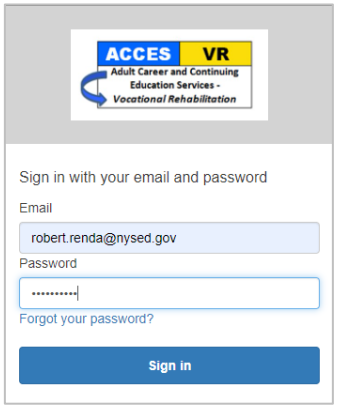
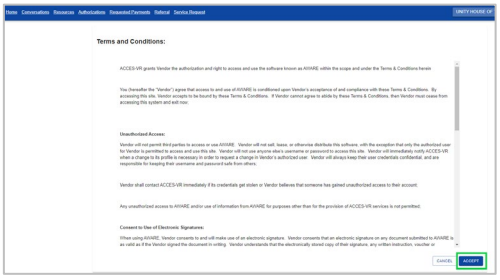
Vendor Portal – Potentially Eligible (PE) Referral

The step-by-step instructions below are provided for you to complete the process of a creating a PE Referral in the Vendor Portal. To create a new PE Referral in the Vendor Portal, you will take the following path:

1. Login to Vendor Portal
2. Create New Referral and Save as Draft
3. Display Draft Referral
4. Complete Referral Information and Submit

Activity Name	Testing Procedure Notes
Objective 1: Login to Vendor Portal	
1.01 Enter Email	• Using a ***Chrome*** browser, navigate to the Vendor Portal and enter your **Email**.
1.02 Enter Password	• Enter your **Password** and click the **Sign In** button. 
1.03 Terms and Conditions	• The Terms and Conditions will display on the main page. Select Accept. 

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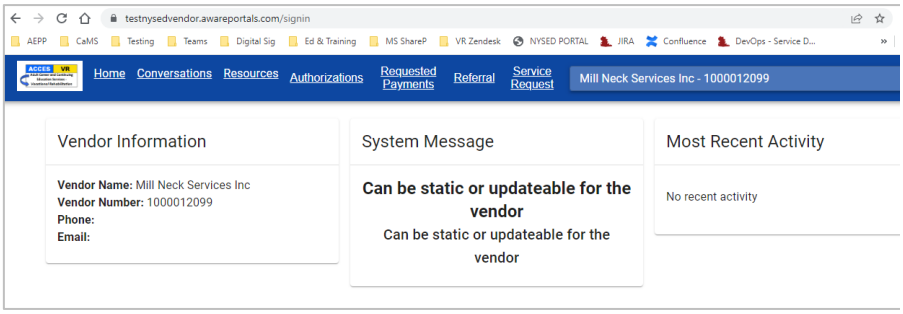
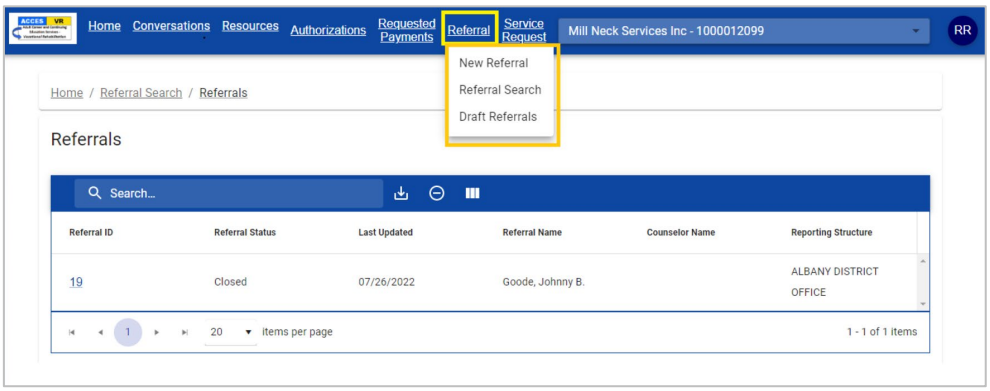
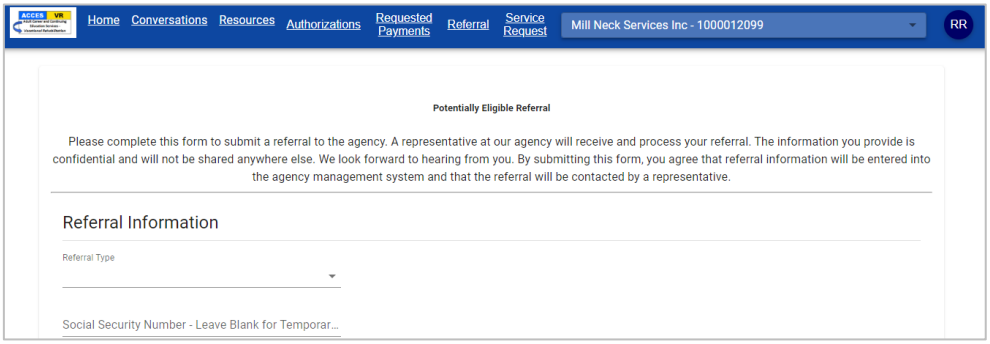
Activity Name	Testing Procedure Notes
1.04 Verify Portal Page Displays	• Verify that the **Vendor Portal** home page displays. Note: as NYSED continues to adapt fields and content, your page may not look exactly like the one shown. 
Objective 2: Create New Referral and Save as Draft	
2.01 Display Referral Navigation	• From the main menu along the top of the **Portal** page, click the link for **Referral** to display **Referral Navigation** items. 
2.02 Display PE Referral Page	• Click **New Referral** to display the **Potentially Eligible Referral** page. 

