The step-by-step instructions below are provided for you to complete the process of a creating a Service Request in the Vendor Portal. To display an authorization and create a new Service Request in the Vendor Portal, you will take the following path:

- 1. Login to Vendor Portal
- 2. Search For Authorization
- 3. Create New Service Request
- 4. Verify Service Request Search Results

Activity Name	Testing Procedure Notes									
Objective 1: Login to V	Objective 1: Login to Vendor 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 AddrCaser and Continuing Education Services - Vecetional Rehabilitation									
1.02 Enter Password	Sign in with your email and password Email robert renda@nysed.gov Password Forgot your password? Sign in									
1.03 Terms and Conditions	<text></text>									

Activity Name	Test	ing Procedure No	tes								
	Verify that the Vendor continues to adapt fie the one shown.	r Portal home page disp lds and content, your pa	lays. Note: as NYSED age may not look exactly like								
	C 🗘 🔒 testnysedvendor.awareportals.com/signin B AEPP CaMS Testing Testing Testing Ed & Training MS ShareP VR Zendesk VR NYSED PORTAL IRA Confluence DevOps - Service D >> Confluence										
1.04 Verify Portal	Home Conversations Resources Authorizations	Home Conversations Resources Authorizations Requested Referral Service Request Mill Neck Services Inc - 1000012099									
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 Can be static or updateable for the vendor	No recent activity								
Objective 2: Search Fo	or and Display Authorization										
	 From the main menu a Authorizations to disp Select Authorizations and form. 	along the top of the Por blay Authorizations Nav Search to display the Au	tal page, click the link for i gation items. uthorization Search page								
	ACCES VR Ministrations Home Conversations Resources A	uthorizations Requested Payments Refer	ral <u>Service Request</u>								
	Select Vendor	Authorization Search Open Authorizations On	System Message								
	Mill Neck Services Inc - 1000012 👻	Closed Authorizations Eligible for Payment Phone: Email:	Can be static or updateable for the vendor Can be static or updateable for the vendor								
	• Verify that the Author	ization Search page and	l form displays.								
	Home Conversations Re	sources Authorizations Requested	Payments Referral Service Request								
2.01 Display Authorization	Home / Authorization Search										
Search Fage	Select Status	Open	•								
	Authorization Number										
	Contract Number										
	Last Name										
	First Name										
	Begin Date	mm/dd/yyyy 💼 Thru	mm/dd/yyyy								
	End Date	mm/dd/yyyy 🛅 Thru	mm/dd/yyyy								
	FIND AUTHORIZATIONS										

								Service	Nequest		
Activity Name			Testi	ng Pro	ocedu	re No	tes				
	 There are several criteria that you can use to limit your search for an authorization – including using the Select Status drop-down to look for Closed or Cancelled authorizations if necessary. For this test scenario use the Begin Date range criteria to limit your search results to two or four weeks from current date backward – adjust as needed. 										
2.02 Search Begin Date Range	Begin Date		11/2	8/2022	l	Th	ru [12	/05/2022	ä		
	End Date		mm/	dd/yyyy	l	Th	ru mr	m/dd/yyyy			
	FIND AUTHO	RIZATIONS									
Note: You can always us	e the link for O	pen Autho	orizatio	ns on m	ain mer	าน unde	r Autho	orization	s to bypass		
Home Conversation	ns Resources	Authoriza	ntions F	Requeste	ed Pavm	ents R	eferral	Service	Request		
		Author	ization S	Search							
		Open A	Authoriza	ations	ration S	Search /	Author	izations			
		Closed	Authori	zations			/ 10/11/01	Lationo			
		Eligible	e for Pay	ment	ons						
If you have no Open Aut	horizations at	all, contac	t: <u>vrsup</u>	port@n	ysed.go	<u></u>					
	Verify	that resu	lts have	popula	ted in a	grid on	the Au	thorizat	i ons page.		
	Home / Authorization Sea	arch / Authorization	<u>s</u>								
	Authorizations										
	Q Search			শ ⊝ ∎							
	Auth N Contrac	. Name	Case ID	Counse	Status	Balance	Begin D	End Date	Actions		
2.03 Verify Search Results Grid	<u>C1078</u> C01352 330020	Usr_9941, 1- Regrsn 0	2811	AT, VRC	Open	\$0.00	6/3/2022	8/3/2022	SERVICE REQUEST		
	SED01- C1085 C01352 330020	Usr_282 1- Regrsn 0	2890	AT, VRC	Open	\$78.58	6/6/2022	8/6/2022	SERVICE REQUEST		
	SED01- C1087 C01352 330020	Usr_205 1- Regrsn 0	2894	AT, VRC	Open	\$78.58	6/6/2022	8/6/2022	SERVICE REQUEST		
	SED01- C1088 C01352 330020	Usr_676 1- Regrsn	2895	AT, VRC	Open	\$78.58	6/6/2022	8/7/2022	SERVICE REQUEST		

