaluation</i> to send to the parent</li> </ul> <p><b>SE SIS Resources:</b> <a href="#">Referral for Special Education Eligibility</a></p>	<b>Fax bypass:</b> <i>Req. for Reeval-Parent/External</i>
<b>Additional Reevaluation Referral: Request for Additional Reevaluation from Parent or Other Source [e.g., Physician or Judicial Officer]</b>	<ul style="list-style-type: none"> <li>• <b>Create</b> the <b>Request for Additional Reevaluation</b> document</li> <li>• <b>Check the Referral Source:</b> <i>Parent or Other Source [e.g., Physician or Judicial Officer]</i></li> <li>• <b>Fax/Scan:</b> <i>Request for Additional Reevaluation – Parent/External</i></li> <li>• After the Referral appears as an attachment, set the <i>Request for Additional Reevaluation</i> status from <b>draft</b> to <b>review</b></li> <li>• Principal/CSE Chairperson: review, approve/disapprove and <b>finalize</b> the <i>Request for Reevaluation</i></li> <li>• If approved, create the <i>PWN – Additional Reevaluation</i></li> </ul> <p><b>SE SIS Resources:</b> <a href="#">Referral for Special Education Eligibility</a></p>	<b>Fax/Scan:</b> <i>Req for Additional Reeval -Parent/External</i>
<b>PWN – Additional Reevaluation: Agreement for Additional Reevaluation (when the parent is not the source)</b>	<ul style="list-style-type: none"> <li>• If the <i>Request for Additional Reevaluation</i> was approved, <b>Create and complete PWN – Additional Reevaluation</b></li> <li>• <b>Complete</b> the <i>Agreement for Additional Reevaluation</i>, the <i>Consent for Additional Assessments</i> (if applicable) for Reevaluation, and the <i>Procedural Safeguards Notice</i> sections</li> <li>• <b>Print</b> (Save as PDF) and send the <i>Agreement for Additional Reevaluation and Consent for Additional Assessments (if applicable)</i> to the parent to sign and return</li> <li>• <b>Fax/Scan</b> signed <i>Agreement for Additional Reevaluation</i></li> </ul> <p><b>SE SIS Resources:</b> <a href="#">Referral for Special Education Eligibility</a></p>	<b>Fax/Scan:</b> <i>Agreement for Additional Reevaluation</i>

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<p><b>Mandated Three Year Reevaluation: Request for Waiver of Mandated Three-Year Reevaluation</b></p>	<ul style="list-style-type: none"> <li>• <b>Create</b> the <b>Mandated Three Year Reevaluation</b> document, add <i>Request for Waiver of Mandated Three Year Reevaluation</i>, and uncheck <i>PWN - Mandated Three Year Reevaluation</i></li> <li>• <b>Complete</b> and <b>finalize</b> the document</li> <li>• Send to the parent</li> <li>• After consent* is returned, <b>Fax/Scan</b> into SESIS</li> </ul> <p><b>SEIS Resources:</b> <a href="#">Referral for Special Education Eligibility</a></p>	<p><b>Fax/Scan:</b> <i>Request for Waiver of Mandated Three Year Reevaluation Consent*</i></p> <p>*PDF file of the email stating their permission to waive Mandated Three-Year Reevaluation</p>
<p><b>Reevaluation: Parent request to conduct additional assessments</b> for a Reevaluation, Additional Reevaluation or Mandated Three Year Reevaluation</p>	<ul style="list-style-type: none"> <li>• Parent requests additional assessments after the <i>PWN – Reevaluation</i>, <i>PWN – Additional Reevaluation</i>, or <i>Mandated Three Year Reevaluation</i> was finalized</li> <li>• <b>Fax/Scan</b> request from the parent to conduct additional assessments into the respective finalized <i>PWN – Reevaluation</i>, <i>PWN – Additional Reevaluation</i>, or <i>Mandated Three Year Reevaluation</i></li> <li>• After the parent request appears as an attachment, create and complete the <i>PWN – Parent Request for Additional Assessments</i> document</li> </ul> <p><b>Note:</b> You will not be able to create the <i>PWN – Parent Request for Additional Assessments</i> document until the parent request appears as an attachment to the finalized <i>PWN – Reevaluation</i>, <i>PWN – Additional Reevaluation</i>, or <i>Mandated Three Year Reevaluation</i>.</p> <p><b>SEIS Resources:</b> <a href="#">Referral for Special Education Eligibility</a></p>	<p><b>Fax/Scan:</b> <i>Parental Request to Conduct Additional Assessments</i></p>
<p><b>Reevaluation: Consent for Additional Assessments (Assessments Needed)</b> for a Reevaluation, Additional Reevaluation or Mandated Three Year Reevaluation, or <i>PWN - Parent Request for Additional Assessment(s)</i> (continued on next page)</p>	<ul style="list-style-type: none"> <li>• Assessments Needed are listed on the respective finalized <i>PWN – Reevaluation</i>, <i>PWN – Additional Reevaluation</i>, or <i>Mandated Three Year Reevaluation</i>, or <i>PWN - Parent Request for Additional Assessment(s)</i>, which is sent to the parent with the <i>Consent for Additional Assessments</i> and the <i>Procedural Safeguards Notice</i></li> <li>• <b>Designated workaround:</b> After the parent returns consent for assessments, log two unique outreach attempts in the Events Log linked to the respective <i>PWN – Reevaluation</i>, <i>PWN – Additional Reevaluation</i>, <i>Mandated Three Year Reevaluation</i>, or <i>PWN - Parent Request for Additional Assessment(s)</i> <ul style="list-style-type: none"> <li>○ Event Description: write “Consent for additional assessments workaround”</li> <li>○ Include the <i>Date and Time of Event</i></li> <li>○ Log Type = <i>Mail</i> or <i>Phone Call</i></li> </ul> </li> </ul>	<p><b>Designated workaround:</b> <i>Record two outreach attempts in Event Log</i></p>