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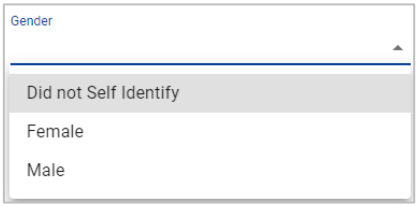
Activity Name	Testing Procedure Notes
2.03 Referral Type	• In the section: Referral Information, use the drop-down arrow for the **Referral Type** field to select the available option **PE**.
2.04 Enter SSN	• In the section: **Referral Information**, enter a **Social Security Number (if available)**. Note: the SSN number will be masked as you type, and the surrounding font will be red until you have entered 9 digits. • ***DO NOT use any SSN beginning with 999-xx-xxxx. This is reserved for Temporary SSNs that get generated by the Aware case management system if needed.*** • Completed SSN field:
2.05 Enter Name	• In the section: **Referral Information**, enter values in the fields provided for **First Name**, **Middle Name** and **Last Name**.
2.06 Preferred Pronoun	• In the section: **Referral Information**, use the drop-down arrow to select a value for **Preferred Pronoun** from the list provided.
2.07 Gender	• In the section: **Referral Information**, use the drop-down arrow to select a value for **Gender** from the list provided. 

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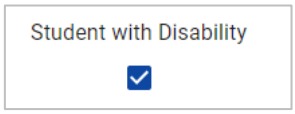
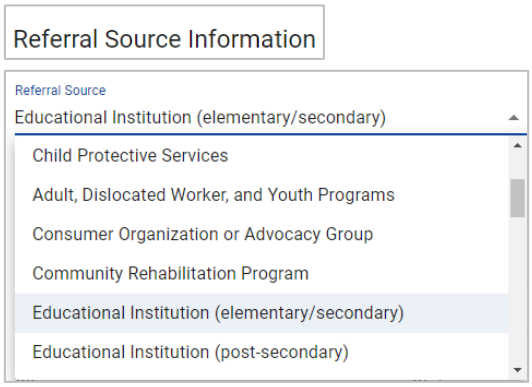
Activity Name	Testing Procedure Notes
2.08 Birth Date	• In the section: **Referral Information**, use either the date picker (calendar icon) or enter the **Birth Date** using the following format *mm/dd/yyyy*.
2.09 Ethnicity	• In the section: **Referral Information**, use the drop-down arrow to select a value(s) for **Ethnicity** from the list provided.
2.10 Student With Disability	• In the section: **Referral Information**, use the checkbox provided to indicate the referral is a **Student with Disability**. 
2.11 Referral Source	• In the section: **Referral Source Information**, use the drop-down arrow to select a value for **Referral Source** from the list provided. 
2.12 Referral Source First Name	• In the section: **Referral Source Information**, enter text in the field provided for **First Name**.

