



Fax/Scan Guidance Remote Blended Learning (CSE/School)

Introduction

The chart below outlines the interim processes to use **when faxing and scanning external documents into SESIS is not available to school/CSE staff**. Follow the guidance related to the specific process to continue your work in SESIS, as needed. During remote/blended learning and school building closures, roles and responsibilities remain the same.

Note: To view resources linked in this guide, first [log in to the InfoHub](#) with your DOE Outlook Credentials.

Fax bypass: Some documents in SESIS include a "Fax bypass" function, which allows IEP teams to enter required information from external documents into SESIS and proceed with special education processes without faxing or scanning documents into the system.

Designated workaround: If Fax bypass is not available, use the designated workaround as specified in the chart below.

Fax/Scan: For documents that require faxing to move forward with a process but do not have Fax bypass functionality or a designated workaround, every attempt must be made to fax/scan SESIS documents using the school fax machine or ATS scanner. The fax email inbox may be used **only** when the entire IEP team has approved medical accommodations and/or is working remotely. Immediately send external documents to the applicable email inbox: For D.1-32, use publicschoolfaxrequest@schools.nyc.gov and for CSEs 1-10, use csefaxrequest@schools.nyc.gov. When forwarding a fax request, be sure to include the **student's name, NYCID #, DOB, public school DBN or CSE, and PDF version of the corresponding Fax Coversheet**.

Process Impacted	Process Guidance	Fax Guidance
Initial Referral: Completing an Initial Referral from a Parent	<ul style="list-style-type: none"> Principals will receive referrals from parents Create the Initial Referral document in SESIS, and complete <i>Notice of Referral: Initial</i> and the <i>Procedural Safeguards Notice</i> Upload the Parent Referral into the <i>Initial Referral</i> document: Click <i>Navigate To</i>, select <i>File Attachments</i>, click <i>Attach files</i> and upload the Parent Referral Verify the parent referral is attached Complete the Fax bypass: <i>Initial Referral Parent</i> section Finalize the <i>Initial Referral</i> document Print (Save as PDF) and send the <i>Notice of Referral: Initial</i> to the parent <p>SEGIS Resources: Referral for Special Education Eligibility Step-by-Step Guides: Completing a Request for Initial Referral for Staff, Completing a Request for Initial Referral by Principal/CSE Chairperson</p>	Fax bypass: <i>Initial Referral Parent</i>

<p>Reevaluation Referral: Completing a Request for Reevaluation from Parent or Other Source [e.g. Physician or Judicial Officer]</p>	<ul style="list-style-type: none"> • Create the Request for Reevaluation document, and select <i>Parent or Other Source</i> as the source of referral • Upload the Referral: <i>Click Navigate To</i>, select <i>File Attachments</i>, click <i>Attach files</i> and upload the Referral • Verify the referral is attached • Complete the Fax bypass: <i>Req. for Reeval-Parent/External</i> section • Reevaluation referrals from external sources other than the parent need to be set to review and approved/disapproved by the Principal/CSE Chairperson • Finalize the <i>Request for Reevaluation</i> document • If approved, create and complete the <i>PWN – Reevaluation</i> to send to the parent <p>SE SIS Resources: Major Workflows in SE SIS - Request for Reevaluation, Referral for Special Education Eligibility</p> <p>Step-by-Step Guides: Completing a Request for Reevaluation – Parent, Completing a Request for Reevaluation – External Source</p>	<p>Fax bypass: <i>Req. for Reeval-Parent/External</i></p>
<p>Additional Reevaluation Referral: Request for Additional Reevaluation from Parent or Other Source [e.g. Physician or Judicial Officer]</p>	<ul style="list-style-type: none"> • Create the Request for Additional Reevaluation document • Check the Referral Source: <i>Parent or Other Source [e.g. Physician or Judicial Officer]</i> • Fax/Scan: <i>Request for Additional Reevaluation – Parent/External</i> • After the referral appears as an attachment, set the <i>Request for Additional Reevaluation</i> status from draft to review • Principal/CSE Chairperson: review, approve/disapprove and finalize the <i>Request for Reevaluation</i> • If approved, create the <i>PWN – Additional Reevaluation</i> <p>SE SIS Resources: Major Workflows in SE SIS - Request for Additional Reevaluation, Referral for Special Education Eligibility</p> <p>Step-by-Step Guides: Completing an Additional Request for Reevaluation from Parent, Completing Request for Additional Reevaluation from an External Source, Reviewing Additional Request for Reevaluation for Principal/CSE Chairperson</p>	<p>Fax/Scan: <i>Req for Additional Reeval - Parent/External</i></p>
<p>PWN – Additional Reevaluation: Agreement for Additional Reevaluation (when parent is not the source)</p>	<ul style="list-style-type: none"> • If the <i>Request for Additional Reevaluation</i> was approved, Create and complete PWN – Additional Reevaluation • Complete the <i>Agreement for Additional Reevaluation</i>, the <i>Consent for Additional Assessments</i> (if applicable) for Reevaluation, and the <i>Procedural Safeguards Notice</i> sections • Print (Save as PDF) and send the <i>Agreement for Additional Reevaluation and Consent for Additional Assessments (if applicable)</i> to the parent to sign and return • Fax/Scan signed <i>Agreement for Additional Reevaluation</i> 	<p>Fax/Scan: <i>Agreement for Additional Reevaluation</i></p>

