



Assigning a Contract Agency for Community School/ D75/Charter School Students

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Introduction

This training guide provides instructions for CSEs on the Provider Assignment process of assigning Contract Agencies for Community School, District 75, and Charter School students. The guide is divided into two sections [Assigning a Primary Contract Agency](#) and [Assigning a Secondary/Tertiary Contract Agency](#).

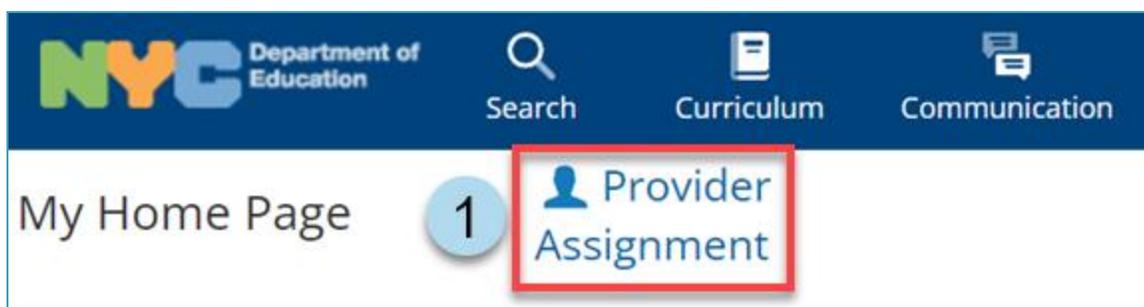
Assigning a Primary Contract Agency

When efforts to locate a DOE provider are unsuccessful, the assignment of a contract agency may commence.

Note: For Charter School students, skip to the [Locating a Primary Contract Agency](#) section of this document.

Moving Mandate(s) to the Awaiting Contract Agency Sub-Tab

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



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



3. **Set the filters** to display the mandate(s) to assign to a *Primary Contract Agency*.

4. Click **Search** at the bottom of the search panel.

Student NYCID : Student First Name : Student Last Name : D75 : -- Select --
Admin DBN : Auth Admin DBN : Auth Phys District : -- Select -- CSE District : -- Select --
Phys Loc DBN : Auth Phys Loc DBN : Auth Phys Borough : -- Select -- Home District : -- Select --
BFSC : -- Select -- CSE : -- Select -- Grade : -- Select -- Assignment Status : -- Select --
Service Type : -- Select -- Group/Indiv : -- Select -- Group Size : -- Select -- Mono/Bill : -- Select --
Frequency : Duration : Mandate Status : -- Select -- Language : -- Select --
Provider : Agency : First Attend Discrepancy : -- Select --

5. Click the **pencil** icon in the far left column from the search results to view mandate details.

Select	Student NYCID	Last Name	First Name
All <input type="checkbox"/>	705491313	T	C

6. **Verify** that the mandate(s) reflect what is under the *Recommended Special Education Programs and Services* section of the student's last finalized *Individualized Education Program (IEP)*. Click **Cancel** to exit the mandate details window or click **Save Changes** to save any edits.

Student :
Student NYCID: 123456789 First Name: JANE Last Name: SMTH DOB: 06/24/2001
Attending Admin DBN: 84M350 Auth Admin DBN: 84M350 CSE: CS10 Grade: 11TH GRADE
Attending Physical DBN: 84M350 Auth Physical DBN: 84M350 CSE District: 05 Home District: 5

IEP:
IEP ID: 1234567 IEP Conference Date: Parentally Placed: No
Source Document Type: IEP IEP Authorization Date: 09/01/2017 Initial Case: Yes

Mandate:
Is this a Compensatory Service? No 10 month/2 month: 10 month Service Type: S.E. Teacher Support Service (SETSS)
Is this for an Interim monolingual provider? No Service Start Date: 08/01/2017 Language: ENGLISH
Indiv/Group: Group Frequency: 3 Duration: 1
Group Size: 8 Frequency Terms: Weekly Duration Terms: Periods

Assigned Provider:
Provider Name: Assignment Status: Assistance Not Requested First Attend Date:
Assigned Frequency: Agency TaxID:

Note: A soft warning will appear when editing the DBN values with the pencil icon, allowing the user to proceed with the DBN change.

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.

7. Place a **checkmark** next to the mandate(s) to be moved to the *Awaiting Contract Agency* tab.

Select	Student NYCID	Last Name	First Name
<input checked="" type="checkbox"/>		T	C
<input type="checkbox"/>	705491313	T	C

8. From the *Change Assignment Status* dropdown, select **Requested Contract Agency** and click the **Change Assignment Status** button.