Activity Name				Test	ing Pro	oced	ure No	tes			
	•	• If there are No Records Available , use the navigation provided at the top of the page to return to Authorization Search and use other criteria to find authorizations.									
	Home / Autho	rization Search /	Authorizations								
2.04 If No Records	Authorizat	ions									
Available	Q Sea	rch			⊎ Θ ■						
	Auth Nu	Contrac	Name	Case ID	Counsel	Status	Balance	Begin D	End Date	Actions	
					No re	cords available				*	
	14 A >	▶ 20 ▼	items per page							0 - 0 of 0 items	
	Home / Author	Using th The seq Descene	ne colum uence fo ding, No uthorizations	nn head or sorti 9 Sort .	ding for E ng is (as	Begin I you cl	Date , clio ick head	ck twice t ing): Asc	to sort I ending,	Descending.	
	Authoriza	ions									
2.05 Sort By Begin	Q Sea	rch		4	Θ						
Date Descending	Auth Numb	Contract N SED01-	Name	Case ID	Counselor	Status	Balance	Begin ↓	End Date	Actions	
	<u>C1486</u>	C013521- 3300200	Usr_59571, Regrsn	3296	Renda, Robert	Open	\$88.58	8/12/2022	8/31/2022	SERVICE REQUEST	
	C1178	SED01- C013521- 3300200	Usr_55411, Regrsn	3010	AT, VRC	Open	\$78.58	6/28/2022	8/28/2022	SERVICE REQUEST	
	<u>C1145</u>	SED01- C013521- 3300200	Usr_5091, Regrsn	2956	AT, VRC	Open	\$78.58	6/17/2022	8/17/2022	SERVICE REQUEST	
	•	Use the	Authori	ization	Number	r link ii	n the res	ults grid	to seleo	ct and	
	Home / Authori	zation Search / Auth		1011241		in page					
	Authorizati	ons									
	Q Searc	h		φ Ψ							
	Auth Number	Contract Nu	Name	Case ID	Counselor	Status	Balance	Begin ↓	End Date	Actions	
	<u>C1486</u>	SED01- C013521- 3300200	Usr_59571, Regrsn	3296	Renda, Robert	Open	\$88.58	8/12/2022	8/31/2022	SERVICE REQUEST	
2.06 Display Authorization	Home / Authori	ation Search / Auth	orizations / Autho	rization Detail (A	uth #1486]						
Detail	Authorizatio	on Detail [Auth	# C1486]								
	Authorization Nu Contract Numbe Participant Nam Case ID: 3296	mber: C1486 :: SED01-C013521-33 e: Usr_59571, Regrsn	800200								
	Q Searc	h		φ Θ	•						
	Line Number	Service Rehabilitation Technology	Description 165X Assis Tech/Rehal	Amou tive b \$0.0	unt Paid Curr	ent Amount	Status	Begin Date 8/12/2022	End Date 8/31/2022	Actions REQUEST PAYMENT	
	ia a 1	► N 20 ▼	Technology items per page	/ Eval						1 - 1 of 1 items	
	Back		-]	

