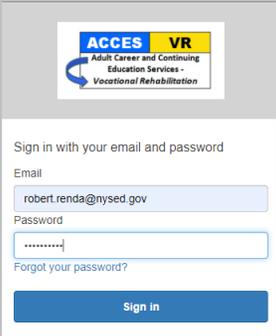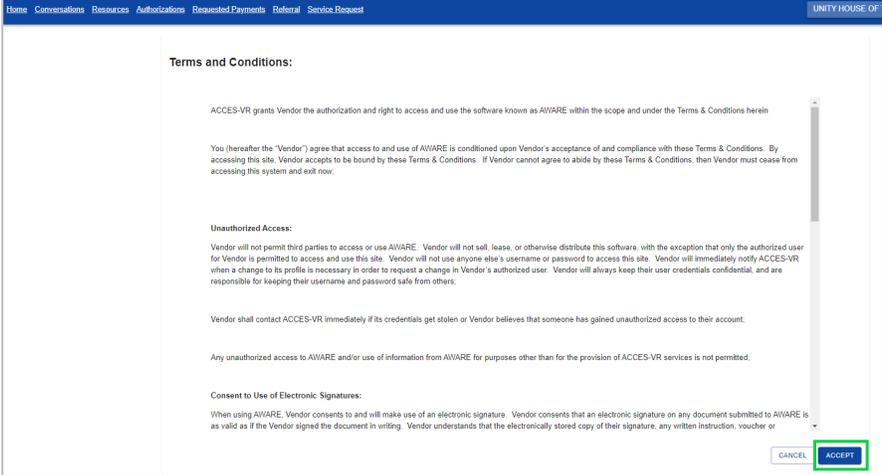# *Vendor Portal – Service Request*

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
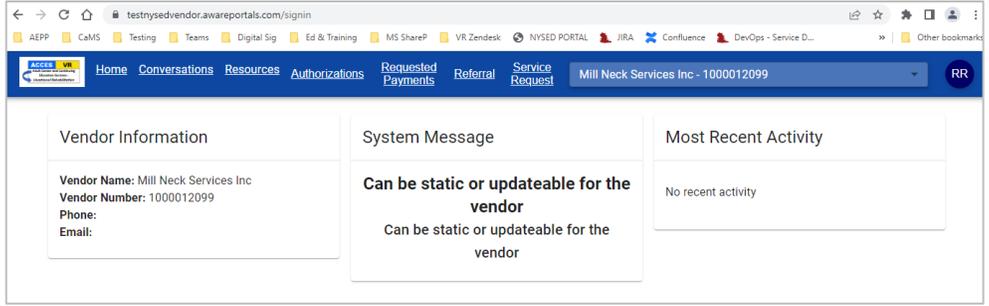4. Verify Service Request Search Results

Activity Name	Testing Procedure Notes
Objective 1: Login to 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.

