Attendance Service Case Management System (AS-CMS) – current known issues and guidance for frequently asked questions

Contents

[UNCLASSIFIED]

High priority issues

The table below summarises current priority known issues following go-live of the AS-CMS, any workaround and indicative resolution timeline. Please note these timings may change.

This table only includes the highest priority issues. Other faults are handled as they are reported and will be prioritised based on impact.

Please continue to notify us of any technical issues you are experiencing by contacting the service desk Freephone: 0800 422 599 (NZ only) Email: service.desk@education.govt.nz

Name	Description and impact plus any workaround	Estimated date for resolution
Case Owners can't see previous cases	A Case Owner for an active case should be able to see all previous cases for the student. This is not working for cases that were already closed when they were migrated, because these cases are owned by the Queue and users with the Case Manager role are not able to see cases that are owned by the queue. Work is underway to make these cases visible to the current case owner of an active case for that child.	12/03
Error displaying intended school on NEN cases	When a NEN case is created in the AS-CMS via the ENROL integration (ie, a new case, not a migrated case), the supplied 'Intended school' does not appear on the support request. Instead, it appears in a field on the case record that is used for the current enrolled school, which implies that the student has enrolled. This field should be empty if the student is not enrolled. However when they do enrol, this field appears blank, instead of holding the current enrolled school. If the student has enrolled at a school outside the current catchment, this means that the Provider is not able to reallocate the case directly to the new Provider. Providers should follow the usual business process for reallocating (update notes, including information about the new school if this is not showing in the AS-CMS, contacting the new Provider for a handover) then reallocate the case to CIT, who will send it on to the new Provider.	12/03
ENROL integration –	Enrolment status and enrolment history are not updating for students who have no migrated cases.	12/03

Name	Description and impact plus any workaround	Estimated date for resolution
Enrolment Status	This means that the enrolment history, currently enrolled status and current school name are not populating correctly, and the 'reallocate – enrolled out of catchment' flow does not work for affected cases.	
Case Owner not updating when moving to Provider Queue	The case owner is not removed when the case is moved to Provider Queue in some cases. Since a case owner already exists, it is not possible to assign the case to a different person. Workflow Leads can continue to add case updates, if the original case manager is not available. Please contact the service desk to request a manual fix.	12/03
Unable to print student plan	Users are not able to print the student plan from the AS-CMS due to global platform update.	12/03

4 March 2026: Please note there is an active bug that is preventing many school users from entering the Primary Contact and completing the CA Request Form. We are urgently working to fix this.

Note – we're aware of a number of other lower priority issues that will be resolved over the coming weeks.

Additional process and user guidance for frequently asked questions

Here is a summary of additional guidance in response to frequently asked questions.

## *Sorting by Student Age and Case Age (added 2 March)*

When using list views and reports, the Case Age and Student Age fields can't be sorted in ascending or descending numerical order. Instead they are sorted alphabetically. This means, for example, that 1 is followed by 10, then 11, then 2, then 20 etc.

- Instead of sorting by Case Age, sort by Created Date. This may appear as Date/Time Created depending on the report type
- Instead of sorting by Student Age, sort by Student Birthdate. This may appear as Date of Birth or DOB depending on the report type

Please note that sometimes it is not possible to add birthdate to certain case reports.

Daily Attendance Data (added 23 February)

Making attendance data visible in AS-CMS is currently delayed. We will advise when this is live. Once it goes live the users will see it appear on additional tabs in the case record:
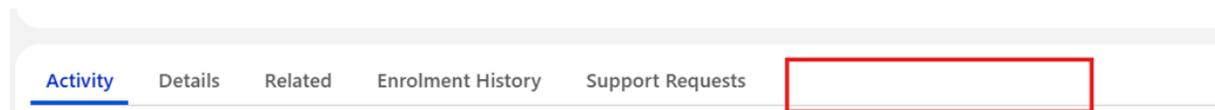
Please note that this function relies on schools submitting their daily attendance data to the Ministry. A small number of schools are not submitting daily attendance data, so it will not be available for students attending those schools.

Allocating cases to CIT (added 23 February)

Non-enrolled students

You may reallocate a case to CIT when you have a confirmed new address outside your catchment area.

If you do not have a confirmed address but have reasonable grounds to believe the student is now living in another catchment, contact the provider in that catchment to confirm whether they are willing to accept the case without full contact details.