Ac	tivity Name				Tes	ting P	rocedu	ure No	tes			
		• L	Jse the	navigatio	on lir	nks at th	e top of	the page	e or the l	ink for B	ack below	
		the details grid to return to Authorizations page.										
		Home / Authorization Search / Authorization Detail (Auth #1486)										
		Authorization	Detail [Auth	# C1486]								
2.07	Back To Authorizations	Authorization Number: C1486 Contract Number: SE001-0013521-3300200 Participant Name: Usr_59571, Regrsn Case ID: 3296										
	Page	Q Search			Ł	Θ						
		Line Number	Service	Description	A	mount Paid	Current Amount	Status	Begin Date	End Date	Actions	
		1	Rehabilitation Technology	165X Assistiv Tech/Rehab Technology E	ve S val	0.00	\$88.58	Open	8/12/2022	8/31/2022	REQUEST PAYMENT	
		N 4 1 >	⊨ 20 ¥	items per page							1 - 1 of 1 items	
		Back										
		• (Jnder th	ne Actio	ns co	lumn foi	r an autl	norizatio	n record	select th	ne Service	
		R	lequest	button	to di	splay the	e Service	Reques	t page.			
		Q Search			<u>ب</u> ج	⊝ ■						
		Auth Number	Contract Nu	Name	Case ID	Counselor	Status	Balance	Begin Date	End Date	Actions	
		C1078	SED01- C013521- 3300200	Usr_9941, Regrsn	2811	AT, VRC	Open	\$0.00	6/3/2022	8/3/2022	SERVICE REQUEST	
		Home / Autho	prization Sear	ch / <u>Authorizat</u>	ions / S	ervice Request						
		Participa	ant Inform	nation								
		Participant	Name									
		Originating	Authorization	Number								
2.08	Display Service	C1486 Date of Birth	n									
	Request Page	08/05/1965 Case ID										
		3296										
		Vendor I	nformatio	on								
		Mill Neck Se PO BOX 193	rvices Inc									
		MILL NECK	NY, 11765									
		Service	Request li	nformation					Factor and O	and Date		
		Service Req	uest Type		-	Area Where Se	rvices will be pr	ovided	→ Estimated S	/dd/yyyy		
		ADD SERV	CE									
		Service Ord		Convios SubO-t		Unito	inte Contra	at Control	t Commont Ota-t D	ata t-	nount Action	
		Service Cat	egory	Service SubCateg	ory	Units F	ate Contra	ici Contra	a segment start D	ate An	ACTION	
		Comments										

Activity Name	Testing Procedure Notes
	 In the section: Service Request Information, use the drop-down arrow to select a value for Service Request Type from the list provided.
2.09 Service Request	Service Request Information
i ypc	Authorization Amendment New Authorization
	 In the section: Service Request Information, use the drop-down arrow to select a value for Area Where Services will be provided from the list of locations.
	Area Where Services will be provided ALBANY DISTRICT OFFICE
2.10 Area Provided	ALBANY DISTRICT OFFICE
	BRONX DISTRICT OFFICE
	BROOKLYN DISTRICT OFFICE
	BUFFALO DISTRICT OFFICE
	GARDEN CITY DISTRICT OFFICE
	HAUPPAUGE DISTRICT OFFICE
2.11 Estimated Start Date	 In the section: Service Request Information, use either the date picker (calendar icon) or enter a value for Estimated Start Date in the field provided.

