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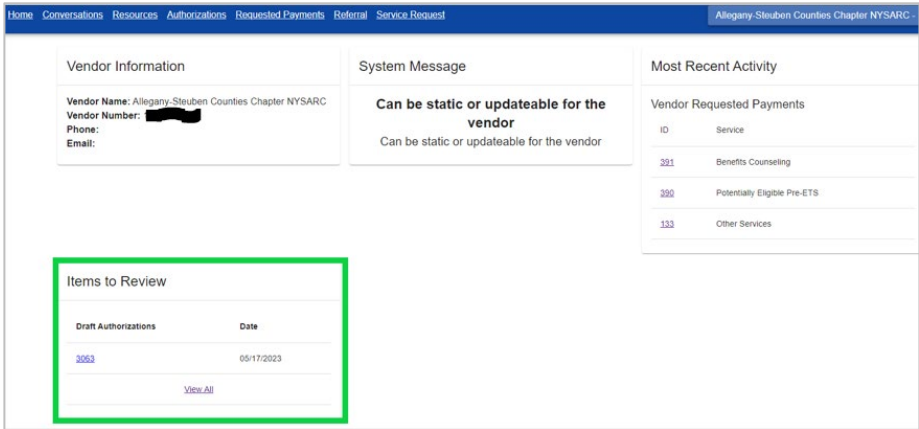
The step-by-step instructions below demonstrate the process of reviewing a **Draft Authorization in the AWARE Vendor Portal,** and the steps to accept, reject, or to leave comments for VR staff.

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
Objective 1: Vendor Portal – Vendor checks draft, downloads copy, then leaves response and adds comments.	
1.01 Items to Review	• 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.
1.02 Select Draft Authorization	• From the **Items to Review** section, select a link to a drafted Authorization.

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
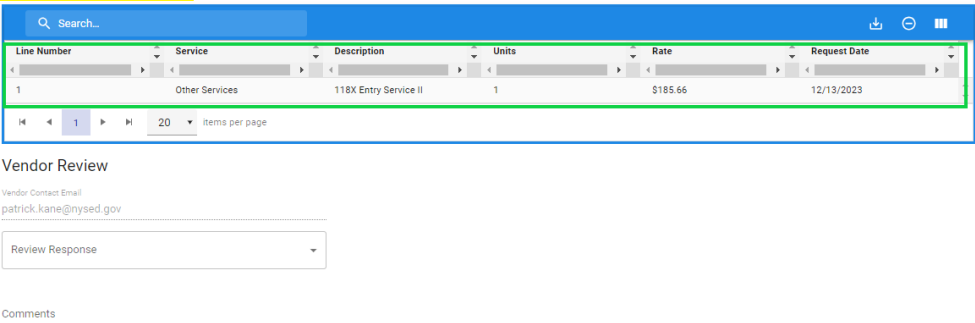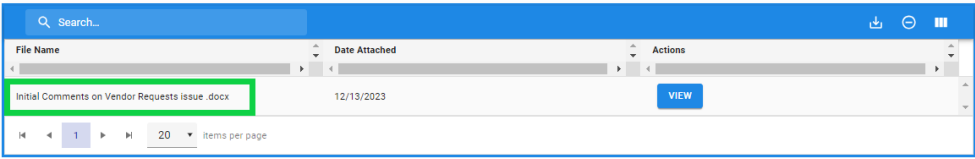Kane, Patrick
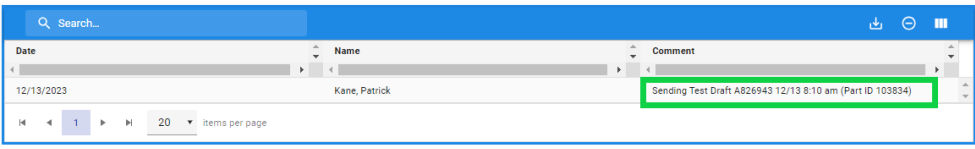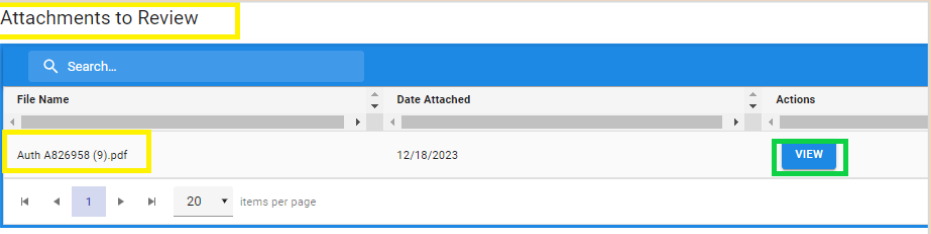
Counselor Email
patrick.kane@nysed.gov

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.