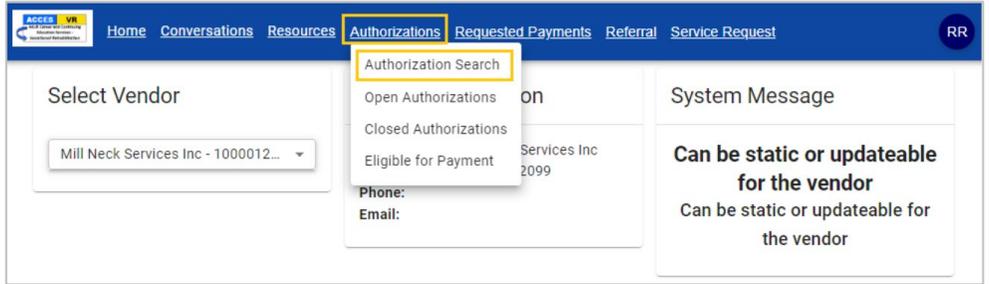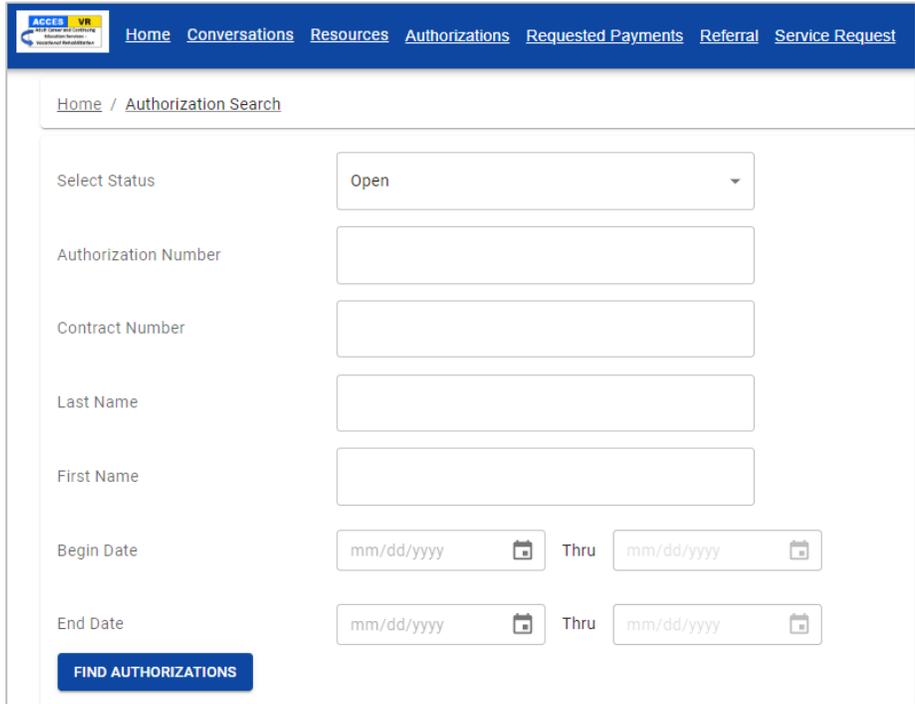| Activity Name	Testing Procedure Notes
1.04 Verify Portal Page Displays	• Verify that the **Vendor Portal** home page displays. Note: as NYSED continues to adapt fields and content, your page may not look exactly like the one shown.
Objective 2: Search For and Display Authorization	
2.01 Display Authorization Search Page	• From the main menu along the top of the **Portal** page, click the link for **Authorizations** to display **Authorizations Navigation** items. • Select **Authorizations Search** to display the **Authorization Search** page and form. • Verify that the **Authorization Search** page and form displays.

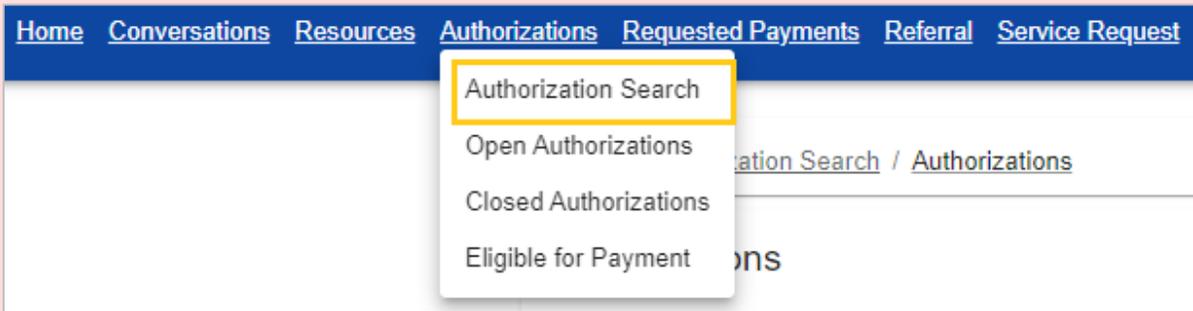| Activity Name	Testing Procedure Notes
2.02 Search Begin Date Range	• There are several criteria that you can use to limit your search for an authorization – including using the **Select Status** drop-down to look for **Closed** or **Cancelled** authorizations if necessary. For this test scenario use the **Begin Date** range criteria to limit your search results to two or four weeks from current date backward – adjust as needed.

Begin Date [11/28/2022] Thru [12/05/2022]

End Date [mm/dd/yyyy] Thru [mm/dd/yyyy]

FIND AUTHORIZATIONS

Note: You can always use the link for **Open Authorizations** on main menu under **Authorizations** to bypass

Home   Conversations   Resources   Authorizations   Requested Payments   Referral   Service Request