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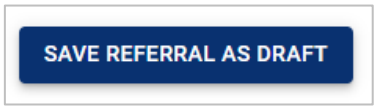
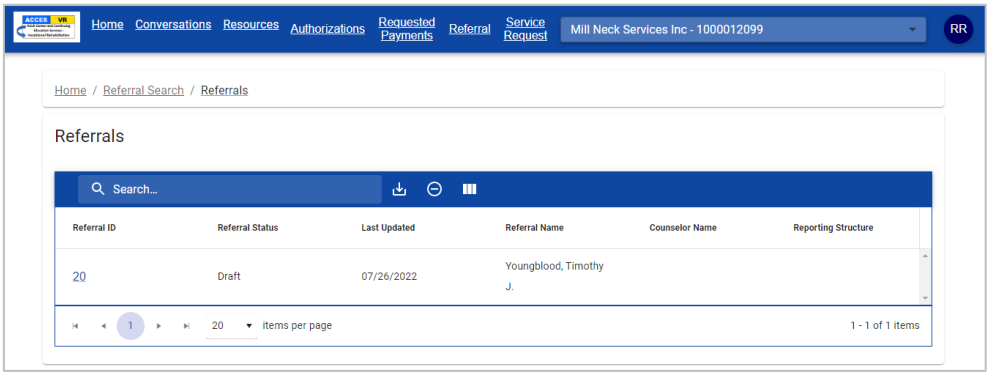
Activity Name	Testing Procedure Notes
2.13 Referral Source Last Name	• In the section: **Referral Source Information**, enter text in the field provided for **Last Name**.
2.14 Save Referral As Draft	• To save the information you have entered so far, at the bottom of the **PE Referral** page, select the button **SAVE REFERRAL AS DRAFT**. 
2.15 Confirm Save Referral As Draft	• Acknowledge the message box that appears at the top of the page to confirm saving your **Referral As Draft**.
2.16 Display Draft Referrals	• From the main menu along the top of the **Portal** page, click the link for **Referral** to display **Referral Navigational** items. • Now click the **Draft Referrals** link to display a **Referrals** page with a grid of your referrals in **Draft** status: 

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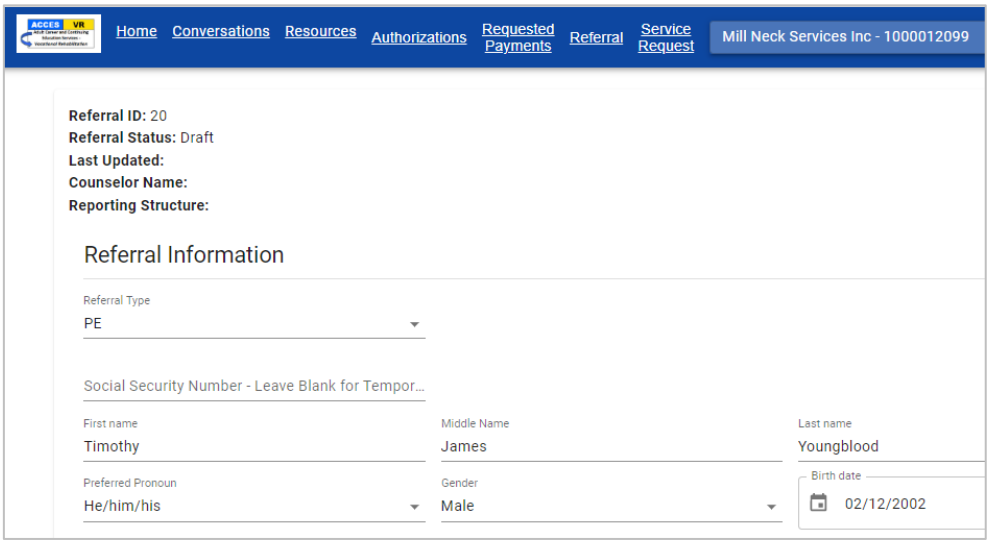
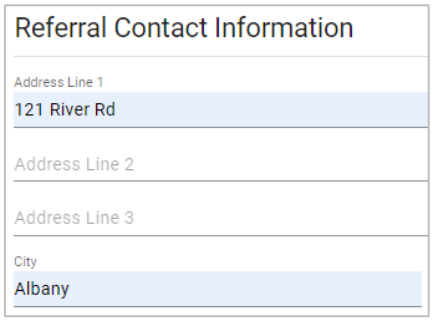
Objective 3: Complete and Submit Referral	
Activity Name	**Testing Procedure Notes**
3.01 Display Referral Form	• Using the **Referral ID** link, select a referral to access the **Referral** form page. 
3.02 Referral Address and City	• In the section: **Referral Contact Information**, enter text in the fields provided for **Address Line 1** and **City**. 
3.03 Referral State	• In the section: **Referral Contact Information**, use the drop-down arrow to select a value for **State** from the list provided.

