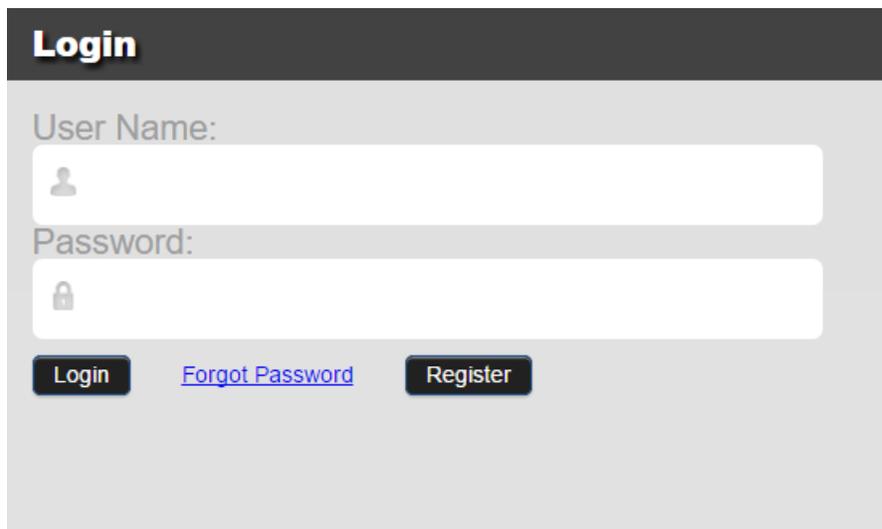


Educational Enterprises Service Request Portal

Educational Enterprises has moved towards an online solution to better handle our request intake and processing services. Below is a guide on how to begin using the portal.

Registration

1. To begin using the portal, please go to <https://eeservices.bergen.org>
2. For first time users, please click on the **REGISTER** button in order to have an account created for the request portal. If you already have an account, enter in the e-mail address and password you used to register with the portal and click login.



The screenshot shows a login interface with a dark header containing the text "Login". Below the header, there are two input fields: "User Name:" with a person icon and "Password:" with a lock icon. At the bottom, there are three buttons: "Login" (dark), "Forgot Password" (blue link), and "Register" (dark).

3. Please fill out all of the appropriate fields on the registration screen for your contact information and for your school district. Please note that the information for the school district is pre-populated, so you only have to look up your school district. Once you have filled out all of the fields, please click **SAVE AND CLOSE**. Your account will be sent to the Educational Enterprises staff in order for them to review and confirm your account.
4. Once your account has been verified, you will receive an e-mail with your account credentials for you to sign in. Please log in to begin using the portal.

Using the Portal

5. After you have logged in, you will be brought to the first page of the client dashboard. This will display any existing requests you have created and their current status. Below is a quick breakdown of what each status says and the description:

Status Type	Description
Draft	A request was created but has not been submitted to your Director of Special Services.
Pending Director Approval	The request is pending approval from your Director of Special Services.
Pending PH Approval	The request is pending approval from the Educational Enterprises director.
Pending DC Approval	The request is pending approval from the appropriate department coordinator.
Under Contract Review	The request has been approved by all previous personnel, and is pending contract generation and approval from the contract administrator.
Under Contract	The contract has been approved by both your district and Educational Enterprises and is currently active.

To create a new request, hover over the **TASK** button at the top left of the page and click on **CREATE NEW REQUEST**.



6. To begin the process of creating a new request, please select whether the request is for **DIRECT STUDENT SERVICES**, or for **PROFESSIONAL SERVICES**. Next, select the number of participants for the request. Finally, choose a service from the drop down menu, and select any sub-services related to your request. When you are completed, click the **CONTINUE** button. Here is an example of the form:

Create a New Request
✕

Request for: Direct Student Services Professional Services

of participant:

Select a Service: AT - Assistive Technology ▼

Select sub-service(s):

<input checked="" type="checkbox"/> Assistive Technology Evaluation
<input checked="" type="checkbox"/> AT Consultation
<input type="checkbox"/> Equipment Rental
<input checked="" type="checkbox"/> Ongoing Services
<input checked="" type="checkbox"/> Staff/Student Training
<input type="checkbox"/> Technology Class Instruction
<input checked="" type="checkbox"/> Other

Continue
Cancel

7. The next steps are to fill out the request form. Starting from the top, please **SELECT THE PERIOD OF WHICH THE SERVICE IS FOR**. The choice are for the current school year, the summer program, or for the next school year, as indicated by the years on the page.