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	<ul style="list-style-type: none"> <li>• <b>Create</b> the <i>Assessment Planning</i> document, on which “Two outreach attempts were recorded” will appear under the <i>Date of consent for new testing</i>, and you will be able to proceed with evaluations</li> </ul> <p><b>SEIS Resources:</b> <a href="#">Referral for Special Education Eligibility</a>; <a href="#">SEIS Blended and Remote Learning Resources</a></p>	
<p><b>Social History Package: (when the parent returns consent for the initial evaluation and also, for CSEs, HLIS when applicable)</b></p>	<ul style="list-style-type: none"> <li>• <b>Create</b> the <i>Social History Package</i> and print the <i>Consent for Initial Evaluation</i> to provide to the parent</li> <li>• After signed consent is obtained, <b>complete</b> the <i>Social History Package</i></li> <li>• <b>Upload</b> the signed consent: Click <i>Navigate To</i>, select <i>File Attachments</i>, click <i>Attach files</i> and upload the signed consent</li> <li>• Verify the consent is attached</li> <li>• <b>Complete the Fax bypass:</b> <i>Consent for Initial Evaluation</i> section</li> <li>• For CSE’s, if the <i>Home Language Identification Survey (HLIS)</i> has not been completed, upload the HLIS as a <i>File Attachment</i> and complete the <i>Fax Bypass: Home Lang. Identification Survey</i> section and <b>finalize</b> the <i>Social History Package</i></li> </ul> <p><b>SEIS Resources:</b> <a href="#">Referral for Special Education Eligibility</a></p>	<p><b>Fax bypass:</b> <i>Consent for Initial Evaluation</i></p> <p><b>Fax bypass:</b> <i>Home Lang. Identification Survey</i> (if applicable)</p>
<p><b>Initial Evaluation or Reevaluation: Evaluation(s) Provided by Parent/Prior Assessment</b></p>	<ul style="list-style-type: none"> <li>• <b>Fax/Scan:</b> External evaluation(s) provided by a parent/prior assessment must be faxed into the corresponding evaluation template in SEIS</li> </ul> <p><b>SEIS Resources:</b> <a href="#">Evaluation</a></p>	<p><b>Fax/Scan:</b> <i>Evaluation(s)* Provided by Parent/Prior Assessment</i></p> <p>*PDF file version of the evaluation</p>
<p><b>IEP: Fax/Scan Attendance Page</b> (continued on next page)</p>	<ul style="list-style-type: none"> <li>• <b>Designated workaround:</b> The following documents can be finalized without faxing or scanning an attendance page into SEIS <ul style="list-style-type: none"> <li>○ Individualized Education Program (IEP)</li> <li>○ Individualized Education Services Plan (IESP)</li> <li>○ Services Plan (SP)</li> <li>○ Declassification from Special Education Services</li> <li>○ Ineligible for Special Education Services</li> </ul> </li> <li>• <b>Complete the attendance page</b> in the IEP (check <i>Participated by telephone</i>)</li> <li>• <b>Finalize</b> the IEP</li> </ul>	<p><b>Designated workaround:</b> Finalize IEP</p>

