

Reviewing Draft Authorizations in Vendor Portal

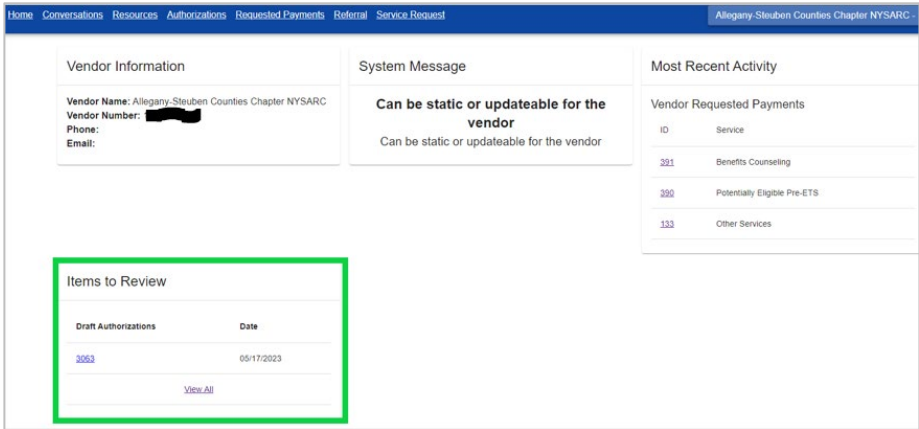
The step-by-step instructions below demonstrate the process of reviewing a **Draft Authorization in the AWARE Vendor Portal**, and the steps to accept, reject, or to leave comments for VR staff.

Note:

- **Only Vendors with appropriate draft authorization permissions will have access to this process. If a new user needs to be configured, please email VRSupport@nysed.gov.**
- **Once the Draft Authorization is accepted or rejected by the Vendor, it will no longer appear in the Vendor Portal. In order to maintain a record of the submission, Vendors must download and save the attachment when opening the Draft Authorization in the vendor portal (step 1.3).**
- **Group authorizations (e.g., 1000X) do not currently display in the Vendor Portal, so these draft authorizations will be provided to vendors by email.**

Vendor Portal: Check Draft, Accept or Deny

Vendor Portal: See Updated Authorization

Activity Name	Procedure Notes
<p>Objective 1: Vendor Portal – Vendor checks draft, downloads copy, then leaves response and adds comments.</p>	
<p>1.01 Items to Review</p>	<ul style="list-style-type: none"> • Inside the Vendor Portal, vendors will now see an “Items to Review” section. This will list the draft authorizations that are sent to the vendor.  <p>The screenshot shows the Vendor Portal interface. At the top, there is a navigation bar with links: Home, Conversations, Resources, Authorizations, Requested Payments, Referral, Service Request. The user is logged in as 'Allegheny-Stouben Counties Chapter NYSARC'. Below the navigation bar, there are three main sections: 'Vendor Information' (showing Vendor Name: Allegheny-Stouben Counties Chapter NYSARC, Vendor Number: [redacted], Phone, and Email), 'System Message' (with a message: 'Can be static or updateable for the vendor'), and 'Most Recent Activity' (showing a table of Vendor Requested Payments with columns ID and Service). The 'Items to Review' section is highlighted with a green box and contains a table with columns 'Draft Authorizations' and 'Date', listing a single entry with ID '3063' and date '05/17/2023'. A 'View All' link is visible below the table.</p>
<p>1.02 Select Draft Authorization</p>	<ul style="list-style-type: none"> • From the Items to Review section, select a link to a drafted Authorization.

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Items to Review	
Draft Authorizations	Date
3063	05/17/2023

[View All](#)

- The **Draft Authorization Review** page will display. This shows the Customer's case information.

[Home](#) / [Draft Authorizations](#) / [Draft Auth Review \[Auth #3063\]](#)

Participant/Case Information

Participant Name
Catcher, Rain

Address
11 Garden Lane
Saratoga NY, 12019

Primary Phone
(564) 343-2435 [Cell]

