What’s New in Provider Assignment?

Provider Assignment (PA) will import mandates from newly finalized Individualized Education Programs (IEPs), Individualized Educational Service Plans (IESPs), Services Plans (SPs), and Comparable Service Plans (CSPs) nightly.

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<td>1. New Mandates</td>
<td>• Mandates will be available in PA on the next business day after the new IEP/IESP/SP/CSP has been finalized in SESIS. This includes Related Services, Paraprofessional Services, and SETSS Programs only.</td>
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<td>• INITIAL cases only – Mandates will only be loaded in PA after the Consent for Services – Initial has been faxed/scanned into SESIS and appears as an attachment to the PWN (CSPs are the exception)</td>
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<td>• For INITIAL cases, if parent consent has not been recorded in SESIS, this nightly process will continue to bypass the case until parental consent for services has been successfully recorded. After parental consent has been recorded, the nightly process will pick them up and make them available in PA by next business day</td>
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<td>• For INITIAL cases with a newly finalized IEP/IESP/SP only, parental consent for services must be obtained and faxed/scanned into SESIS before any mandates can be manually added in PA for the student. Once parental consent has been recorded, mandates may be manually added for the student in PA starting next business day</td>
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### 2. Provider Assignment (PA) Service Grid

- New assignment rows will appear in the appropriate *Awaiting* status sub-tab one day after the IEP/IESP/SP/CSP document is finalized.
- Mandates from the current IEP will be identifiable on the PA grid with icon (C).
- Mandates from the previous IEPs will be identifiable on the PA grid with icon (P).

### 3. All Mandates Tab

- If the user clicks on (C) or (P) icon from the PA grid, they will be taken to the All Mandates tab, pre-filtered on the Student NYCID where all of the assignment rows for that student can be viewed.
- Users may also navigate to the All Mandates tab by clicking on All Mandates from the PA service grid.

**Note:** After clicking on All Mandates, click Search to open the search panel and filters to search for the student. At least one filter criteria must be specified to display mandates.

- Access will be granted only to DOE Users with City-Wide Access, and Contract Agency Supervisors.
  - DOE users with City-Wide access can see all assignment rows for the student they search for, regardless of the Assignment Status.
  - Contract Agency Supervisors will only see students assigned to their specific agency.
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| 4. “Take Me To” Icon | • On the All Mandates tab, the user will see a “Take Me To” icon beside the row  
• Click this icon to go to that assignment row on the corresponding Awaiting or Receiving tab where action can be taken  
• An error message will display when staff is trying to navigate to a tab for which they do not have access from the All Mandates tab: “This student’s mandate is in a status for which you are currently not granted access.” | ![Image](image_url) |
| 5. No Creation of New Awaiting Row When Terminating an assignment from a Previous IEP | • Provider Assignment (PA) no longer automatically creates a new awaiting row after an assignment is terminated from a (P)revious IEP  
• The creation of a new Awaiting line in the termination pop-up message will default to NO. If the user continues without changing it, no new awaiting line will be created. However, the user has the opportunity to select YES and create a new awaiting row, if there is a legitimate reason to create a new awaiting line for the (P)revious mandate row being terminated, in order to continue assigning providers | ![Image](image_url) |
### 6. Open New Awaiting Line

- The “Open New Awaiting Line” feature is available to generate a new row on the Awaiting tab in the event the user learns that a new awaiting row was needed after terminating a row from a previous IEP/IESP/SP/CSP.

- **IMPORTANT** – Only users provisioned with the appropriate SESIS role will be able to open a new awaiting line, and there cannot be any active portions of the mandate remaining in a non-terminated status.

  - **Example #1**: The (P) mandate has not been split, it had been fully assigned to a provider and was then terminated without a new awaiting line. The checkbox will be available for use.

  - **Example #2**: The (P) mandate was split into two or more portions and each of those portions are now in a terminated status without a new awaiting line. The checkbox will be available for use.

  - **Example #3**: The (P) mandate was split into two or more portions but at least one of those portions remain in a non-terminated status – which means it can be used for assignment. The checkbox will NOT be available for use in this case, not until all portions meet the criteria of Ex2 above.
7. **Compare IEPs**

- Compare IEPs is a new tab that displays the (C)urrent IEP and (P)revious IEP mandates for the student side-by-side in the Summary of Student Mandates window.

- Click on the Student’s NYCID located on the PA service grid to open the Summary of Student Mandates window and access the Compare IEPs button.

- Compare IEPs will display Related Services, Paraprofessional Services, and SETSS Programs only. Any other services or programs stated on the conference document in SESIS will not appear here.

- This tab can be used to verify if any changes were made to the mandates from the previous IEP to the current IEP. If the (C)urrent mandate is identical to the (P)revious mandate (no changes), continue to service the (P)revious mandate until the end of the term.

- If mandates are not identical on the Compare IEPs tab, confirm with the agency/provider whether the current provider (or a new one identified by the same agency) can service new mandate. If so, terminate (P)revious mandate and assign (C)urrent mandate to new agency/provider without going through the assignment cascade (primary, secondary/tertiary, RSA).

**Note:** If the current provider/agency is unable to continue providing services, a new provider should be assigned using the assignment cascade.

