Vendor Portal – Request Payment

The step-by-step instructions below are provided for you to complete the process of a Requesting Payment on an authorization in the Vendor Portal. To display an authorization and Request Payment and review the requested information in the Vendor Portal, you will take the following path:

- 1. Login to Vendor Portal
- 2. Display Eligible For Payment Page
- 3. Select Request Payment
- 4. Complete the New Vendor Requested Payment Page
- 5. Submit Payment Request

Activity Name	Testing Procedure Notes					
Objective 1: Login to V	endor Portal					
1.01 Enter Email	 Using a <i>Chrome</i> browser, navigate to the Vendor Portal and enter your Email. 					
	• Enter your Password and click the Sign In button.					
	ACCES VR Adult Career and Continuing Education Services - Vocational Rehabilitation					
1.02 Enter Password	Sign in with your email and password Email robert.renda@nysed.gov Password 					
1.03 Terms and Conditions	A concept of a concept of a document of					

 1.04 Verify Portal Page Displays I.04 Verify Inst 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. I.04 Verify Portal Page Displays I.04 Verify Portal Page Displays 	Activity Name	Testing Procedure Notes									
1.04 Verify Portal page Displays Index V		continues to adapt fields and content, your page may not look exactly like									
1.04 Verify Portal page Displays Imme Conversations Resources Authorizations Resources Authorizations Resources Authorizations Resources Authorizations Resources Authorizations Resources Authorizations Resources Resource											
Ventor Verify Portal Page Displays Vendor Information System Message Most Recent Activity Vendor Name: Mill Neck Services inc Vendor Number: 1000012099 Phone: Email: Can be static or updateable for the vendor No recent activity											
Vendor Information System Message Most Recent Activity Vendor Name: Mill Neck Services Inc Vendor Number: 1000012099 Phone: Email: Can be static or updateable for the vendor Can be static or updateable for the No recent activity		Contressations resources Authorizations Referral Receives Mill Neck Services Inc - 1000012099									
Vendor Number: 1000012099 vendor Phone: Can be static or updateable for the Email: Can be static or updateable for the	rage Displays	Vendor Information	System Message	Most Recent Activity							
		Vendor Number: 1000012099 Phone:	vendor	No recent activity							

Objective 2: Requesting a Payment

- From the main menu along the top of the **Portal** page, click the link for **Authorizations** to display **Authorizations Navigation** items.
- Select Eligible for Payment to display the Authorization Details Eligible For Payment page and results grid.

ES VR Home Conversations Resources ter for administration	Authorizations Requested Payments Referral Request Mill Neck Services Inc - 1000012099						
Vendor Information	Authorization Search Open Authorizations Closed Authorizations	e	Most Recent Activity				
Vendor Name: Mill Neck Services Inc Vendor Number: 1000012099	Eligible for Payment	Vendor Requested Payments					
Phone: Email:	Can be static or u	ID	Service				
	vendor		<u>16</u>	Job Search Assistance			
			15	Assessment			

- 2.01 Display Eligible for Payment Page
- Authorization Details Eligible For Payment page and results grid displays.

Q Sea	rch		ų	έΘ 🚥							
Auth Nu	Detail Li	Contract	Name	Service	Descript	Amount	Current	Status	Begin D	End Date	Actions
<u>C943</u>	1	SED01- C013521- 3300200	Valdez, Juan	Assessm	120X Career Explorati Assessm	\$0.00	\$824.00	Open	5/6/2022	8/31/2022	REQUE
<u>C943</u>	2	SED01- C013521- 3300200	Valdez, Juan	Benefits Counseli	175X Benefits Advisem	\$0.00	\$54.59	Open	5/6/2022	8/31/2022	REQUE
<u>C966</u>	1	SED01- C013521- 3300200	Cookie, Oreo	Assessm	112X Commun Based Workplace Assessm	\$0.00	\$772.50	Open	5/17/2022	9/30/2022	REQUE

Activity Name

2.02 Select Request Payment

Testing Procedure Notes

Some authorizations may have more than one authorization item and this is indicated in the grid as a Detail Line Number. Select the Request
 Payment button for the Line Item to display the New Vendor Requested
 Payment page.