Primary Disability
General Physical Debilitation

IPE Goal
n/a

Case ID
2839

Primary Counselor
Kane, Patrick

Counselor Email
patrick.kane@nysed.gov

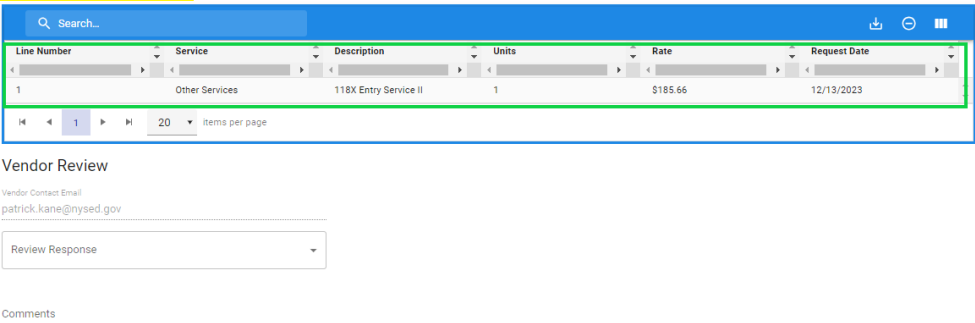
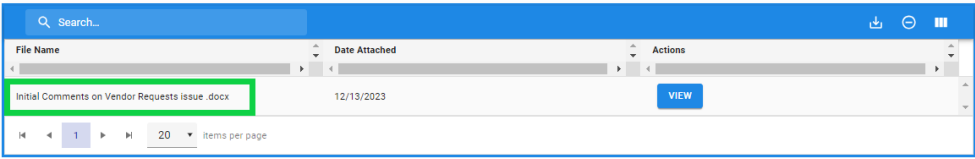
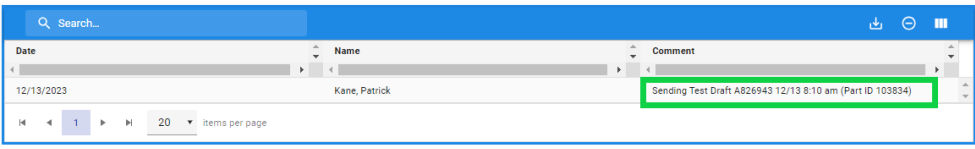
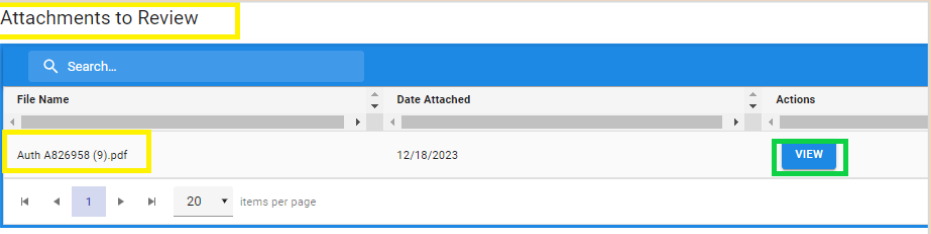
Caseload
PatrickK

Authorization Type
Contract

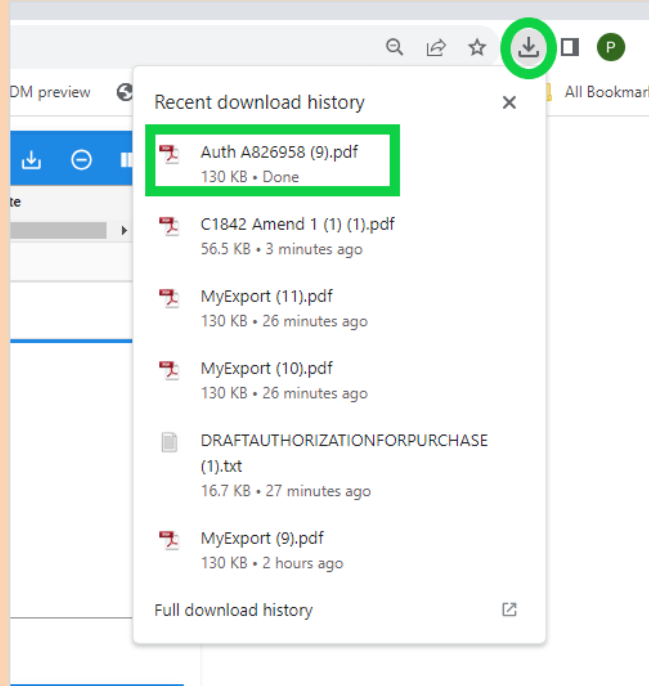
Service Being Requested

- At the bottom of the page, it also shows the **service being requested**, as well as any **attachments** and any **previous comments** that came through from the VR staff.