Select Period(s): Sept 2017 ~ Jun 2018 Jul 2018 ~ Aug 2018 Sept 2018 ~ Jun 2019

8. The next step is to add a student (if applicable) in the **STUDENT'S NAME** field. By default, there will be no student information in the system, so you will need to input the student's basic information. Once you have saved the student's information, however, you will be able to use select that student in the future without having to re-enter all of the information.

To add a new student, begin typing in their name and select the **ADD NEW STUDENT** button if your student does not appear.

Once you have done that, please fill out the student information form. When you get to the **CASE MANAGER INFORMATION** field, you will need to input the case manager's information as well. As with the students, you will be able to re-use this information again later without having

to re-enter it.

9. The next steps are to complete the director's information and the contract administrator's information. The director is the person who will be receiving the evaluations and reports, while the contract administrator is the person who will be approving the request from your district. As with the students, you will be able to re-use this information again later without having to re-enter it.

The image shows a web form titled "Add Contact" with a close button in the top right corner. Below the title is a section header "Contact Person Info." followed by several input fields: "Title:" with a dropdown arrow, "First Name:" and "Last Name:" with text boxes, "Job Title:" with a text box, "Address:" with a text box, "City:" with a text box, "State:" with a dropdown arrow, "Zip:" with a text box, "Email:" with a text box, "Fax:" with a text box containing the placeholder "xxx-xxx-xxxx", "Telephone:" with a text box containing the placeholder "xxx-xxx-xxxx", and "Ext:" with a text box. At the bottom right of the form are two buttons: "Submit" and "Cancel".

10. The rest of the information on the form is dependent on the service and sub services that you selected. Various areas have a **COMMENTS** section where you can specify the type of services you are looking for. Please fill out the information according to your needs.

You can click the **REQUEST SERVICE** button at the bottom of the page to submit the request or you can click the **SAVE FOR LATER** button to complete the request later.

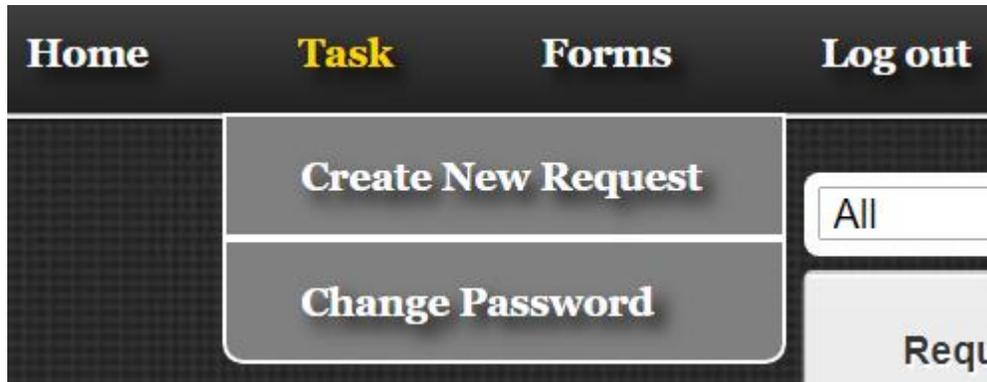
The image shows a summary bar at the bottom of the form. It contains the text "RequestID: 505 - Created on: 12/06/2016" in a light gray box. Below this are two dark blue buttons with white text: "Request Service" and "Save it For Later".

11. Once the request has been submitted, an e-mail will be sent to your contract administrator who can approve the request. Once the request has been approved, the Educational Enterprises staff

will be able to see and review the request with you to make sure all of your requested needs are met.

Changing your Password

If you wish to change the password that was generated for you, you can go to the **TASK** button at the top left of the client dashboard and select **CHANGE PASSWORD**.



You will be asked to enter in your old password and then create a new password. The new password must be at least 7 characters long, contain at least 1 number, and at least one upper case letter.

If you have any questions on how to complete a request or run into any issues, please contact eeservices@bergen.org or 201-343-6000 x6541.