Service Being Requested

Line Number	Service	Description	Units	Rate	Request Date
1	Other Services	118X Entry Service II	1	$185.66	12/13/2023

Vendor Review

Vendor Contact Email
patrick.kane@nysed.gov

Review Response

Comments

Attachments to Review

File Name	Date Attached	Actions
Initial Comments on Vendor Requests issue .docx	12/13/2023	VIEW

SUBMIT

Comment History

Date	Name	Comment
12/13/2023	Kane, Patrick	Sending Test Draft A826943 12/13 8:10 am (Part ID 103834)

- The vendor will review this information and then decide if the authorization can be accepted or not.

| 1.03 Download Attached Authorization | • 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.

 Attachments to Review

 | File Name | Date Attached | Actions |
 |---|---|---|
 | Auth A826958 (9).pdf | 12/18/2023 | VIEW |

 • 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. |
|---|---|
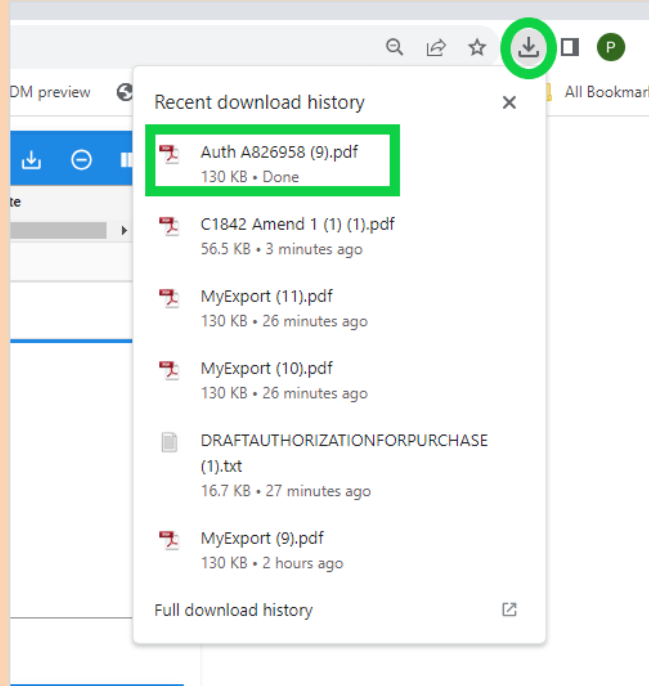