Authorization Search

Open Authorizations   ...ation Search / Authorizations

Closed Authorizations

Eligible for Payment   ...ns

If you have no **Open Authorizations** at all, contact: vrsupport@nysed.gov

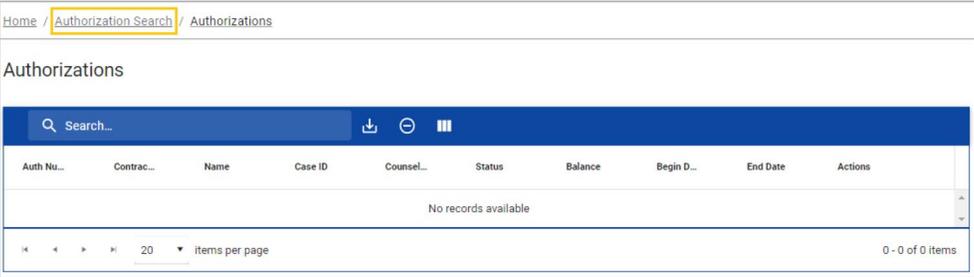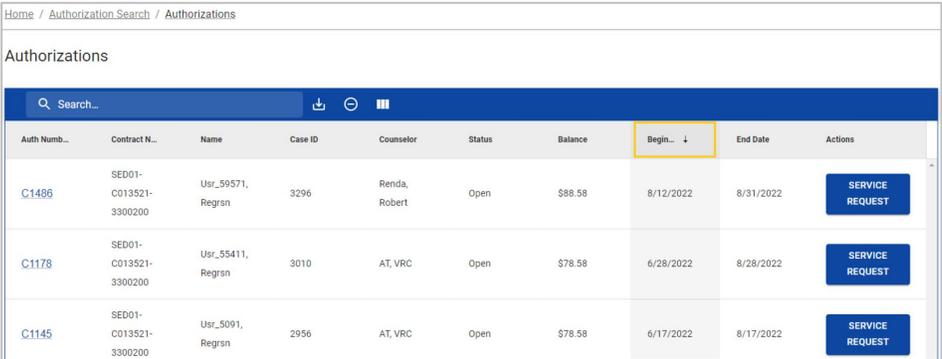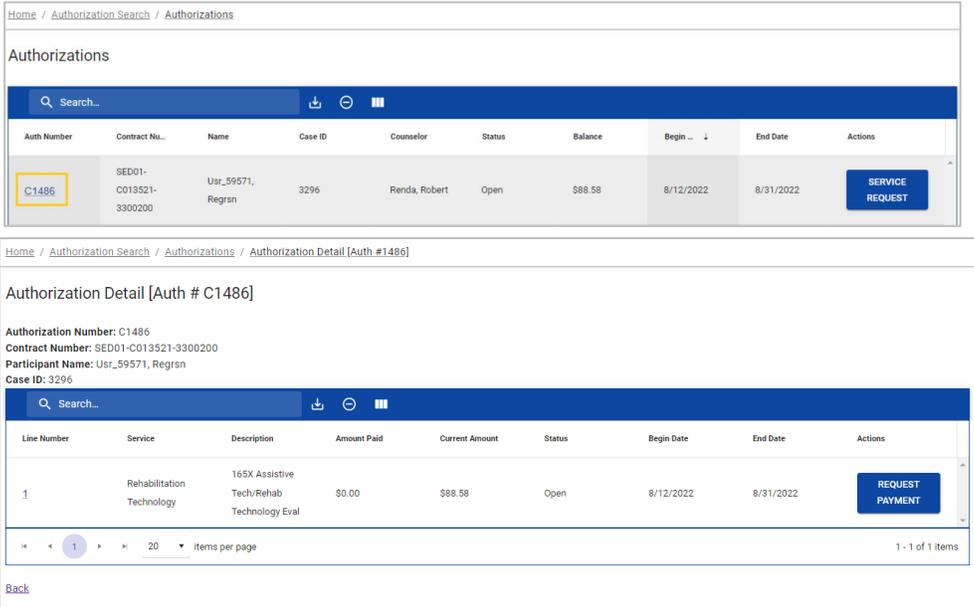| Activity Name	Testing Procedure Notes
2.03 Verify Search Results Grid	• Verify that results have populated in a grid on the **Authorizations** page.