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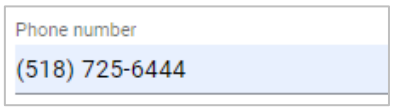
Activity Name	Testing Procedure Notes
3.04 Referral County	• In the section: **Referral Contact Information**, use the drop-down arrow to select a value for **County** from the list provided.
3.05 Referral Zip	• In the section: **Referral Contact Information**, enter a 5-digit value in the field provided for **Zip**.
3.06 Referral Email	• In the section: **Referral Contact Information**, enter text in the field provided for **Email**. • *Note: there is no validation done on this field in the referral form. If an incorrectly formatted email is entered, it will not be accepted in Aware.*
3.07 Referral Phone Number	• In the section: **Referral Contact Information**, enter a 10-digit value in the field provided for **Phone Number**. 
3.08 Referral Phone Type	• In the section: **Referral Contact Information**, use the drop-down arrow to select a value for **(phone number) Type** from the list provided.

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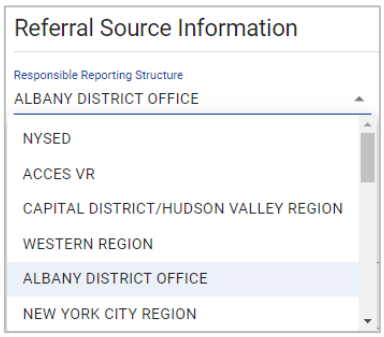
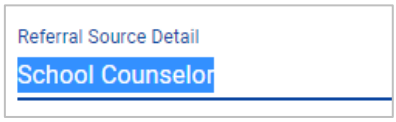
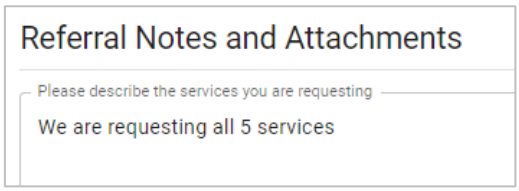
Activity Name	Testing Procedure Notes
3.09 Responsible Reporting Structure	• In the section: **Referral Source Information**, use the drop-down arrow to select a value for **Responsible Reporting Structure** from the list provided. This is the District Office that you are contracted with. 
3.10 Referral Source Detail	• In the section: **Referral Source Information**, enter text in the field provided for **Referral Source Detail**. 
3.11 Organization Name	• In the section: **Referral Source Information**, enter text in the field provided for **Organization Name.**
3.12 Referral Notes	• In the section: **Referral Notes and Attachments**, enter text in the field provided for **Please describe the services you are requesting**. 