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	<p><b>Note:</b> When all participants participate by telephone, it is unnecessary to upload or fax/scan the attendance page.</p> <p><b>SE SIS Resources:</b> <a href="#">IEP Guides Process and Resources</a></p>	
<p><b>IEP: Fax/Scan Waiver of IEP Meeting to Amend IEP</b></p>	<ul style="list-style-type: none"> <li>• <b>Create, complete, and finalize</b> the <b>Waiver of IEP Meeting to Amend IEP</b></li> <li>• Print the <b>Waiver of IEP Meeting to Amend IEP</b> as a <b>PDF file</b></li> <li>• Send <b>Waiver of IEP Meeting to Amend IEP</b> to the parent via email</li> <li>• <b>Fax/Scan:</b> PDF of parent's permission* to waive the IEP meeting</li> <li>• <b>After the waiver appears as an attachment</b> in SESIS, you may proceed to amend the IEP</li> </ul> <p><b>SE SIS Resources:</b> <a href="#">IEP Guides Process and Resources</a>  <b>Video:</b> <a href="#">Amending an IEP with a Waiver of IEP Meeting in SESIS Video</a></p>	<p><b>Fax/Scan:</b> <i>Parent Permission* for Waiver of IEP Meeting to Amend IEP</i></p> <p>*PDF file of the email stating their permission to waive the meeting</p>
<p><b>Initial Placement: Prior Notice Package for Placement (when the parent returns consent/acknowledgment for the provision of services)</b></p>	<ul style="list-style-type: none"> <li>• <b>Create, complete and finalize</b> the <i>Prior Notice Package for Placement</i></li> <li>• Upon finalization, <b>print</b> (Save as PDF) and send the <i>Prior Notice Package for Placement and the Consent for Initial Provision of Services</i> to the parent</li> <li>• After consent is received, <b>attach</b> the signed consent by uploading it to the <i>Prior Notice Package for Placement</i></li> <li>• <b>Open</b> the <i>Prior Notice Package for Placement</i> document, and <b>complete the Fax bypass:</b> <i>Consent for Services - Initial</i> or the appropriate Fax bypass section</li> <li>• Click the link to <b>create</b>, and then <b>complete and finalize</b> the <i>Authorization to Attend</i> document to <b>print</b> (Save as PDF) and send to the parent</li> </ul> <p><b>Note:</b> If the <i>Prior Notice Package for Placement</i> was finalized before June 4, 2020, the Fax bypass section(s) will not be available. For these cases, <b>Fax/Scan</b> the consent/acknowledgment.</p> <p><b>SE SIS Resources:</b> <a href="#">Placement</a></p>	<p><b>Fax bypass*:</b> <i>Consent for Services – Initial</i> (additional sections, as needed)</p> <p>*Unless finalized before June 4</p>
<p><b>Prior Notice Package for Placement/Parentally Placed (when the parent returns</b></p>	<ul style="list-style-type: none"> <li>• Upon finalization, <b>print</b> (Save as PDF) and send the <i>Prior Notice Package for Placement/Parentally Placed and the Consent for Initial Provision of Services</i> to the parent</li> </ul>	<p><b>Fax bypass*:</b> <i>Consent for Services – Initial</i></p> <p>OR</p>

Process Impacted	Process Guidance	Fax Guidance
<p><b>consent/acknowledgment for the provision of services)</b></p>	<ul style="list-style-type: none"> <li>• After consent is received, <b>attach</b> the signed consent by uploading it to <i>Prior Notice Package for Placement/Parentally Placed</i></li> <li>• <b>Open</b> the <i>Prior Notice Package for Placement/Parentally Placed</i> document, and <b>complete the Fax bypass: Consent for Services – Initial</b>, or the <i>Fax bypass: Ack. of Services-Annual/Reevaluation</i></li> <li>• If necessary, update the Admin DBN/School location field in the Student Enrollment Information section of the student profile with the school the student will be attending</li> </ul> <p><b>Note:</b> If the <i>Prior Notice Package for Placement/Parentally Placed</i> was finalized before June 4, 2020, the Fax bypass section(s) will not be available. For these cases, <b>Fax/Scan</b> the consent/acknowledgment.</p> <p><b>SE SIS Resources:</b> <a href="#">Placement</a></p>	<p><b>Fax bypass*:</b> <i>Ack. of Services-Annual/Reevaluation</i></p> <p>*Unless finalized before June 4</p>
<p><b>Case Closing – Parent Revocation of Consent</b> (continued on next page)</p>	<ul style="list-style-type: none"> <li>• <b>Create</b> the <i>Case Closing</i> document and select <i>Parent Revocation of Consent</i> as the case closing reason</li> <li>• <b>Complete</b> the <i>Parent Withdrawal of Consent</i> section, and then <b>print</b> (Save as PDF) and <b>send</b> the letter to the parent to sign and return</li> <li>• After the parent provides written consent, <b>upload</b> the signed withdrawal of consent letter into the <i>Case Closing</i> document: Click <i>Navigate To</i>, select <i>File Attachments</i>, click <i>Attach files</i> and <b>upload</b> the letter</li> <li>• Verify the document is attached</li> <li>• <b>Complete the Fax bypass:</b> <i>Parent Revocation of Consent</i> section</li> <li>• <b>Add and complete</b> the <i>Parent Revocation – Notice of Termination</i> section</li> <li>• <b>Print</b> the <i>Parent Revocation – Notice of Termination</i> to allow the <i>Case Closing</i> document to be finalized – Do not send to Parent without a Date – the date populates upon finalization</li> <li>• <b>Finalize</b> the <i>Case Closing</i> document</li> <li>• <b>Print</b> (Save as PDF) and send the <i>Parent Revocation – Notice of Termination</i> to the parent</li> <li>• If, before the <i>Effective (Termination)</i> date, the parent decides to rescind the revocation of consent, upload the parent rescind letter to <i>Case Closing</i></li> <li>• <b>Complete the Fax Bypass:</b> <i>Parent Rescinded Rev. of Consent</i> section</li> </ul> <p><b>SE SIS Resources:</b> <a href="#">Special Circumstances</a></p>	<p><b>Fax bypass:</b> <i>Parent Revocation of Consent</i></p> <p><b>Fax bypass:</b> <i>Parent Rescinded Revocation of Consent</i> (if applicable)</p>