Home / Authorization Search / Authorizations

Authorizations

Auth N...	Contrac...	Name	Case ID	Counse...	Status	Balance	Begin D...	End Date	Actions
C1078	SED01-C013521-3300200	Usr_9941, Regrsn	2811	AT, VRC	Open	$0.00	6/3/2022	8/3/2022	SERVICE REQUEST
C1085	SED01-C013521-3300200	Usr_282... Regrsn	2890	AT, VRC	Open	$78.58	6/6/2022	8/6/2022	SERVICE REQUEST
C1087	SED01-C013521-3300200	Usr_205... Regrsn	2894	AT, VRC	Open	$78.58	6/6/2022	8/6/2022	SERVICE REQUEST
C1088	SED01-C013521-3300200	Usr_676... Regrsn	2895	AT, VRC	Open	$78.58	6/6/2022	8/7/2022	SERVICE REQUEST

Activity Name	Testing Procedure Notes
2.04 If No Records Available	• 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.
2.05 Sort By Begin Date Descending	• Using the column heading for **Begin Date**, click twice to sort **Descending**. The sequence for sorting is (as you click heading): **Ascending, Descending, No Sort**.
2.06 Display Authorization Detail	• Use the **Authorization Number** link in the results grid to select and display the **Authorization Detail** page.

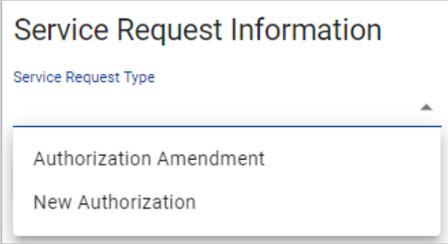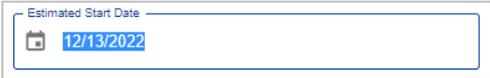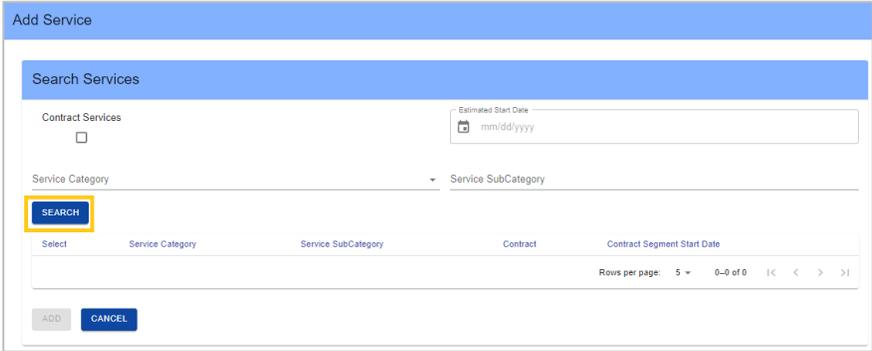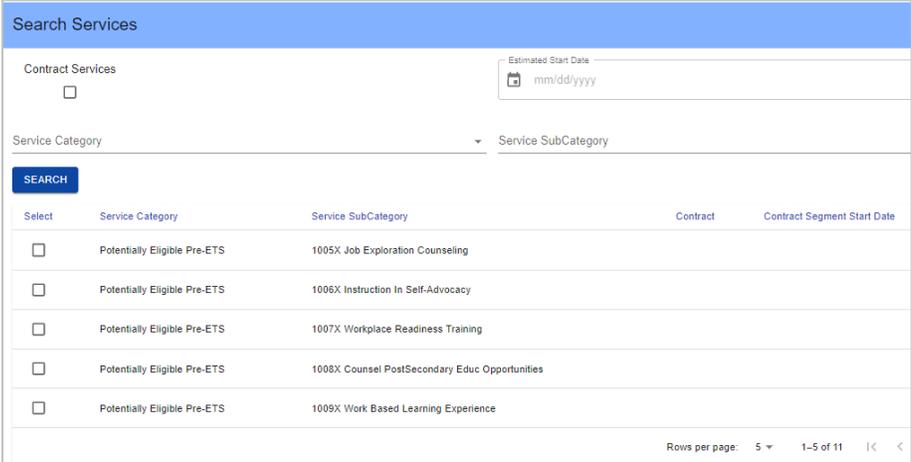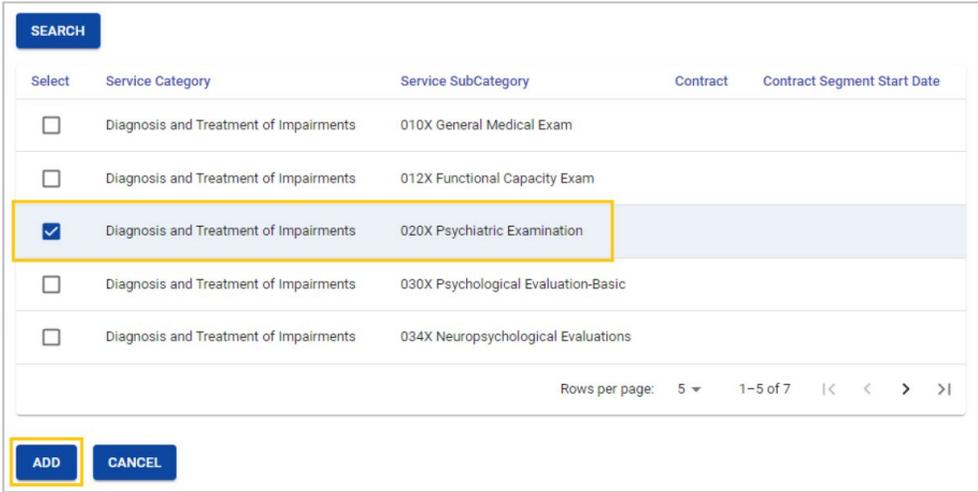| Activity Name	Testing Procedure Notes
2.07 Back To Authorizations Page	• Use the navigation links at the top of the page or the link for **Back** below the details grid to return to **Authorizations** page. Home / Authorization Search / Authorizations / Authorization Detail [Auth #1486] Authorization Detail [Auth # C1486] **Authorization Number:** C1486 **Contract Number:** SED01-C013521-3300200 **Participant Name:** Usr_59571, Regrsn **Case ID:** 3296 Search… 	Line Number	Service	Description	Amount Paid	Current Amount	Status	Begin Date	End Date	Actions
1	Rehabilitation Technology	165X Assistive Tech/Rehab Technology Eval	$0.00	$88.58	Open	8/12/2022	8/31/2022	REQUEST PAYMENT	 20 items per page 1 - 1 of 1 items Back
2.08 Display Service Request Page	• Under the **Actions** column for an authorization record select the **Service Request** button to display the **Service Request** page. Search… 	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 / Authorization Search / Authorizations / Service Request **Participant Information** **Participant Name** Usr_59571, Regrsn **Originating Authorization Number** C1486 **Date of Birth** 08/05/1965 **Case ID** 3296 **Vendor Information** Mill Neck Services Inc PO BOX 193 MILL NECK NY, 11765 **Service Request Information** Service Request Type Area Where Services will be provided Estimated Start Date mm/dd/yyyy ADD SERVICE | Service Category	Service SubCategory	Units	Rate	Contract	Contract Segment Start Date	Amount	Action | Comments