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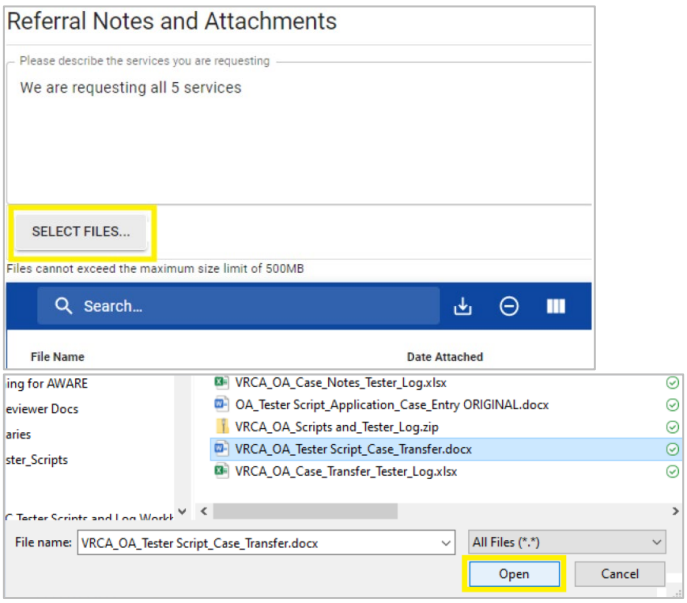
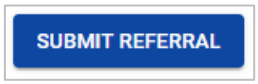
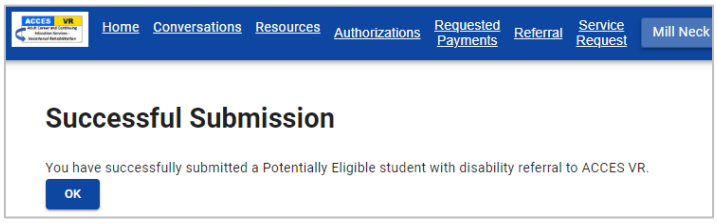
Activity Name	Testing Procedure Notes
3.13 Select Referral Attachment	• In the section: **Referral Notes and Attachments**, use the **SELECT FILES** button to launch a *Windows Explorer*. Select a file (*up to 500MB*) and click **Open**. 
3.14 Upload Attachment	• Complete the file attachment process by selecting **UPLOAD** once you have chosen a file.
3.15 Submit Referral	• At the bottom of the Referral page, click the **SUBMIT REFERRAL** button. 
3.16 Verify Successful Submission	• To verify and dismiss the **Successful Submission** notification, click **OK**. 

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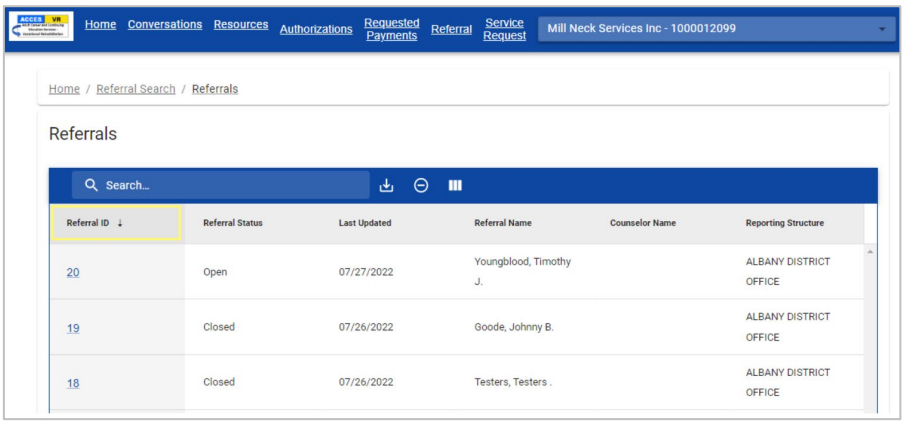
Activity Name	Testing Procedure Notes
3.17 Sort Referrals Grid	• Once you verify and dismiss the **Successful Submission** notification, the **Referral** page displays a grid listing your submitted referrals. Click the **Referral ID** column in the grid TWICE to *sort descending* and display your latest submission at the top. 

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