Activity Name	Testing Procedure Notes									
	In the section: Service Request Information, select the ADD SERVICE button to display the Add Service form.									
2.12 Display Add Service Form	Service Request Information Service Request Type Authorization Amendment ADD SERVICE									
	Add Service									
	Search Services Contract Services Imm/dd/yyyy									
	Service Category Service SubCategory									
	Select Service Category Service SubCategory Contract Contract Segment Start Date Rows per page: 5 - 0-0 of 0 (< < > >)									
	ADD CANCEL									

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Activity Name	Testing Procedure Notes
	 Use the Search button in the Search Services section to display the available service categories and subcategories.
	Add Service
	Search Services
	Contract Services
	Service Category - Service SubCategory
	SEARCH
	Select Service Category Service SubCategory Contract Contract Segment Start Date
	A00 CANCEL
2.13 Service Category	Search Services
Search	Contract Services
	Service Category Service SubCategory
	Select Service Category Service Subcategory Contract Contract Contract Segment start Late Potentially Eligible Pre-ETS 1005X Job Exploration Counseling
	Potentially Eligible Pre-ETS 1006X Instruction In Self-Advocacy
	Potentially Eligible Pre-ETS 1007X Workplace Readiness Training
	Potentially Eligible Pre-ETS 1008X Counsel PostSecondary Educ Opportunities
	Potentially Eligible Pre-ETS 1009X Work Based Learning Experience
	Rows per page: 5 ▼ 1–5 of 11 < <
	Select a Service Category and Service Subcategory by clicking the available checkbox in the Select column. Click the ADD button to add service. SEARCH Select Service Category Service SubCategory Contract Contract Segment Start Date
	Diagnosis and Treatment of Impairments 010X General Medical Exam
2 14 Select Service	Diagnosis and Treatment of Impairments 012X Functional Capacity Exam
	Diagnosis and Treatment of Impairments 020X Psychiatric Examination
	Diagnosis and Treatment of Impairments 030X Psychological Evaluation-Basic
	Diagnosis and Treatment of Impairments 034X Neuropsychological Evaluations
	Rows per page: 5 1−5 of 7 < < >
	ADD CANCEL

Activity Name	Testing Procedure Notes										
	Confirm that your service displays in the available grid.										
	Service Category Service Units Rate Contract Segment Start Amount Action Date										
2.15 Confirm Service Selection	Diagnosis and Treatment of Impairments 020X Psychiatric Examination Units are Rate is required DELETE										
2.16 Enter Units	Enter a value in the Units field where the display says Units are required field. Units 1										
2.17 Enter Rate	 Enter a value in the Rate field where the display says Rate is required field. Rate 										
2.18 Enter Comments	Enter Comments in the field provided. Comments Psych Exam is required before providing all other services.										
2.19 Attach File	 Attach a file by clicking the SELECT FILES button. Browse for a file and select the Open button to add upload your file. Attach supporting documents SELECT FILES Files cannot exceed the maximum size limit of 500MB NYSED Vak chat inn File name: wicks.txt All Files (*.*) Open Cancel III Verify that your file appears in the grid. 										
	Wicks.txt 0.35 KB Files cannot exceed the maximum size limit of 500MB										

Activity Name	Testing Procedure Notes
	 Select the SUBMIT SERVICE REQUEST button to finish and save the service request information.
	SUBMIT SERVICE REQUEST
2.20 Submit Service	Acknowledge the alert box to confirm submission.
Request	Service Request Submitted
2.21 Review Service Request Information	• Review Service Request Information including the Service Request ID, comments, Unit and Rate values. Service Request Information Participant Name Use, 99971, Regran Case ID Participant Name Use, 99971, Regran Case ID Participant Name Use, 9997 Participant Name Use, 9997 Participant Name Use, 9997 Participant Name Use, 9997 Participant Name Participant Na
	H 1 → H 20 ▼ items per page 1 - 1 of 1 items