- The mandates’ PROJECTED BEGINNING / SERVICE DATE(S) and SERVICE END DATE from the IEP will be displayed here as well.

**Note:** The numbers after the language specify frequency, duration and group size.
8. Manually Add/Delete Mandates (Updated)

- Functionality will be limited to following the roles, with few exceptions:
  - **SEPC** = CSE SEEPPO (Special Education Placement Officer)
  - **CSEC** = CSE Chairperson
  - **SCAO** = Central Office: Division of Students with Disabilities and English Language Learners
  - **CADM** = ORCS: Contract Administrators

- All other roles who have access will only be able to manually delete compensatory services for all Para Services, Oral Transliterators and/or Sign Language Interpreters.
### 8. Manually Add/Delete Mandates (continued)

- Any DOE user (regardless of high level role) who currently has access to manually add a row) will also be able to add the following three service types as either regular or compensatory: Assistive Technology, Para – Alternate Placement, Interim Monolingual Speech. These will have specific guided actions/messages once selected and user must indicate whether to PROCEED/CANCEL.

- If the mandate being deleted is sourced from the IEP (not a manually added mandate), PA will issue a red warning to remind the user that they are deleting a legitimate service that was stated on the IEP before proceeding.

### 9. Editing DBNs – Warning Notification

- When editing the DBN values with the pencil icon, a yellow warning will appear, allowing the user to proceed with the DBN change or to cancel.

You are attempting to permanently delete at least one student mandate that is recorded on the student's official IEP/IESP/ISP/CSP in SESIS. It is not recommended to proceed with this deletion. Doing so will place the Provider Assignment application out of sync with the student's IEP in SESIS.

If you choose to proceed, do so with caution. You will be required to enter a valid business rationale for this deletion, which will be reviewed on upper-level management and/or audit reports.

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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| **10. Updates to Attending DBNs** (Admin DBN/ Phys Loc DBN) | • **Attending DBNs** will update with a new school location after the student is transferred and moved in SESIS  
• Changes to the student’s Attending DBNs in SESIS will not be seen in PA until the next business day  
• After the Attending DBNs change, the previous school’s mandate rows attached to the student will be terminated with the provider with a termination reason of **“Student Transferred”**  
  - This reason is found when selecting the view history tab under the ‘Action Reason’ column after clicking the Student NYCID | ![Before Update:](image1.png) ![After Update – Student moved from Charter (84M351) to Public (09X064)](image2.png) |
| **11. Updates to ONLY Authorized DBNs** (Auth Admin DBN/ Auth Physical DBN) | • **Authorized DBNs** will change in PA for students pending a move to a different school location  
• **Authorized DBNs** will also update in PA if the placement recommendation of the newly finalized PWN for Placement is for a new school  
• There will be no changes to the Attending DBNs for either of the above scenarios  
• Changes to the student’s Authorized DBNs in SESIS will not be seen in PA until the next business day | ![Before Update:](image3.png) ![After Update:](image4.png) |
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| 12. Never Served/ Retroactively First Attend Icon | • 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 will give the provider an opportunity to retroactively enter the First Attend Date (FAD) or state that they never saw the child | ![Image](image1.png) |
| 13. RSA Package Generated after Provider Confirms | • There is no longer a manual process to create the Related Service Authorization (RSA) Package when the Attending DBNs change in PA for students with applicable mandate rows and RSA already created with a provider assigned  
• An RSA Package will be automatically generated in the DRAFT mode when the provider fully confirms the assignment. If confirmed, the assignment status will change to RSA Created  
**Note:** If the Provider rejects the assignment, then the assignment row will revert back to Awaiting RSA  
• If the row is in Awaiting Independent Provider Confirmation status, the provider information is inherited from the previous RSA for that row  
• If applicable, the same contact from a previously generated RSA will be automatically imported on the new auto-generated RSA package  
• Parent Contact & Preferred Written Language is also available in the new auto-generated RSA package | ![Image](image2.png) |
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- Terminated – Never Served | - Terminated Without First Attend status will not be a final status on an assignment row. System will allow the provider to take further action to complete the process  
If a provider was terminated prematurely prior to a First Attend, the provider can now back-date the First Attend Date (FAD) in which the Assignment Status will be changed to Terminated  
After the student’s Attending DBN changes as a result of moving to a new school, the rows attached to the former school will be terminated appropriately; if there had not been a provider assigned at the former school when the child moved, the status will go to new status, Terminated – Never Assigned  
If the provider never served the child, this can be indicated, and a new Assignment Status is applied to the mandate. In this case, the Assignment Status will be updated to Terminated – Never Served | ![Image](image1.png)  
![Image](image2.png)  
![Image](image3.png)
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<td><strong>15. New Bid Status Value:</strong>  &lt;br&gt;• Closed – Student Transferred</td>
<td>• In the event that a student moves in the middle of a Contract Agency Bidding process, the bidding will be closed with a new status to indicate to the user when this scenario occurs. These will be identified with the new bid status: <strong>Closed – Student Transferred</strong>  &lt;br&gt;<strong>Note:</strong> Bid status Closed – Student Inactivated will display, however this feature is not currently functioning</td>
<td><img src="image_url" alt="" /></td>
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