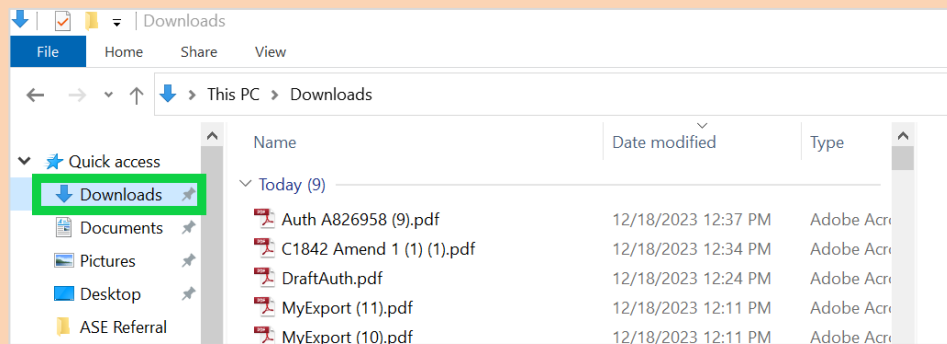
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	<p>Service Being Requested</p>  <p>Attachments to Review</p>  <p>Comment History</p>  <ul style="list-style-type: none"> • The vendor will review this information and then decide if the authorization can be accepted or not.
<p>1.03 Download Attached Authorization</p>	<ul style="list-style-type: none"> • Prior to accepting or rejecting the Draft Authorization, the Vendor needs to save the attached authorization file. Once the Draft Authorization is accepted or rejected, it will no longer display in the Vendor portal. • In the Attachments to Review section, select the View button. <p>Attachments to Review</p>  <ul style="list-style-type: none"> • The file should now be in your recent downloads. You can find it by selecting the Download arrow in the upper right corner of your browser.

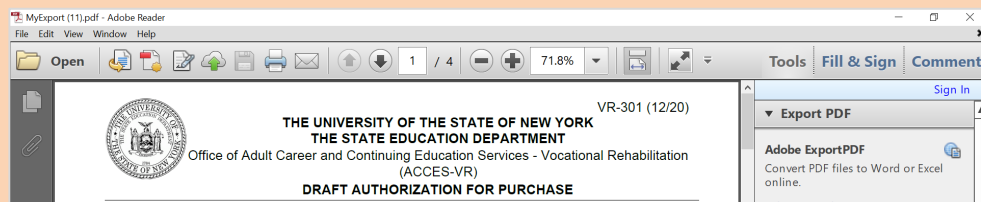
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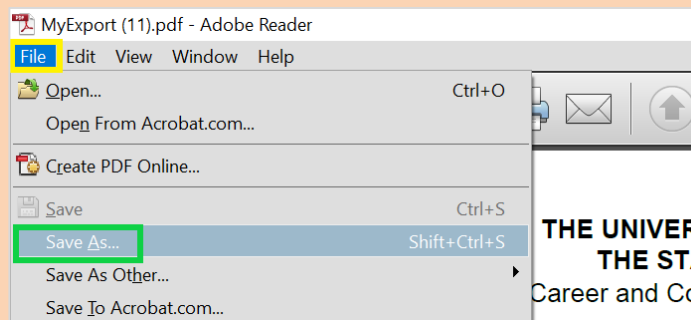
- You can also search your **downloaded files** in your file folder and select it from there.



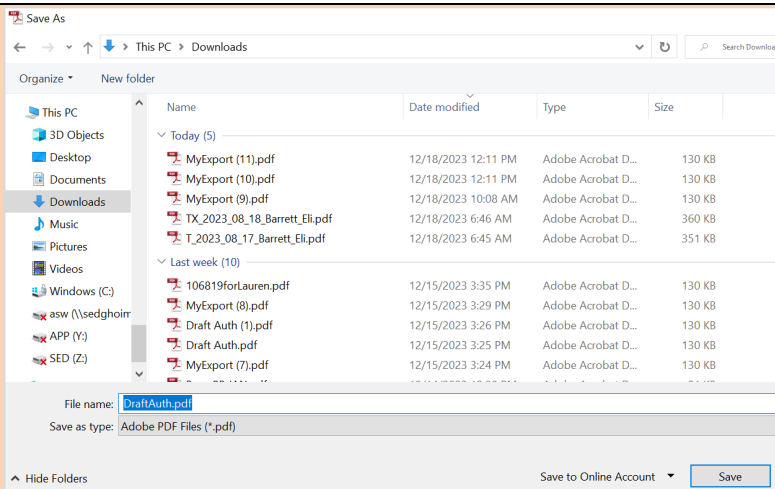
- Once you select the **Draft Authorization** file from your downloads the **Authorization** should open.



- Now you want to save the file to your computer.
- Select **File** → **Save As** and save the file with a name you will remember, such as the Authorization number.