If the other provider agrees, reallocate the case to CIT and include a case comment that:

- identifies which provider the case should go to, and
- confirms that the provider has agreed to accept it.

If you don't have a confirmed address and you don't have another provider's agreement, do not allocate the case to CIT. Instead:

- complete information checks
- continue to follow the operational guidance for hard-to-locate students here
- if all efforts fail to locate the student, apply the Not Located flag.

Incorrect Student Details (13 February)

The AS-CMS uses ENROL as its 'source of truth' for student details. If you notice errors in the child's name, date of birth or enrolment history, it means that the information has been recorded incorrectly in ENROL.

Please contact the current, or most recent, school to ask them to make any required updates.

Find contact details on NEN requests (13 February)

New NEN requests that have been created in the AS-CMS directly from ENROL appear under the Support Requests tab in the case record. Open the Support Requests tab and click on the link to see the information supplied.
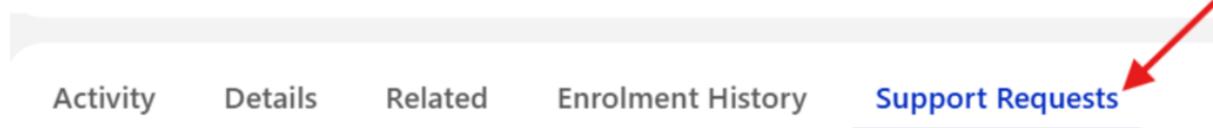
Due to technical constraints, it is not currently possible to create the contacts in the AS-CMS from the NEN form. We are working with the ENROL team to make this possible. In the meantime, you will need to create the contacts using the Add Contact button on the Action Launcher.

If you have concerns about the amount of contact information supplied in the NEN form, contact the referrer to see if they have more information available.

"Salesforce Mobile App" and the Attendance CMS (13 February)

The Attendance CMS cannot be accessed using a mobile app. If you are using a tablet or iPad, use your browser instead.

- Open Safari, Edge or Chrome

- Use the same links to access your ESL account and to log into the AS-CMS as you would on your laptop.

Please note that the layout has not been designed for a phone screen, but your tablet display should look very similar to your laptop, depending on screen size.

Closing a case (13 February)

Withdrawing from a school role (CA case) or enrolling (NEN case) are no longer close reasons. A case can be closed when

1. The student is attending regularly, or

2. Attendance and engagement have stabilised and the school is able to support the student via their Attendance Management Plan processes, or

3. Other close criteria have been met, ie the student:

   a. is confirmed to be overseas and you don't know that it is temporary, or

   b. has an active homeschool, early leaving or other exemption, or

   c. is deceased, or

    d. has enrolled at a school that is out of scope for the attendance service (Te Kura, a Private school or a Charter school), or

    e. has turned 16 and no longer wishes to attend.

4. Another reason will be added in the near future for children with complex circumstances so that the case can be closed in consultation with the Ministry. An example may be when a child is terminally ill.

In the meantime, if you are working with a family where you believe it is unreasonable to have an active attendance case, and there is no existing close reason, contact your CRM. These close criteria apply to both Chronic Absence (CA) and Non-Enrolment Notification (NEN) case types. Some examples of key changes from the current state are shown below.

- There are no KPIs or service levels associated with how long cases remain open.

- Cases are not closed at the end of the school year. This allows support to continue for at-risk students, for example providing the ability to identify students with active attendance cases who have left Year 8 and not yet enrolled at college for the new school year.

- An attendance case raised for Chronic Absence is not closed if the student withdraws from their school roll. The case stays open, and may change to a NEN case if the student doesn't re-enrol in a timely manner.

- A NEN case does not close when the student re-enrols at a school. The service provider will have a transition meeting with the school so that appropriate supports are put in place to re-engage them after their period of absence. The case is put into Transition status while the school supports the student to settle back into engagement and attendance. The same attendance case can change back to a Chronic Absence type if the school requires additional support. The case remains active, and can continue to change between NEN and CA types, until one of the close criteria have been met.

### *Moving to Transition Status (13 February)*

Once a student with a NEN case has re-enrolled, or a child with a CA case has returned to regular attendance or is engaged with the school AMP process and no longer requires additional support, the provider will arrange a Transition meeting with the school. At this meeting you will hand over the student plan and provide the school with any information they need to support the student back into regular attendance via the processes in their Attendance Management Plan, especially if the student has been non-enrolled for an extended period of time. This may include, for example, the school planning to respond more quickly to any issues or putting an individual attendance management plan in place early on.