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Activity Name			Test	ting Pro	ocedure	Notes		
	 Use Ree Vel 	e the navi quests an rify that y	gational l d results our Servi o	inks at the grid, ce Reques	e top of the st ID appea	e page to rs.	o go to the	e Services
	Home / Service Requ	est Search / Service Rec	quests	•				
	Service Reques	sts						
	Q Search		4	Θ				
	Service Request ID	Status	Service Request Ty	Request Date	Participant Name	Date of Birth	Case ID	Authorization Num
2.22 Review Service Requests Grid	1	Pending	Authorization Amendment	7/7/2022	Corday, Charlotte J.	7/13/1973	2298	C921
Requests onu	2	Pending	New Authorization	7/7/2022	Kelso, Michael	8/5/2004	2413	C1025
	3	Pending	New Authorization	8/4/2022	Corday, Charlotte J.	7/13/1973	2298	C921
	4	Pending	New Authorization	8/4/2022	Corday, Charlotte J.	7/13/1973	2298	C921
	5	Pending	New Authorization	8/9/2022	PoohC, Winnie	2/2/2001	2753	C1083
	8	Approved	New Authorization	8/11/2022	Birch, Mickey	5/6/2000	2907	C1165
	9	Pending	Authorization	8/12/2022	Usr_59571, Regrsn	8/5/1965	3296	C1486
		► 20 ¥ items ne	Amendment					1-8 of 8 ite
Ohiostino 2. Coonch	for Comi	D						
	for	Conversations Rest	ources Authorization	s <u>Requested</u> <u>Ref</u>	erral Service Mill M Request Service Request S	Neck Services Inc - Search	1000012099	
	for Under Name Vendor Name V	Conversations Reservations Reservations Reservations and formation ar: Mill Neck Services Integrations (1000012099)	Authorization	s Requested Ref System Messa Can be static of Can be static	ge rupdateable for the vendor vendor	Neck Services Inc - Search Most the No rece	1000012099 Recent Activity	•
	for Union Name Vendor Name Vendor Name Phone: Email:	Conversations Reso nformation :: Mill Neck Services Inter :: Mill Neck Services Inter : Mill Neck Service	Authorization	s <u>Requested</u> Ref System Messa Can be static o Can be static	ge Service Request s Service R	Neck Services Inc- Search Most the No rece	1000012099 Recent Activity	
3.01 Display Service	for Vendor In Vendor Numb Phone: Email:	m. Conversations Reso aformation :: Mill Neck Services Int :: Mill Neck	Authorization	s Requested Ref System Messa Can be static o Can be static	ge Service Mill 1 Service Request 5 Service Requ	Neck Services Inc - Search Most No rece	1000012099 Recent Activity Int activity	
3.01 Display Service Request Search Page	for Vendor In Vendor Name Vendor Name Phone: Email:	M. Sonversations Reso Information Mill Neck Services In- er: 1000012099 Home / Service Status Service Requ	Authorization	s Requested Red	ge ge or updateable for the vendor	Neck Services Inc Search Most the No rece	1000012099 Recent Activity Int activity	
3.01 Display Service Request Search Page	for Vendor Ir Vendor Name Phone: Email:	m. Conversations Reservations Reservations Mill Neck Services Integrations Home / Services Status Service Requinations Authorization	Authorization	s Requested Red System Messa Can be static of Can be static	ge service Request of ge or updateable for the vendor vendor	Neck Services Inc Search No rece	1000012099 Recent Activity Int activity	
3.01 Display Service Request Search Page	for Vendor Ir Vendor Name Vendor Name Email:	M. Sonversations Reso Information Mill Neck Services Inner Mill Neck Service Requires Authorization Participant List	Authorization Authorization Authorization c fice Request Sea i Number ast Name	s Requested Ref	ge Service Mill I Service Request s ge or updateable for the vendor	Neck Services Inc - Search Most the No rece	1000012099 Recent Activity	
3.01 Display Service Request Search Page	for Vendor la Vendor Name Vendor Name Vendor Name Email:	m. Sonversations Reservations aformation E: Mill Neck Services Integration E: Mill Neck Service Requires E: Mill Neck Se	Authorization	s Requested Red	ge Service Request service req	Neck Services Inc Search No rece	1000012099 Recent Activity Int activity	
3.01 Display Service Request Search Page	for Vendor In Vendor Name Phone: Email:	m. Sonversations Reservations Reservations Mill Neck Services In- mer: 1000012099 Home / Service Status Service Requinations Authorization Participant Li Participant Fill Date of Birth	Authorization Authorization s rice Request See est Type ast Name	s Requested Red System Messa Can be static of Can be static	Service Request of the render	Neck Services Inc- Search Most	1000012099 Recent Activity Int activity	
3.01 Display Service Request Search Page	for Vendor lar Vendor Name Phone: Email:	m. Sonversations Reservations information Mill Neck Services In- er: 1000012099 Home / Service Status Service Requinations Authorization Participant Li Participant Fill Date of Birth Case ID Contract National	Authorization	s Requested Red System Messa Can be static Can be static	Service Request Service Reques	Neck Services Inc Search No rece	1000012099 Recent Activity Int activity	
3.01 Display Service Request Search Page	for Vendor lar Vendor Name Phone: Email:	m. Sonversations Reservations Reservations i: Mill Neck Services Integrations Home / Service Requinations Status Service Requinations Authorization Participant Li Participant Fill Date of Birth Case ID Contract Num	Authorization	s Requested Red System Messa Can be static of Can be static	Attail Service Mill Service Request 6 Service Request 6 ge or updateable for the vendor or updateable for the vendor Service Request 6 ge Service Request 6	Neck Services Inc- Search Most No rece	1000012099	