	<p>SE SIS Resources: Major Workflows in SE SIS - Request for Additional Reevaluation, Referral for Special Education Eligibility</p> <p>Step-by-Step Guides: Completing an Additional Request for Reevaluation from Parent, Completing an Additional Request for Reevaluation from School Staff, Completing Request for Additional Reevaluation from an External Source, Reviewing Additional Request for Reevaluation for Principal/CSE Chairperson, Saving a SE SIS Document as a PDF File</p>	
<p>Mandated Three Year Reevaluation: Request for Waiver of Mandated Three-Year Reevaluation</p>	<ul style="list-style-type: none"> • Create the Mandated Three Year Reevaluation document, add <i>Request for Waiver of Mandated Three Year Reevaluation</i>, and uncheck <i>PWN - Mandated Three Year Reevaluation</i> • Complete and send to the parent for consent • After consent* is returned, Fax/Scan into SE SIS • After the consent appears as an attachment, finalize the document <p>SE SIS Resources: Major Workflows in SE SIS - Mandated 3 Year Reevaluation Process, Referral for Special Education Eligibility</p> <p>Step-by-Step Guides: Completing the Request for Waiver of Mandated Three Year Reevaluation</p>	<p>Fax/Scan: <i>Request for Waiver of Mandated Three Year Reevaluation Consent*</i></p> <p>*PDF file of the email stating their permission to waive Mandated Three-Year Reevaluation</p>
<p>Reevaluation: Parent request to conduct additional assessments for a Reevaluation, Additional Reevaluation or Mandated Three Year Reevaluation</p>	<ul style="list-style-type: none"> • Parent requests additional assessments after the <i>PWN – Reevaluation</i>, <i>PWN – Additional Reevaluation</i> or <i>Mandated Three Year Reevaluation</i> was finalized • Fax/Scan request from parent to conduct additional assessments into the respective finalized <i>PWN – Reevaluation</i>, <i>PWN – Additional Reevaluation</i> or <i>Mandated Three Year Reevaluation</i> • After the parent request appears as an attachment, create and complete the <i>PWN – Parent Request for Additional Assessments</i> document <p>Note: You will not be able to create the <i>PWN – Parent Request for Additional Assessments</i> document until the parent request appears as an attachment to the finalized <i>PWN – Reevaluation</i>, <i>PWN – Additional Reevaluation</i> or <i>Mandated Three Year Reevaluation</i>.</p> <p>SE SIS Resources: Referral for Special Education Eligibility</p> <p>Step-by-Step Guides: Completing the PWN - Parent Request for Additional Assessment(s)</p>	<p>Fax/Scan: <i>Parental Request to Conduct Additional Assessments</i></p>
<p>Reevaluation: Consent for Additional Assessments (Assessments Needed) for a Reevaluation, Additional Reevaluation or Mandated Three Year Reevaluation</p>	<ul style="list-style-type: none"> • Assessments Needed are listed on the respective finalized <i>PWN – Reevaluation</i>, <i>PWN – Additional Reevaluation</i> or <i>Mandated Three Year Reevaluation</i> which is sent to the parent with the <i>Consent for Additional Assessments</i> and the <i>Procedural Safeguards Notice</i> • Designated workaround: After the parent returns consent for assessments, log two unique outreach attempts in the Events Log linked to the respective <i>PWN – Reevaluation</i>, <i>PWN – Additional Reevaluation</i> or <i>Mandated Three Year</i> 	<p>Designated workaround: <i>Consent for Additional Assessments</i></p>

