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 <u>VRSupport@nysed.gov</u>.
- 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 Objective 1: Vendor Po comments.	Pr ortal – Vendor checks draft	ocedure Notes , downloads copy, the	n leaves response and adds
1.01 Items to Review	Inside the Vendo section. This will vendor.	or Portal, vendors will no list the draft authorizat	ow see an "Items to Review" ions that are sent to the
	Vendor Information Vendor Name: Allegary-Struben Counties Chapter NYSARC Vendor Number: Phone Email:	System Message Can be static or updateable for the vendor Can be static or updateable for the vendor	Most Recent Activity Vendor Requested Payments ID Service 201 Benefits Courseling 202 Puterstaay Eligate Pre-ETS 333 Other Services
	Items to Review Draft Authorizations Date 3063 05-17/2023 30esr.dll		
	Items to Review	Date	
	3063	05/17/2023	
1.02 Select Draft Authorization	From the Items t Authorization.	to Review section, selec	t a link to a drafted

Items to Review		
Draft Authorizations	Date	
3063	05/17/2023	
	View All	
The Draft Authoriza Customer's case info	t ion Review page will dis ormation.	play. This shows the
Home / Draft Authorizations / Dr	aft Auth Review [Auth #3063]	
Participant/Case Info Participant Name Catcher, Rain	mation	
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 Reque	sted	
 At the bottom of the well as any attachmore from the VR staff. 	page, it also shows the ents and any previous co	service being requested, as omments that came through

	Service Being Requested			
	Q Search			■ ⊝ ⊎
	Line Number Cristen Service	↓ ↓	Ç Rate ► <	C Request Date C C C C C C C C C C C C C C C C C C C
	1 Other Services	118X Entry Service II 1	\$185.66	12/13/2023
	H 1 H 20 V items per pag	je		
	Vendor Review			
	Vendor Contact Email patrick.kane@nysed.gov			
	Review Response			
	Comments			
	Attachments to Review			
	Q Search			⊎ ⊝ ш
	File Name	Date Attached	🗘 Actions	¢
	Initial Comments on Vendor Requests issue, doox	12/13/2023	VIEW	→
		12/10/2020		· · ·
	rtems per pag	je		
	SUBMIT			
	Comment History			
	Q Search			⊎ ⊝ ш
	Date	🗘 Name	🗘 Comment	¢
	12/13/2023	Kane, Patrick	Sending Test Draf	t A826943 12/13 8:10 am (Part ID 103834)
	I4 4 1 ► H 20 ▼ items per pag	je		
	- The worder wil			
	The vendor will	i review this informat	ion and then decid	de ir the authorization
	can be accepte	ed or not.		
.03 Download	 Prior to accept 	ing or rejecting the D	aft Authorization	, the Vendor needs to
Authorization	save the attach	ned authorization file.	Once the Draft A	uthorization is
	accepted or re	<mark>jected, it will no long</mark>	<mark>er display in the V</mark>	<mark>/endor portal.</mark>
	 In the Attachm 	nents to Review section	on, select the Viev	v button.
	Attachments to Review			
	Q Search			
	File Name	Date Attached		Actions
	Auth A826958 (9).pdf	12/18/2023		VIEW
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	rinde i ordero					
	ROW reco NOTE: If the process would attachment.	authorization were ald need to be comp	e to get reject pleted again b	ted and re by the Ven	submittee idor to sa	d with updates, this ve the updated
1.04 Accept or	 Belo 	w the Service Bein	g Requested	section, th	nere is a V	/endor Review
Reject Draft	sort	ion with a "Poview	Pernonse" di	ron down		
Authorization	Sect	IOII WILLI A REVIEW	Response u	iop down.		
	Service Being Requ	lested				
	Q Search					⊻ ⊖ ш
	Line Number	🗘 Service 🗘 Descri	ption 🍦 Units	÷	Rate	Request Date
	1	Other Services 118X E	Entry Service II 1	۶.	\$185.66	12/13/2023
		00 - H				
		20 • Items per page				
	Vendor Review					
	Vendor Contact Email					
	patrick.kane@nysed.gov					
	Review Response	•				
	•	Vendors will use th	is drop down	to decide	if the ser	vices are Accepted
		or rejected	•			•
	Vendor	Review				
	Vied	e Freed				
	Vendor Contac	t Email				
	patrick.kan	e@nysed.gov				
	- Review Res	ponse				
	Accepted	l by Vendor				
	1000 C					
	Accepted	d by Vendor				
	Rejected	by Vendor				
	 In th addi have 	e Review Respons tional drop-down f e different rejectior	e field, if vend ield will displant options for t	dors select ay titled, " the vendo	t "Rejecte 'Rejected r to select	ed by Vendor", an Reason", that will t.

