



Provider Assignment Checklist: First Attending, Confirming and Rejecting Assignments (for Independent Providers)

Introduction

This training guide provides instruction for independent providers on how to record a First Attend Date, Confirm Assignments, and Reject Assignments in Provider Assignment when servicing students through a Related Service Authorization (RSA).

Recording a First Attend

- □ Navigate to Provider Assignment from the SESIS home page. The Awaiting Contract Agency subtab of the Awaiting tab is displayed by default.
- □ Navigate to the Awaiting RSA sub-tab.

Note: This option is also available under the Awaiting Contract Agency and Awaiting SETSS Auth. sub-tabs.

- Click **Search** to open the search panel.
- □ Set the filter for an Assignment Status of Awaiting First Attend.
- Click **Search** at the bottom of the search panel.
- □ Place a **checkmark** next to the mandate(s) for which you want to *First Attend* and click the **First Attend** button.
- □ For each mandate displayed in the *First Attend Confirmation* screen, **enter the date** you first provided services to the student in the *First Attend* field, and then click **OK**. The mandate will move from the *Awaiting RSA*, sub-tab to its counterpart *Receiving RSA* sub-tab.

Recording First Attend Delay

A First Attend Date must be entered within five school days after the mandate is assigned to the provider; otherwise, a First Attend Delay icon will appear in the left margin of the mandate row.



□ Navigate to the Awaiting RSA sub-tab.

Note: This option is also available under the Awaiting Contract Agency and Awaiting SETSS Auth. sub-tabs.

- Click **Search** to open the search panel.
- □ Set the filter for an Assignment Status of **Reason for Delay Needed**.

- Click **Search** at the bottom of the search panel.
- Click on the **First Attend Delay** icon and enter a reason for the delay.
- Click OK.

Never Served/Retroactively First Attend

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 window gives the provider an opportunity to retroactively enter the First Attend Date (FAD), or state that they never served the child.



□ Navigate to the Awaiting RSA sub-tab.

Note: This option is also available under the Awaiting Contract Agency and Awaiting SETSS Auth. sub-tabs.

- Click **Search** to open the search panel.
- □ Set the filters for an Assignment Status of Terminated Without First Attend.
- Click **Search** at the bottom of the search panel.
- Click on the Never Served/Retroactively First Attend icon.
- □ To Retroactively First Attend, select the **Student NYCID** under the Retroactively First Attend This Case section and enter the **First Attend date** and **Reason for Discrepancy**.

Note: The only *Reason for Discrepancy* available is *Other*. Describe the reason in the adjacent textbox.

□ To indicate that you Never Served, select the **Student NYCID** under the Never Served section and select the **Reason** from the dropdown menu.

Note: If the Reason is Other, describe the reason in the adjacent textbox.

Retro	actively Firs	t Attend T	his Case						×
The First Attend Date indicated here should be the first date the assigned provider actually provided services. The assigned provider will not be permitted to submit invoices for this [related/SETSS] service before this date.									
0	Student NYCID 223679895	Last Name CROSBY	First Name AHMAD	Current Provider Leah Kermanian	Service Start Date 08/01/2019	Earlieast Encounter	First Attend	Reason For Discrepancy	Other Reason For Discrepancy
Neve	r Served								
Entering a Never Served reason will update the assignment and remove any association of the assigned provider with this student. The assigned provider will not be permitted to submit invoice for this [related/SETSS] service at all. Once submitted, the student mandate will be updated to Terminated Never Served.									
	Student NYCID	Last Nam	e First N	lame Current P	Provider Service	Start Date Reas	on		Other Reason
0	223679895	CROSBY	AHMAI	D Leah Kerr	manian 08/01/2	2019 S	elect a reason	Ŧ	
									Cancel OK

Confirming or Rejecting an Assignment

When the Attending DBNs (Admin DBN/ Phys Loc DBN) change for students 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.

Note: Changes to the student's Attending DBNs in SESIS will not be seen in Provider Assignment until the next business day.

- □ Navigate to the Awaiting RSA sub-tab.
- Click **Search** to open the search panel.
- □ Set the filters for an Assignment Status of Awaiting Independent Provider Confirmation.
- Click **Search** at the bottom of the search panel.
- □ To Confirm or Reject the assignment, **place a checkmark** next to each service recommendation(s) you'll continue to service or wish to reject, then click **Confirm**.
- □ To Confirm the assignment, click **OK**.

Note: The mandate will stay on the grid with an updated Assignment Status of Awaiting First Attend.

□ To *Reject* the assignment, check the **Reject** checkbox, select a **Reason for Rejection** as to why you are not continuing service, and then click **OK**.

Note: The mandate will immediately fall off your service recommendation grid in order to be assigned to another provider.