-- Select Assignment Status Here --

Requested Contract Agency

Awaiting RSA

Awaiting Authorization for Independent SETSS Teacher

Change Assignment Status

9. Click **OK** in the pop-up window to confirm changing the *Assignment Status*.

You are about to change the Assignment Status to 'Requested Contract Agency' for 1 record.

Student NYCID	Last Name	First Name
705491313	T	C

Cancel OK

Note: A confirmation message will appear.

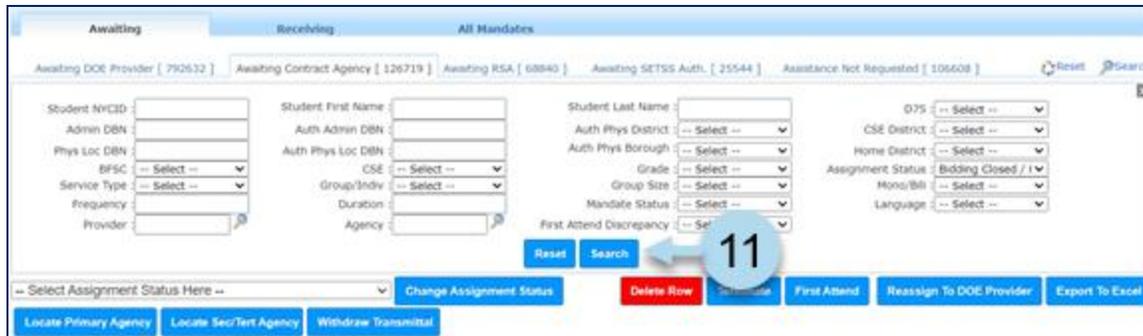
Mandate(s) were updated.

Locating a Primary Contract Agency

10. Click on the Awaiting Contract Agency sub-tab.



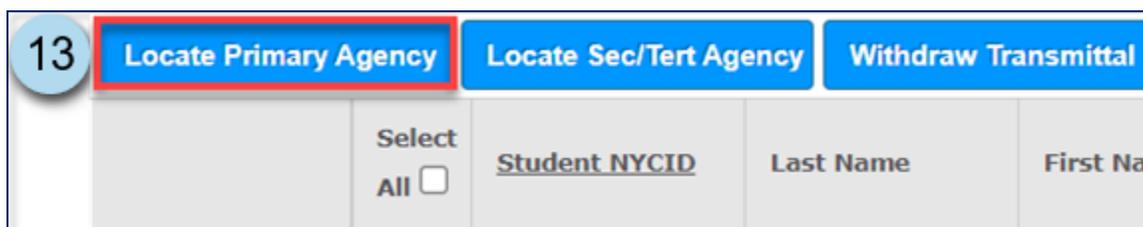
11. Use the **Search** feature to display the mandate(s) to be assigned a *Primary Contract Agency*, if not already visible.



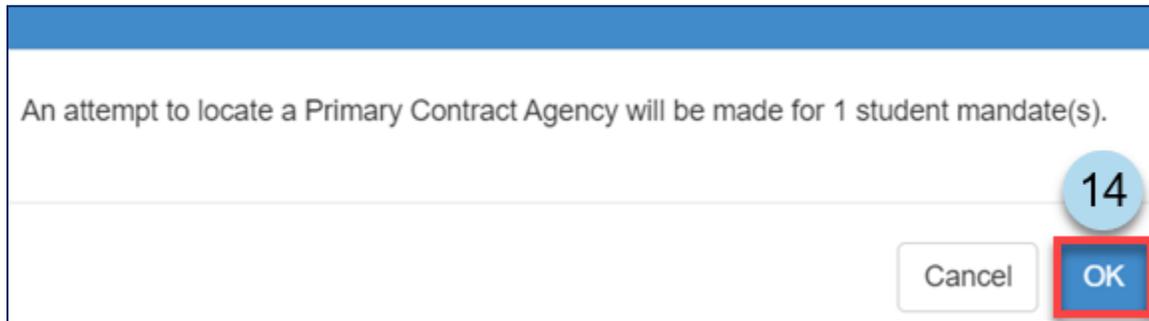
12. Place a **checkmark** next to the mandate(s).

	Select	Student NYCID	Last Name	First Name
 	<input checked="" type="checkbox"/>	241860923	N	J
 	<input type="checkbox"/>	241860923	N	J

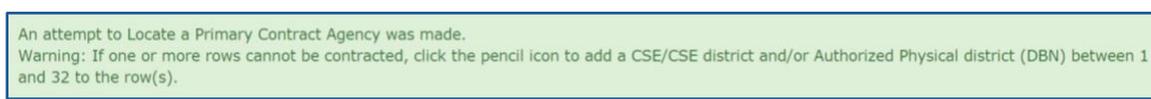
13. Click the **Locate Primary Agency** button.