	<p>Reevaluation (include the <i>Date and Time of Event</i>, and <i>Log Type = Mail or Phone Call</i>)</p> <ul style="list-style-type: none"> • Create the <i>Assessment Planning</i> document, on which “Two outreach attempts were recorded” will appear under the <i>Date of consent for new testing</i> and you will be able to proceed with evaluations <p>Note: If outreach is made via email, record the event log type as “Mail,” indicating an email was sent in the event description. Recording a log type of “Email” will not work as a unique outreach attempt.</p> <p>SEIS Resources: Referral for Special Education Eligibility Step-by-Step Guides: Logging Events in SEIS</p>	
<p>Reevaluation: Consent for Additional Assessments (DOE Agrees to Assessments) for a <i>PWN - Parent Request for Additional Assessment(s)</i></p>	<ul style="list-style-type: none"> • When a parent requests assessments after the Reevaluation PWN is finalized, they are listed on the <i>PWN - Parent Request for Additional Assessment(s)</i> which is completed and sent to the parent with the <i>Procedural Safeguards Notice</i>, and (if the DOE Agrees to at least one assessment) <i>Consent for Additional Assessments</i> • Designated workaround: After consent is returned, when additional assessments ARE listed on the <i>PWN – Reevaluation, PWN – Additional Reevaluation or Mandated Three Year Reevaluation</i>, log two unique outreach attempts in the Events Log linked to the respective <i>PWN – Reevaluation, PWN – Additional Reevaluation or Mandated Three Year Reevaluation</i> (include the <i>Date and Time of Event</i>, and <i>Log Type = Mail or Phone Call</i>) • Fax/Scan: When additional assessments are NOT listed on the <i>PWN – Reevaluation, PWN – Additional Reevaluation or Mandated Three Year Reevaluation</i>, fax/scan Parental consent into the <i>PWN - Parent Request for Additional Assessment(s)</i> <p>Note: If outreach is made via email, record the event log type as “Mail,” indicating an email was sent in the event description. Recording a log type of “Email” will not work as a unique outreach attempt.</p> <p>SEIS Resources: Referral for Special Education Eligibility Step-by-Step Guides: Logging Events in SEIS</p>	<p>Designated workaround: <i>Consent for Additional Assessments</i></p> <p>Fax/Scan: <i>Consent for Additional Assessments</i></p>
<p>Social History Package: (when the parent returns consent for the initial evaluation and also, for CSEs, HLIS when applicable)</p>	<ul style="list-style-type: none"> • Create the <i>Social History Package</i> and print the <i>Consent for Initial Evaluation</i> to provide to parent • After signed consent is obtained, complete the <i>Social History Package</i> • Upload the signed consent: Click <i>Navigate To</i>, select <i>File Attachments</i>, click <i>Attach files</i> and upload the signed consent • Verify the consent is attached 	<p>Fax bypass: <i>Consent for Initial Evaluation</i></p> <p>Fax bypass: <i>Home Lang. Identification Survey (if applicable)</i></p>

	<ul style="list-style-type: none"> • Complete the Fax bypass: <i>Consent for Initial Evaluation</i> section • For CSE's, if the <i>Home Language Identification Survey (HLIS)</i> has not been completed, upload the HLIS as a File Attachment and complete the <i>Fax Bypass: Home Lang. Identification Survey</i> section and finalize the <i>Social History Package</i> <p>SE SIS Resources: Referral for Special Education Eligibility Step-by-Step Guides: Completing a Social History Package, Saving Consent for Initial Evaluation as a PDF File</p>	
Initial Evaluation or Reevaluation: Evaluation(s) Provided by Parent/Prior Assessment	<ul style="list-style-type: none"> • Fax/Scan: External evaluation(s) provided by a parent/prior assessment must be faxed into the corresponding evaluation template in SESIS <p>SE SIS Resources: Evaluation Step-by-Step Guides: Quick Reference Guide: Assessment Planning for Initial Referral</p>	Fax/Scan: Evaluation(s)* Provided by Parent/Prior Assessment *PDF file version of the evaluation
IEP: Fax/Scan Attendance Page	<ul style="list-style-type: none"> • Designated workaround: The following documents can be finalized without faxing or scanning an attendance page into SESIS <ul style="list-style-type: none"> ○ Individualized Education Program (IEP) ○ Individualized Education Services Plan (IESP) ○ Services Plan (SP) ○ Declassification from Special Education Services ○ Ineligible for Special Education Services • Complete the attendance page in the IEP (check <i>Participated by telephone</i>) • Finalize the IEP <p>Note: When all participants participate by telephone, it is not necessary to upload or fax/scan the attendance page.</p> <p>SE SIS Resources: IEP Guides Processes and Resources Step-by-Step Guides: Individualized Education Program (IEP) Guide, Completing an Individualized Educational Service Plan (IESP) or Services Plan (SP) for Parentally Placed Students, Declassifying a Student in SESIS, Documenting a Student is Ineligible for Special Education Services</p>	Designated workaround: Finalize IEP
IEP: Fax/Scan Waiver of IEP Meeting to Amend IEP	<ul style="list-style-type: none"> • Create, complete, and finalize the Waiver of IEP Meeting to Amend IEP • Print the Waiver of IEP Meeting to Amend IEP as a PDF file • Send Waiver of IEP Meeting to Amend IEP to the parent via email • Fax/Scan: PDF of parent's permission* to waive the IEP meeting • After the waiver appears as an attachment in SESIS, you may proceed to amend the IEP 	Fax/Scan: Parent Permission* for Waiver of IEP Meeting to Amend IEP