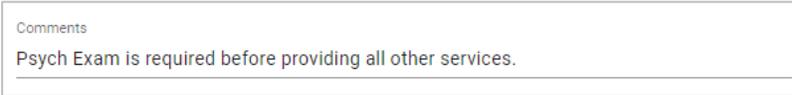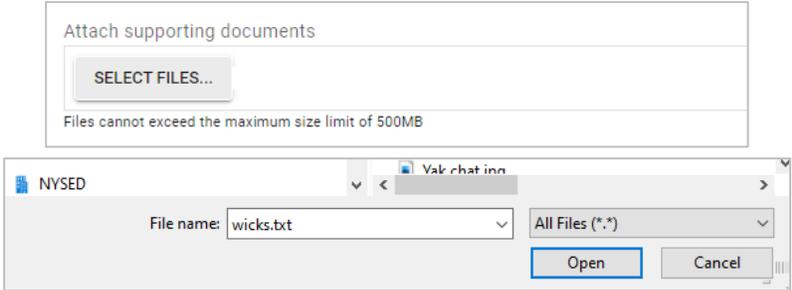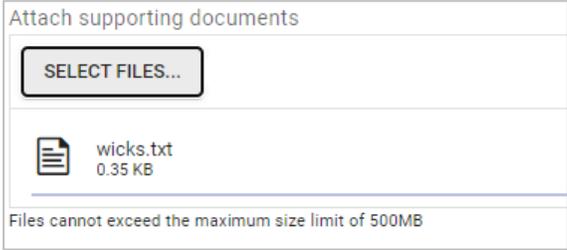| Activity Name	Testing Procedure Notes
2.09 Service Request Type	• In the section: **Service Request Information**, use the drop-down arrow to select a value for **Service Request Type** from the list provided. Service Request Information Service Request Type Authorization Amendment New Authorization
2.10 Area Provided	• 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 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. Estimated Start Date 📅 12/13/2022