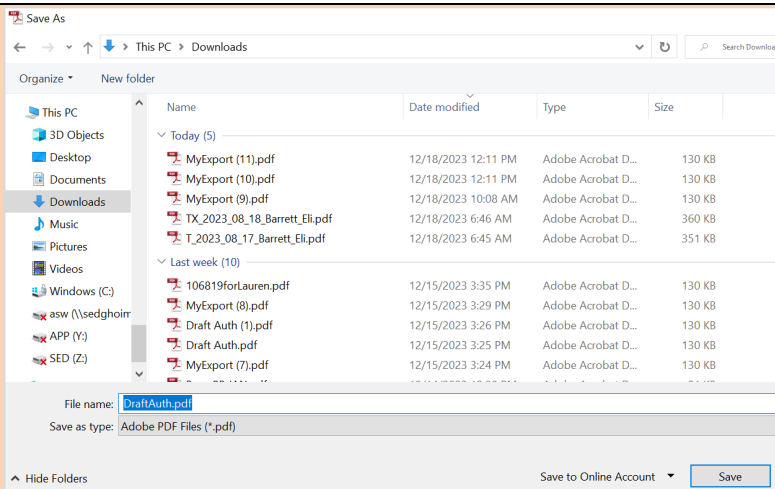- You can also search your **downloaded files** in your file folder and select it from there.
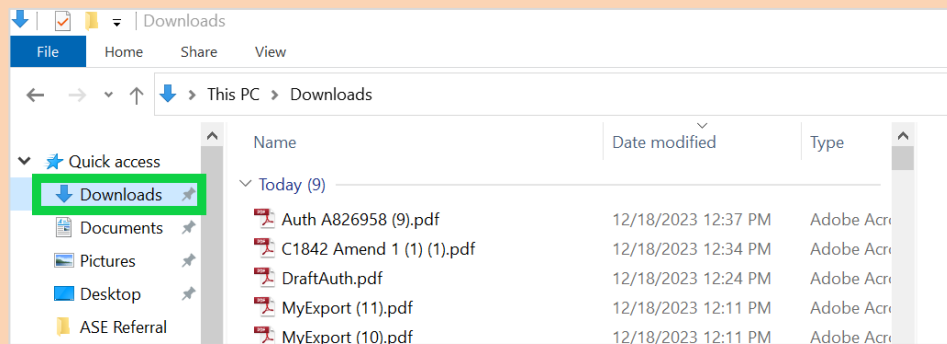
- Once you select the **Draft Authorization** file from your downloads the **Authorization** should open.
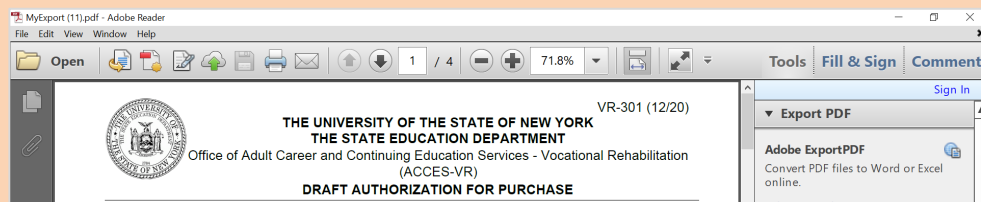
- Now you want to save the file to your computer.
- Select **File → Save As** and save the file with a name you will remember, such as the Authorization number.
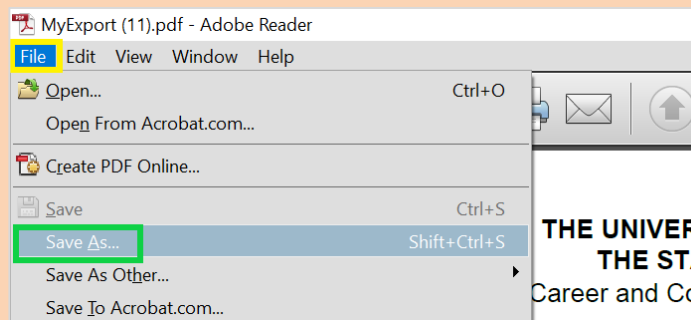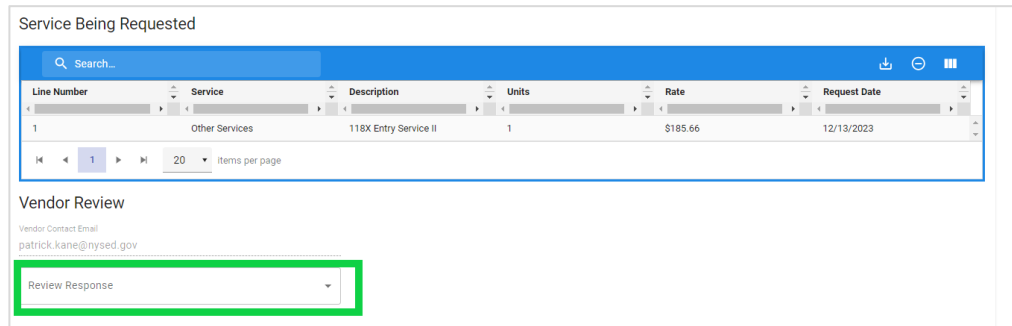
- Now you have a saved copy of the authorization and its details for your records.

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.

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

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

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. • **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.**

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. • 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.