	<p>Step-by-Step Guide: Amending an IEP with Waiver of a Meeting Video: Amending an IEP with a Waiver of IEP Meeting in SESIS Video</p>	<p>*PDF file of the email stating their permission to waive the meeting</p>
<p>Initial Placement: Prior Notice Package for Placement (when the parent returns consent/acknowledgment for the provision of services)</p>	<ul style="list-style-type: none"> • Create, complete and finalize the <i>Prior Notice Package for Placement</i> • Upon finalization, print (Save as PDF) and send the <i>Prior Notice Package for Placement and the Consent for Initial Provision of Services</i> to the parent • After consent is received, attach the signed consent by uploading to <i>Documents Related to Placement</i> • Open the <i>Prior Notice Package for Placement</i> document, and complete the Fax bypass: <i>Consent for Services - Initial</i> or the appropriate Fax bypass section • For initial referrals, click the link to create, and then complete and finalize the <i>Authorization to Attend</i> document to print (Save as PDF) and send to the parent <p>Note: If the <i>Prior Notice Package for Placement</i> was finalized before June 4, 2020, the Fax bypass section(s) will not be available. For these cases, Fax/Scan the consent/acknowledgment.</p> <p>SE SIS Resources: Placement Step-by-Step Guide: Faxing Written Parental Consent or Verbal Acknowledgement</p>	<p>Fax bypass*: <i>Consent for Services – Initial</i> (additional sections, as needed)</p> <p>*Unless finalized prior to June 4</p>
<p>Prior Notice Package for Placement/Parentally Placed (when the parent returns consent/acknowledgment for the provision of services)</p>	<ul style="list-style-type: none"> • Upon finalization, print (Save as PDF) and send the <i>Prior Notice Package for Placement/Parentally Placed and the Consent for Initial Provision of Services</i> to the parent • After consent is received, attach the signed consent by uploading to <i>Documents Related to Placement</i> • Open the <i>Prior Notice Package for Placement/Parentally Placed</i> document, and complete the Fax bypass: <i>Consent for Services – Initial</i>, or the Fax bypass: <i>Ack. of Services-Annual/Reevaluation</i> • If necessary, update the Admin DBN/School location field in the Student Enrollment Information section of the student profile with the school the student will be attending <p>Note: If the <i>Prior Notice Package for Placement/Parentally Placed</i> was finalized before June 4, 2020, the Fax bypass section(s) will not be available. For these cases, Fax/Scan the consent/acknowledgment.</p> <p>SE SIS Resources: Placement Step-by-Step Guide: Prior Written Notice for Placement Checklist for Parentally Placed Student, Saving a SESIS Document as a PDF File</p>	<p>Fax bypass*: <i>Consent for Services – Initial</i></p> <p>OR</p> <p>Fax bypass*: <i>Ack. of Services-Annual/Reevaluation</i></p> <p>*Unless finalized prior to June 4</p>