14. Click **OK** in the pop-up window to confirm that an attempt will be made to locate a *Primary Contract Agency*.



Note: The system will display a message at the top of the screen confirming an attempt to locate a *Primary Contract Agency* was made. If the DOE has identified a primary agency, the *Agency* column will populate with the name of the contract agency and change the *Assignment Status* to *Awaiting Contract Agency Provider*.

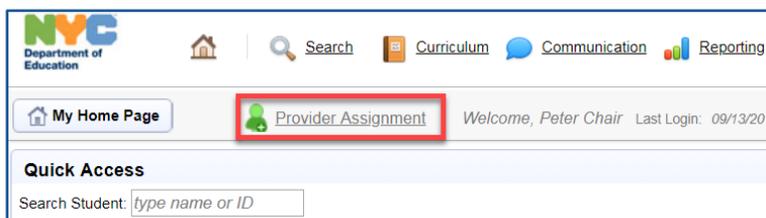


Assigning Secondary/Tertiary Contract Agency

When efforts to locate a primary contract agency provider are unsuccessful, the search for a secondary/tertiary agency may commence.

Searching for Mandate(s) to Assign a Secondary/Tertiary Contract Agency Provider

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



2. Click the *Awaiting Contract Agency* sub-tab.



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



4. **Set the filters** to display the mandate(s) to be assigned a *Secondary/Tertiary Contract Agency*.
5. Click **Search** at the bottom of the search panel.

A screenshot of a search filter panel. It contains various input fields and dropdown menus for filtering search results. Callout 4 points to the 'Mandate Status' dropdown menu, and callout 5 points to the 'Search' button at the bottom right of the panel.

6. Place a **checkmark** next to the mandate(s) to be assigned a *Secondary/Tertiary Contract Agency*.

A screenshot of a table with columns for 'Student NYCID', 'Last Name', and 'First Name'. A row is highlighted in blue, and a callout 6 points to a checked checkbox in the 'Select' column.

Select	Student NYCID	Last Name	First Name
<input checked="" type="checkbox"/>		T	C

Note: Select mandate(s) only with the following Assignment Status values: Contract Agency Rejected, Contract Agency Timeout, Primary Contract Agency Does Not Exist, and, if bypassing Primary Contract Agency search, Requested Contract Agency.

7. Click the **Locate Sec/Tert Agency** button to display the *Secondary/Tertiary Contract Agency* Look-Up screen.

A screenshot of the agency selection interface. It features a dropdown menu for 'Assignment Status' and three buttons: 'Locate Primary Agency', 'Locate Sec/Tert Agency', and 'Withdraw Transfer'. Callout 7 points to the 'Locate Sec/Tert Agency' button, which is highlighted with a red box.

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

Example:

A screenshot of an error message dialog box. The message reads: "You are attempting to locate contract agencies for student mandates with different Service Type. Please ensure that the selected mandates share the same Service Type before attempting to locate an agency." An 'OK' button is located at the bottom right of the dialog box.

Sending Notification to Solicit a Bid

- Input a **Response Due Date** on the *Secondary/Tertiary Contract Agency Look-Up* screen.
- Place a **checkmark next to the agencies** to send a bid invitation to service the student's mandate. A SESIS notification will be sent to the supervisor of each contract agency selected for this batch.

Select	Contract Line Item ID#	Agency Name	Service Type	Language	Borough	District	Tier	Rank
<input checked="" type="checkbox"/>	47938	P	Occupational Therapy	ENGLISH	Brooklyn	13	Secondary	1
<input type="checkbox"/>	47939	T	Occupational Therapy	ENGLISH	Brooklyn	13	Secondary	2
<input type="checkbox"/>	47940	A	Occupational Therapy	ENGLISH	Brooklyn	13	Secondary	3
<input type="checkbox"/>	47941	E	Occupational Therapy	ENGLISH	Brooklyn	13	Tertiary	1

Note: Agencies must be selected in the tier/rank listed order. You may decide to skip to agencies at a higher tier/rank to participate in this batch notification, but they must still be selected in the listed order.

- Click **Notify Agency**.
- Click **Send** in the pop-up window to confirm that a SESIS Inbox message will be sent to the selected agencies' supervisors.

