THE SESIS TEAM | Ensuring all students have access. Together we can!

NYC Department of Education

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

## Contents

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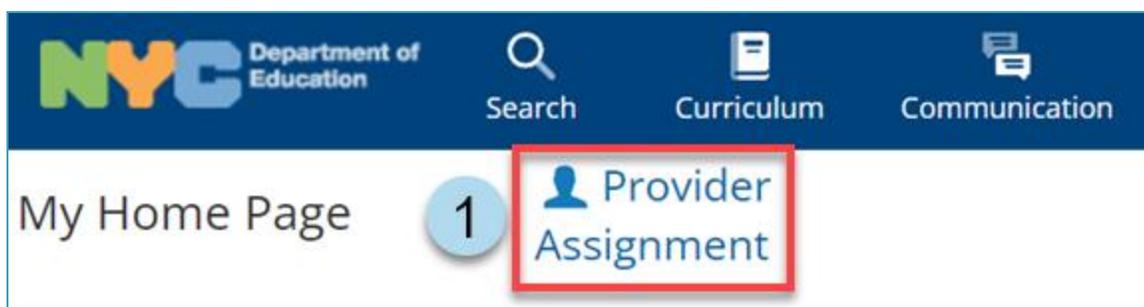
2. Click the **Search** link to open the panel.



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.



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



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.

**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.



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



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



**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 mandates(s) to be assigned a *Primary Contract Agency*, if not already visible.



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



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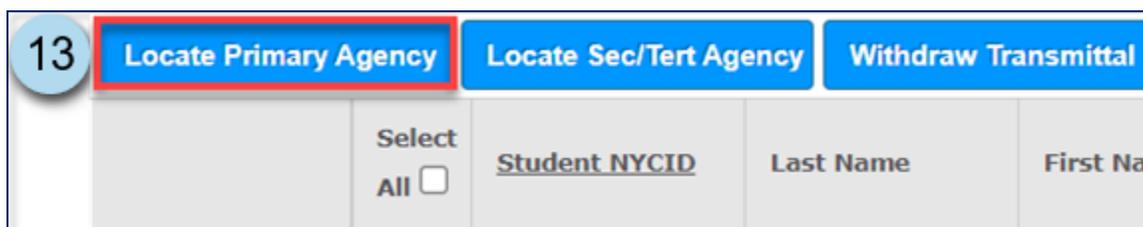
14. Click **OK** in the pop-up window to confirm that an attempt will be made to locate a *Primary Contract Agency*.



An attempt to locate a Primary Contract Agency will be made for 1 student mandate(s).

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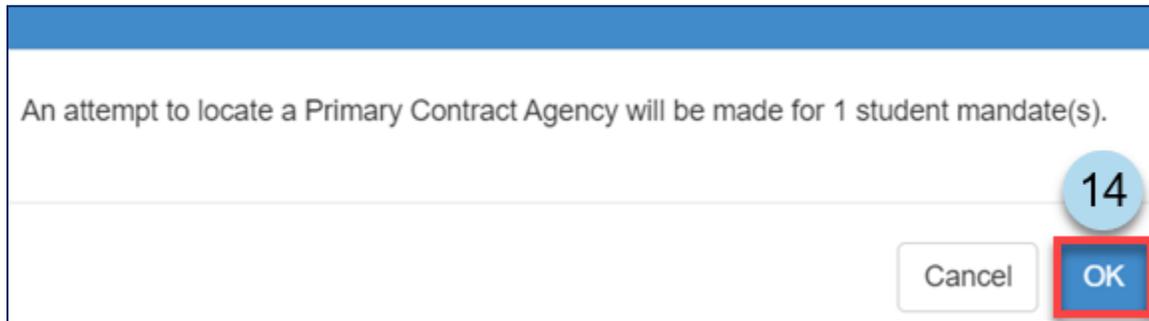
**Note:** The system will display a message at the top of the screen confirming an attempt to locate a *Primary Contract Agency* was made. If the DOE has identified a primary agency, the *Agency* column will populate with the name of the contract agency and change the *Assignment Status* to *Awaiting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

An attempt to Locate a Primary Contract Agency was made.
Warning: If one or more rows cannot be contracted, click the pencil icon to add a CSE/CSE district and/or Authorized Physical district (DBN) between 1 and 32 to the row(s).
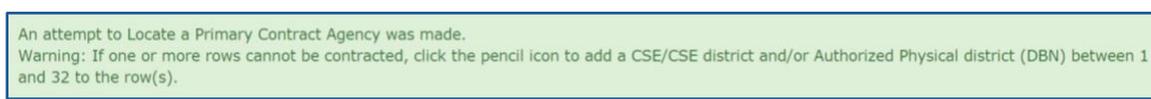
## Assigning Secondary/Tertiary Contract Agency

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.
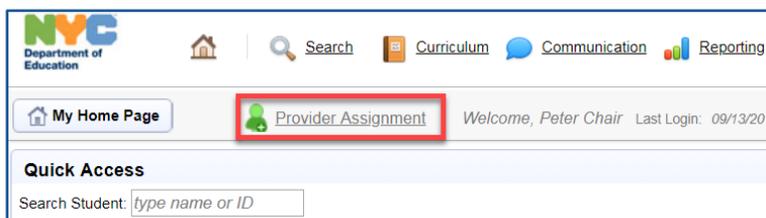


2. Click the Awaiting Contract Agency sub-tab.



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.



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



**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.



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

Example:

8.  Input a **Response Due Date** on the *Secondary/Tertiary Contract Agency Look-Up* screen.

9.  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.



**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.

10. Click **Notify Agency.**

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



**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**.
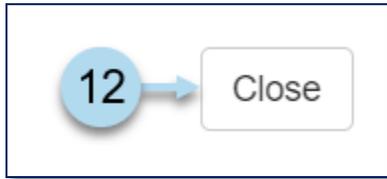


## Awarding Contract Agency

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.



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.

**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**.



15. Click **Confirm**.
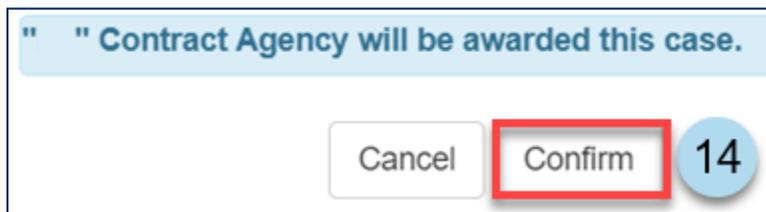


16. A confirmation note will appear at the top of the screen stating that a contract agency has been awarded for the case.
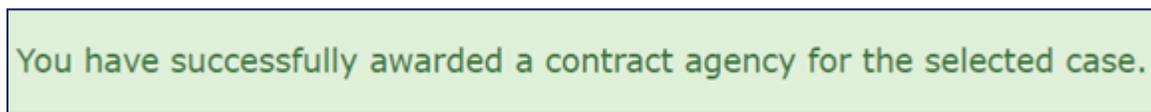


**Note:** The assignment status for the case has now changed to *Awaiting First Attend*.