Activity Name	Testing Procedure Notes								
	 Enter the Case ID of the participant you created the service request for in the field provided and select the FIND SERVICE REQUESTS button. 								
	Case ID 3296								
	 Verify results and use the navigational links at top of page to retur Service Request Search page and form. 	n to							
3.02 Verify Search by	Home / Service Request Search / Service Requests								
Case ID	Service Requests								
	Q Search								
	Service Reque Status Service Reque Request Date Participant Na Date of Birth Case ID Aut	norization							
	9 Pending Authorization 8/12/2022 Usr_59571, Regrsn 8/5/1965 3296 C14	186							
	i items per page	1 - 1 of 1 items							
	Enter the Authorization Number of the authorization you created service request for in the field provided and select the FIND SERVI REQUESTS button.	a CE							
	Authorization Number C1486								
3.03 Verify Search by	 Verify results and use the navigational links at top of page to retur Service Request Search page and form. 	n to							
Authorization Number	Home / Service Request Search / Service Requests								
Number	Service Requests								
	Q Search 🛃 💬 🗰								
	Service Reque Status Service Reque Request Date Participant Na Date of Birth Case ID Aut	vorization							
	9 Pending Authorization 8/12/2022 Usr_59571, 8/5/1965 3296 C14 Amendment Regran	186							
	H 4 1 + H 20 • items per page	1 - 1 of 1 items							

Activity Name	Testing Procedure Notes							
3.04 Verify Search by Service Request Type	•	Use the drop-down list for Service Request Type to indicate the type of service request and select the FIND SERVICE REQUESTS button.						
		Service Request	Туре А	Authorization Amendment				*
		Authorization Nu	umber	Authorization Amendment				
			N	ew Authorizatio	n			
	Verify results and use the navigational links at top of page to return to Service Request Search page and form. Home / Service Request Search / Service Requests							return to
								Service Requests
	Q Search			± ⊖ ≡				
	Service Requ	e Status	Service Reque	Request Date	Participant Na	Date of Birth	Case ID	Authorization
	1	Pending	Authorization Amendment	7/7/2022	Corday, Charlotte J.	7/13/1973	2298	C921
	9	Pending	Authorization Amendment	8/12/2022	Usr_59571, Regrsn	8/5/1965	3296	C1486
	н н	1 + + 20 •	items per page					1 - 2 of 2 items

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