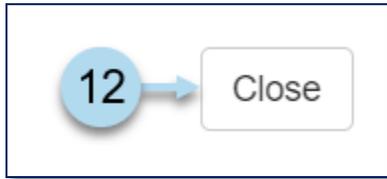
Select	Contract Line Item ID#	Agency Name	Service Type	Language	Borough	District	Tier	Rank
<input checked="" type="checkbox"/>	47938	P	Occupational Therapy	ENGLISH	Brooklyn	13	Secondary	1
<input type="checkbox"/>	47942						Tertiary	2
<input type="checkbox"/>	47943						Tertiary	3
<input type="checkbox"/>	47944						Tertiary	3
<input type="checkbox"/>	47945						Tertiary	4
<input type="checkbox"/>	47946						Tertiary	
<input type="checkbox"/>	47947	N	Occupational Therapy	ENGLISH	Brooklyn	13	Tertiary	

Note: The system will display a message at the top of the screen confirming the batch notification was successfully created. The *Assignment Status* changes to *Pending Contract Agency Bid Responses*.

The batch notification was successfully created. The agency supervisors for the selected contract agencies will receive a notice in their SESIS inbox regarding the open cases included in this batch.

The selected agencies will log into SESIS, navigate to *Provider Assignment*, and submit their bids on each mandate. Staff reviews the submitted bids when the *Response Due Date* arrives and closes the bidding. The system will automatically recommend the highest-ranked *Contract Agency/Provider*, and staff has the option to award one of the recommended agencies.

12. To close the Secondary/Tertiary Contract Agency Look-Up screen, click **Close**.



Awarding Contract Agency

13. After the contract agency bidding process for the mandate(s) has closed and the *Assignment Status* is *Bidding Closed / Ready to Award*, click on the **Award icon** to award an agency.

13		Select	<u>Student NYCID</u>	Last Name	First Name
C		<input type="checkbox"/>		J	N
P		<input type="checkbox"/>		D	E

14. If one or more agencies placed a bid, the system-recommended contract agency will be listed first and be automatically selected. Click the **Award Agency** button to award the case to the contract agency.

Award Contract Agency

Student Information: #

First Name: J	Last Name: T	DOB:	Grade: .
Admin DBN:	Auth Admin DBN:	District:	CSE District:
Physical DBN:	Auth Physical DBN:	Borough:	Home District:
Cluster:	Network:	CSE:	D75:

Occupational Therapy

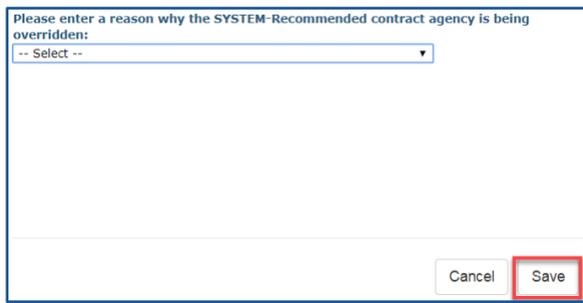
Frequency: 1 Weekly	Duration: 30 Minutes	Group Size: 2	Language: ENGLISH
Start Date: 08/01/2021	End Date:	Mandate Status: Unassigned	

Response Due Date: 04/05/2022 Number Of Bids: 1

Contract Agency Name	Bidded Provider	Bidded Freq	Service Type	Language	Borough	District	Tier	Rank
	A	1	Occupational Therapy	ENGLISH	Staten Island	84	Tertiary	13

14

Note: The message below will appear if a different contract agency is selected other than the system-recommended contract agency. Select why the system-recommended contract agency is being overridden and click **Save**.

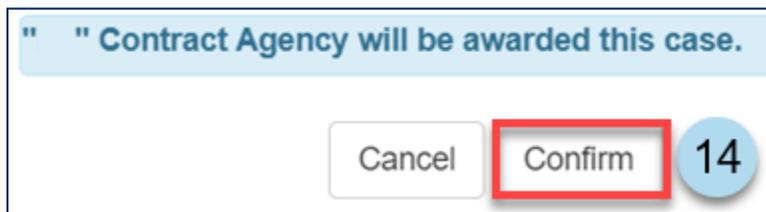


Please enter a reason why the SYSTEM-Recommended contract agency is being overridden:

-- Select --

Cancel Save

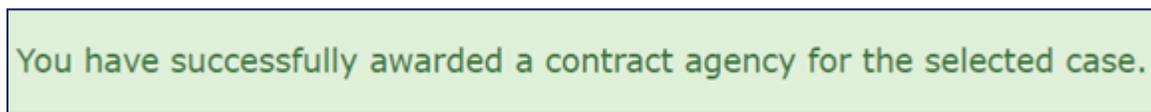
15. Click **Confirm**.



" " Contract Agency will be awarded this case.

Cancel Confirm 14

16. A confirmation note will appear at the top of the screen stating that a contract agency has been awarded for the case.



You have successfully awarded a contract agency for the selected case.

Note: The assignment status for the case has now changed to *Awaiting First Attend*.