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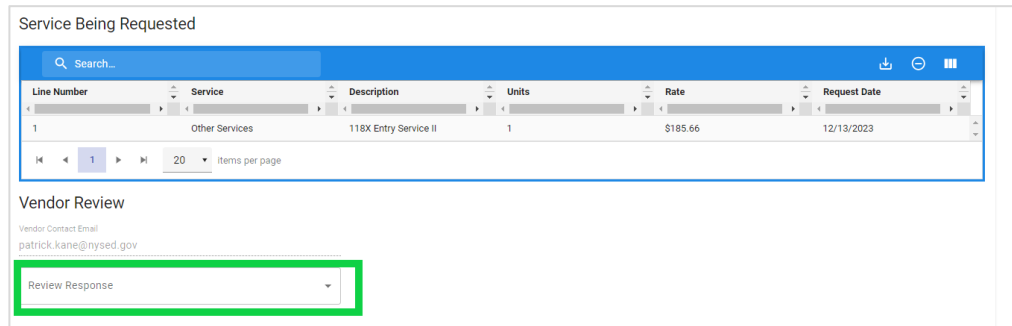


- Now you have a saved copy of the authorization and its details for your records.

NOTE: If the authorization were to get rejected and resubmitted with updates, this process would need to be completed again by the Vendor to save the updated attachment.

1.04 Accept or Reject Draft Authorization

- Below the **Service Being Requested** section, there is a **Vendor Review** section with a “Review Response” drop down.



- Vendors will use this drop down to decide if the services are **Accepted** or **rejected**.



- In the **Review Response** field, if vendors select “Rejected by Vendor”, an additional drop-down field will display titled, “Rejected Reason”, that will have different rejection options for the vendor to select.

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Review Response

Rejected by Vendor

Rejected Reason

Unable to provide this service at this time

Clarification Needed

Other Reason

Unable to provide this service at this time

- In the **Review Response** field, if vendors **approve** of the services being drafted, they will select “Accepted by Vendor”.

Review Response

Accepted by Vendor

- Vendor’s can leave a comment in the **Comments** field for VR staff to see.

Review Response

Accepted by Vendor

Comments

Looks Good please go ahead and issue

1.05 Submit Vendor Review for Draft Authorization

- Once the authorization has been reviewed and the vendor is satisfied with their review, they can select “**Submit**” to submit their response back to the VR staff in Aware.

Vendor Review

Vendor Contact Email
patrick.kane@nysed.gov

Review Response

Accepted by Vendor

Comments

Looks Good please go ahead and issue

Attachments to Review

Search...

File Name	Date Attached
DraftAuth.pdf	12/18/2023

1 20 items per page

SUBMIT

- **Note: The Vendor’s items to review are now updated and any drafts that they have reviewed and submitted will no longer show on the home screen or inside the vendor portal.**

Reviewing Draft Authorizations in Vendor Portal

Vendor Information
 Vendor Name: Allegany-Steuben Counties Chapter NYSARC
 Vendor Number: [REDACTED]
 Phone: [REDACTED]
 Email: [REDACTED]

System Message
Can be static or updateable for the vendor
 Can be static or updateable for the vendor

Most Recent Activity

ID	Service
321	Benefits Counseling
330	Potentially Eligible Pre-ETS
133	Other Services

Items to Review
 No items requiring review

Objective 2: Vendor Portal User Reviews Updated Draft or Open Authorization

2.01 Resubmitted Draft

- If VR staff **resubmit the draft** with new comments, the vendor will see it in their draft items to review. Just as they did on the first submission.

Items to Review

Draft Authorizations	Date
826943	12/13/2023

[View All](#)

- Inside of the Draft authorization, the vendor will see any updated comments and can select a new **Review Response**, add additional comments, and resubmit back to the VR staff.
- NOTE: Because VR staff have edited the authorization and resubmitted it to the vendor, the vendor MUST download and save the updated Draft Authorization attachment for their records (step 1.03).**

2.02 Issued Auth

- If VR staff **issues the authorization**, The vendor will find the Authorization within their **Open Authorization** search in the Vendor Portal.

Authorizations Search

- Open Authorizations
- Closed Authorizations
- Eligible for Payment
- Draft Authorizations

Authorizations Table

Auth Number	Contract Number	Name	Case ID	Counselor	Status	Balance	Begin Date	End Date
A826943	SED01-C0133...	[REDACTED]	300246	[REDACTED]	Open	\$185.66	12/13/2023	12/31/2023