Process Impacted	Process Guidance	Fax Guidance
<b>State Supported School Acceptance – 4201</b>	<ul style="list-style-type: none"> <li>• Create the <b>State Supported School Acceptance – 4201</b> document in SESIS</li> <li>• <b>Fax/Scan:</b> The <b>State Supported School Acceptance – 4201</b> letter</li> <li>• After the <b>State Supported School Acceptance – 4201</b> letter is attached, finalize the document</li> </ul>	<b>Fax/Scan:</b> <i>State Supported School Acceptance – 4201 Letter</i>

### Additional Notes

- All parent referrals should be sent to the Principal/CSE Chair, who will direct these to the corresponding IEP team
- When it is not possible to print and mail documents to parents, you may follow steps for saving a SESIS document as a PDF file and send it via email (after obtaining consent for electronic mail from the parent); resources and step-by-step guidance is available on the [SE SIS Blended and Remote Learning](#) page of the SESIS InfoHub
- Although some documents may be finalized without attachments at this time, staff with access to a fax machine should fax in any required attachments as soon as possible or by the end of the next business day

### SE SIS Fax/Scan Guidance Summary for Blended and Remote Learning or School Building Closure

#### Use Fax bypass:

- Initial Referral (Parent Referral)
- Request for Reevaluation (Referral)
- Social History Package (Consent for Initial Evaluation and Home Lang. Identification Survey)
- Prior Notice Package for Placement (Consent for Services – Initial and other sections as needed)
- Prior Notice Package for Placement/Parentally Placed (Consent for Services – Initial and Ack. Of Services – Annual/Reevaluation)
- Case Closing (Parent Revocation of Consent and Parent Rescinded Revocation of Consent)

#### Use the designated workaround:

- IEP Attendance Page: You can finalize the IEP without faxing/scanning the Attendance Page into SESIS
- Consent for Additional Assessments for the *PWN – Reevaluation*, *PWN – Additional Reevaluation*, *Mandated Three Year Reevaluation*, or *PWN – Parent Request for Additional Assessments*: log two unique outreach attempts in the student's Events Log linked to the respective document

#### Documents that must be faxed/scanned:

**Important:** Every attempt must be made to fax/scan SESIS documents using the school fax machine or ATS scanner. The fax email inbox may be used **only** when the entire IEP team has approved medical accommodations and/or is working remotely.

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- *Request for Additional Reevaluation: Referral*
  - *Agreement for Additional Reevaluation: PWN – Additional Reevaluation* when the source of the Referral is not the parent
  - *Waiver of IEP Meeting to Amend IEP: Parent Permission to Waiver of IEP Meeting to Amend IEP*
  - *Request for Waiver of Mandated Three Year Reevaluation: Parent Permission to Request for Waiver of Mandated Three Year Reevaluation*
  - Parent request to conduct additional assessments (fax/scan this request into the *PWN – Reevaluation, PWN – Additional Reevaluation* or *Mandated Three Year Reevaluation* to be able to create the *PWN – Parent Request for Additional Assessments* document)
  - *State Supported School Acceptance – 4201: State Supported School Acceptance – 4201 Letter*