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Auth N	Detail L	Contra	Name	Service	Descrip	Amoun	Current	Status	Begin	End Date	Actions
10972	1	SED01- C011327- 3300200	Neuberg Michael F.	Assess	112X Commu Based Workplace Assess	\$850.00	\$510.00	Open	10/12/20	12/31/20	REQUE
<u>17904</u>	2	SED01- C013346- 3300200	Byrne, Dylan D.	Supported Employ Services	574X Support Job Placement Day 45	\$0.00	\$1,570.75	Open	1/22/2022	12/31/20	REQUE
<u>17904</u>	1	SED01- C013346- 3300200	Byrne, Dylan D.	Supported Employ Services	573X Supported Employ Job Placement Day 5	\$0.00	\$1,570.75	Open	1/22/2022	12/31/20	REQUE

• Note: You can also click the link for **Authorization Number** to display the **Authorization Detail** page which would have each line listed as well.

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Auth N	Detail L	Contra	Name	Service	Descrip	Amoun	Current	Status	Begin	End Date	Action
<u>10972</u>	1	SED01- C011327- 3300200	Neuberg Michael F.	Assess	112X Commu Based Workplace Assess	\$850.00	\$510.00	Open	10/12/20	12/31/20	REC
<u>17904</u>	2	SED01- C013346- 3300200	Byrne, Dylan D.	Supported Employ Services	574X Support Job Placement Day 45	\$0.00	\$1,570.75	Open	1/22/2022	12/31/20	REC

• Example showing the Authorization Detail page with Request Payment buttons for each Line Number:

Q Search		4	J ⊖ ≡					
Line Number	Service	Description	Amount Paid	Current Amount	Status	Begin Date	End Date	Actions
2	Supported Employment Services	574X SupportedEm Job Placement Day 45	\$0.00	\$1,570.75	Open	1/22/2022	12/31/2022	REQUEST PAYMENT
1	Supported Employment Services	573X Supported Employment Job Placement Day 5	\$0.00	\$1,570.75	Open	1/22/2022	12/31/2022	REQUEST PAYMENT

	Nequest Payment
Activity Name	Testing Procedure Notes
	 On the New Vendor Requested Payment page use the drop-down list to select the value "Invoice" for Request Type.
	Authorization Detail Number: 1
2.03 Select Request Type Invoice	Request Type Invoice
	Authorization Cancellation
	Invoice
	Monthly Report
	 Note: Required Fields became marked in red text when the Request Type of "Invoice" was selected.
	Invoice Number
	Invoice Number is required.
	Invoice Date
	Invalid Date Format
	Service Start Date
	mm/dd/yyyy
2.04 Turning Number	Service Start Date is required.
2.04 Invoice Number	Service End Date
	Service End Date is required.
	Amount Requested
	Amount Requested is required.
	 On the New Vendor Requested Payment page enter text into the field provided for Invoice Number
	Invoice Number
	INV 23-1454
	Use the calendar widget or enter a date in the field provided for Invoice
	Date.
2.05 Invoice Date	Invoice Date
	08/15/2022

	Request rayment
Activity Name	Testing Procedure Notes
2.06 Service Start Date	 Use the calendar widget or enter a date in the field provided for Service Start Date. Service Start Date Note: the system will not allow you to enter a date that precedes the authorization begin date. Service Start Date 08/01/2022 Service Start Date must be on or after 08/12/2022, the authorization begin date.
2.07 Service End Date	 Use the calendar widget or enter a date in the field provided for Service End Date. Service End Date 08/15/2022 Note: the system will not allow you to enter a date that precedes the authorization begin date. Service End Date 08/15/2022 Service End Date
2.08 Amount Requested	Enter a dollar amount in the field provided for Amount Requested Amount Requested S155
2.09 Comments	Enter text in the field provided for Comments. Comments Service was provided per contract.

	Request rayment
Activity Name	Testing Procedure Notes
	 In the section for Attachment, you can use the SELECT FILES button to browse for and choose a file. However, for this test scenario we want to verify that the drag and drop method is working. Open the File Explorer on your computer and browse for a sample file to test. Drag and drop your file from the location on your computer to the spot provided in the Attachment section.
2.10 Attachment	Set Asists RFP CMS-PSS-168 To-Be-Process March Guest in Charge Sessions v1.2.xlsx DataMigration DigSig CMS-PSS-168 To-Be-Process March Guest in Charge Sessions v1.2.xlsx Desktop Addiance Project Consolidated Master 02.09.21 Weekly Mee DigSig Comments To Documents To Documents <t< td=""></t<>
	Files cannot exceed the maximum size limit of 500MB
2.11 Verify Attachment	Verify that the Attachment is listed in that section. Attachment * SELECT FILES Wicks.txt 0.35 KB Files cannot exceed the maximum size limit of 500MB
2.12 Submit Payment Request	Select the SUBMIT button and then click OK on the message box at the top of the screen showing indicating Vendor Requested Payment read Submitted.
	Vendor Requested Payment Submitted