Activity Name	Testing Procedure Notes
2.12 Display Add Service Form	• In the section: **Service Request Information**, select the **ADD SERVICE** button to display the **Add Service** form. ![Add Service form screenshot] Service Request Information Service Request Type: Authorization Amendment Area Where Services will be provided: ALBANY DISTRICT OFFICE Estimated Start Date: 08/17/2022 ADD SERVICE Add Service Search Services Contract Services ☐ Estimated Start Date: mm/dd/yyyy Service Category Service SubCategory SEARCH Select Service Category Service SubCategory Contract Contract Segment Start Date Rows per page: 5 0–0 of 0 |< < > >| ADD CANCEL

Activity Name	Testing Procedure Notes
2.13 Service Category Search	• Use the **Search** button in the **Search Services** section to display the available service categories and subcategories. **Add Service** Search Services Contract Services ☐ — Estimated Start Date mm/dd/yyyy Service Category ▾ — Service SubCategory **SEARCH** Select / Service Category / Service SubCategory / Contract / Contract Segment Start Date Rows per page: 5 ▾ 0–0 of 0 |< < > >| **ADD CANCEL** Search Services Contract Services ☐ — Estimated Start Date mm/dd/yyyy Service Category ▾ — Service SubCategory **SEARCH** Select / Service Category / Service SubCategory / Contract / Contract Segment Start Date ☐ 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 |< <
2.14 Select Service	• 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 ☐ 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
2.15 Confirm Service Selection	• Confirm that your service displays in the available grid. _[Grid showing: Service Category, Service SubCategory, Units, Rate, Contract, Contract Segment Start Date, Amount, Action. Row: Diagnosis and Treatment of Impairments, 020X Psychiatric Examination, Units are required, 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_ _175.50_
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 File name: wicks.txt All Files (*.*) Open Cancel_ • Verify that your file appears in the grid. _Attach supporting documents_ _SELECT FILES…_ _wicks.txt_ _0.35 KB_ _Files cannot exceed the maximum size limit of 500MB_

Activity Name	Testing Procedure Notes
2.20 Submit Service Request	• Select the **SUBMIT SERVICE REQUEST** button to finish and save the service request information. **SUBMIT SERVICE REQUEST** • Acknowledge the alert box to confirm submission. Service Request Submitted **OK**
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** Usr_59571, Regrsn **Case ID** 3296 **Date Of Birth** 08/05/1965 **Originating Authorization Number** C1486 **Service Request ID** 9 **Submitted Date** 08/12/2022 **Status** Pending **Result** n/a **Most Recent Comments** Psych Exam is required before providing all other services. Q Search… Service Request Li… / Unit / Service Category / Service SubCatego… / Rate / Contract / Contract Segment … / Amount 15 / 1 / Diagnosis and Treatment of Impairments / 020X Psychiatric Examination / $175.50 / / / $175.50 1 — 20 items per page — 1 - 1 of 1 items

Activity Name	Testing Procedure Notes
2.22 Review Service Requests Grid	- Use the navigational links at the top of the page to go to the **Services Requests** and results grid, - Verify that your **Service Request ID** appears.

Objective 3: Search for Service Request

Activity Name	Testing Procedure Notes
3.01 Display Service Request Search Page	Using the **Service Request Search** link on the main menu of the Vendor Portal, display the Service Request Search page and Find Service Requests form.

Activity Name	Testing Procedure Notes
3.02 Verify Search by Case ID	• 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 return to **Service Request Search** page and form. Home / Service Request Search / Service Requests Service Requests Q Search… Service Reque… / Status / Service Reque… / Request Date / Participant Na… / Date of Birth / Case ID / Authorization … 9 / Pending / Authorization Amendment / 8/12/2022 / Usr_59571, Regrsn / 8/5/1965 / 3296 / C1486 1-1 of 1 items
3.03 Verify Search by Authorization Number	• Enter the **Authorization Number** of the authorization you created a service request for in the field provided and select the **FIND SERVICE REQUESTS** button. Authorization Number C1486 • 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 Service Requests Q Search… Service Reque… / Status / Service Reque… / Request Date / Participant Na… / Date of Birth / Case ID / Authorization … 9 / Pending / Authorization Amendment / 8/12/2022 / Usr_59571, Regrsn / 8/5/1965 / 3296 / C1486 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 Type: Authorization Amendment — Authorization Amendment — New Authorization Authorization Number • 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 **Service Requests** | Service Reque...	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	 1 20 items per page 1 - 2 of 2 items