<p>Case Closing – Parent Revocation of Consent</p>	<ul style="list-style-type: none"> • Create the <i>Case Closing</i> document and select <i>Parent Revocation of Consent</i> as the case closing reason • Complete the <i>Parent Withdrawal of Consent</i> section, and then print (Save as PDF) and send the letter to the parent to sign and return • After the parent provides written consent, upload the signed withdrawal of consent letter into the <i>Case Closing</i> document: Click <i>Navigate To</i>, select <i>File Attachments</i>, click <i>Attach files</i> and upload the letter • Verify the document is attached • Complete the Fax bypass: <i>Parent Revocation of Consent</i> section • Add and complete the <i>Parent Revocation – Notice of Termination</i> section • Print the <i>Parent Revocation – Notice of Termination</i> to allow the <i>Case Closing</i> document to be finalized – Do not send to Parent without a Date – the date populates upon finalization • Finalize the <i>Case Closing</i> document • Print (Save as PDF) and send the <i>Parent Revocation – Notice of Termination</i> to the parent • If, prior to the <i>Effective (Termination)</i> date, the parent decides to rescind the <i>Revocation of consent</i>, upload the parent rescind letter to <i>Documents Related to Placement</i> • Complete the Fax Bypass: <i>Parent Rescinded Rev. of Consent</i> section <p>SEIS Resources: Special Circumstances Step-by-Step Guide: Withdrawal of Consent for the Provision of Special Education Services</p>	<p>Fax bypass: <i>Parent Revocation of Consent</i></p> <p>Fax bypass: <i>Parent Rescinded Revocation of Consent</i> (if applicable)</p>
<p>State Supported School Acceptance – 4201</p>	<ul style="list-style-type: none"> • Create the State Supported School Acceptance – 4201 document in SEIS • Fax/Scan: The State Supported School Acceptance – 4201 letter • After the State Supported School Acceptance – 4201 letter is attached, finalize the document 	<p>Fax/Scan: <i>State Supported School Acceptance – 4201 Letter</i></p>

Additional Notes

- All parent referrals should be sent to the Principal/CSE Chair who will direct these to the corresponding IEP team
- When it is not possible to print and mail documents to parents, you may follow steps for [Saving a SEIS document as a PDF file](#) and send via email (after obtaining consent for electronic mail from the parent)
- Although some documents may be finalized without attachments at this time, staff with access to a fax machine should fax in any required attachments as soon as possible, or by the end of the next business day

SEIS Fax/Scan Guidance Summary for Remote/Blended Learning or School Building Closure

Use Fax bypass:

- Initial Referral (Parent Referral)
- Request for Reevaluation (Referral)
- Social History Package (Consent for Initial Evaluation and Home Lang. Identification Survey)
- Prior Notice Package for Placement (Consent for Services – Initial and other sections as needed)
- Prior Notice Package for Placement/Parentally Placed (Consent for Services – Initial and Ack. Of Services – Annual/Reevaluation)
- Case Closing (Parent Revocation of Consent and Parent Rescinded Revocation of Consent)

Use the designated workaround:

- IEP Attendance Page: You are able to finalize the IEP without faxing/scanning the Attendance Page into SESIS
- Consent for Additional Assessments for the *PWN – Reevaluation, PWN – Additional Reevaluation and Mandated Three Year Reevaluation*: log two unique outreach attempts in the Events Log linked to the respective document
- Consent for Additional Assessments for the *PWN – Parent Request for Additional Assessments*: When assessments **are** listed on the *PWN – Reevaluation, PWN – Additional Reevaluation or Mandated Three Year Reevaluation* document, log two unique outreach attempts in the Events Log linked to the respective document

Documents that must be faxed/scanned:

Important: Every attempt must be made to fax/scan SESIS documents using the school fax machine or ATS scanner. The fax email inbox may be used **only** when the entire IEP team has approved medical accommodations and/or is working remotely.

- *Request for Additional Reevaluation: Referral*
- *Agreement for Additional Reevaluation: PWN – Additional Reevaluation* when the source of the referral is not the parent
- *Waiver of IEP Meeting to Amend IEP: Parent Permission for Waiver of IEP Meeting to Amend IEP*
- *Request for Waiver of Mandated Three Year Reevaluation: Request for Waiver of Mandated*
 - *Three Year Reevaluation Consent*
- External evaluation(s) provided by a parent/prior assessment must be faxed into the
 - corresponding evaluation template in SESIS
- Parent request to conduct additional assessments (fax/scan this request into the *PWN – Reevaluation, PWN – Additional Reevaluation or Mandated Three Year Reevaluation* to be able to create the *PWN – Parent Request for Additional Assessments* document)
- *Consent for Additional Assessments for PWN – Parent Request for Additional Assessments*: When assessments are **NOT** listed on the *PWN – Reevaluation, PWN – Additional Reevaluation or Mandated Three Year Reevaluation*, otherwise log two unique outreach attempts in the Events Log linked to the *PWN – Reevaluation, PWN – Additional Reevaluation or Mandated Three Year Reevaluation* document
- *State Supported School Acceptance – 4201: State Supported School Acceptance – 4201 Letter*