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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". 					
	Accepted by Vendor					
	Vendor's can leave a comment in the Comments field for VR staff to see.					
	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					
	Looks Good please go ahead and issue					
	Attachments to Review					
	Q Search					
	File Name Date Attached					
	DraftAuth.pdf 12/18/2023					
	rems per page					
	SUBMIT					
	 Note: The Vendor's items to review are now updated and any drafts that they have reviewed and submitted <u>will no longer show on the home</u> 					
	screen or inside the vendor portal.					

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	Vendor Information	System Message	Most Recent Activity	
	Vendor Name: Allegany-Steuben Counties Chapter NYSARC Vendor Number: Phone: Phone: Email:	Can be static or updateable for the vendor Can be static or updateable for the vendor	Vendor Requested Payments ID Service	
			391 Benefits Counseling	
			390 Potentially Eligible Pre-ETS	
			133 Other Services	
	Items to Review			
	No items requiring review			
Objective 2: Vendor I	Portal User Reviews Updated	d Draft or Open Authorizati	on	
2.01 Resubmitted	If VR staff resubn	nit the draft with new comm	ents, the vendor will see it	
Draft	in their draft iten	ns to review. Just as they did	on the first submission.	
	Home Resources Authorizations Requested Payments Referral Service	e Request		
	Vendor Information	System Message	Most Recent Activity	
	Vendor Name: Allegany-Steub Vendor Number:	en Counties Chapter NYSARC Welcome to ACCES-VR's Aware	Vendor Portal. Vendor Requested Payments	
	Phone: Email:	Please contact <u>vrsupport@nysed.gov</u> for a	ID Service	
		below. This provide more guid Invoice Numbers and Uploading I do not require pay	Anothly reports that ment.	
		https://www.acces.nysed.gov/site vr-vendor-portal-fi	s/acces/files/vr/acces- q.pdf	
	Items to Review			
	Draft Authorizations	Date		
	Viewers	ew All		
	 Inside of the Draft au comments and can set 	ithorization, the vendor will s	see any updated	
	comments and result	omit back to the VR staff.		
	NOTE: Because VR sta	aff have edited the authoriza	tion and resubmitted it to	
	<mark>the vendor, the vend</mark>	or MUST download and save	the updated Draft	
	Authorization attach	ment for their records (step	<mark>1.03)</mark> .	
2.02 Issued Auth	• If VR staff issues the	authorization, The vendor w	ill find the Authorization	
	within their Open Au	thorization search in the Ve	ndor Portal.	
	Home Conversations Resources	Authorizations Requested Payments Referral	Service Request	
	Vendor Informa	t Open Authorizations System	stem Messa	
	Vendor Name: Allegar	Eligible for Payment ar NYSARC	Can be stat	
	Vendor Number: 1000 Phone:	Draft Authorizations		
	Authorizations		Can be statio	
	Q Search.		_ + 0 W_	
	Auth Number Contract 🚔 Name	Case ID Counselor Status	Balance Begin Date End Date I	
		300246 One	4 > 4 > 4 > 4 \$185.66 12/13/2023 12/31/2029 4	
	ACC0743	upen	12/13/2020 12/3//2023	