This is also where you can agree with the school about when they should make a new CA support request, to change the case to a CA so you can keep working with the student. In most cases the school would aim to support the student themselves using the approach defined in their Attendance Management Plan, and call the provider back in if they are unable to get engagement or attendance is already very concerning. Note – a school with an ISP can choose to allocate the CA to their ISP instead of to their catchment service provider. Please consider this option when speaking with ISP schools.

The Transition Meeting is an event type that can be selected from the drop-down list when the user clicks into the Subject line of an event. Providers can find 'Add Event' on the Action Launcher.
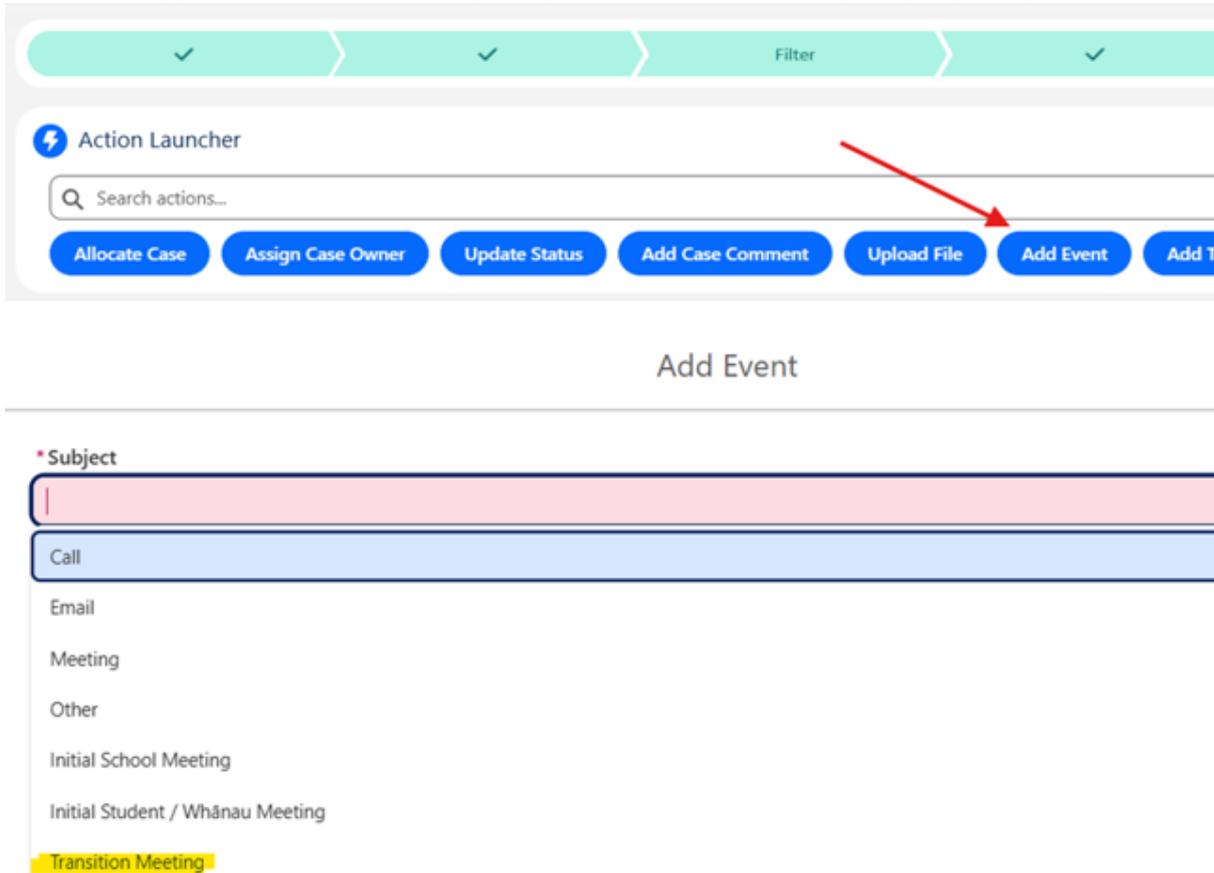
Once the transition meeting has taken place, use the Update Status button on the Action Launcher to change the status to Transition.
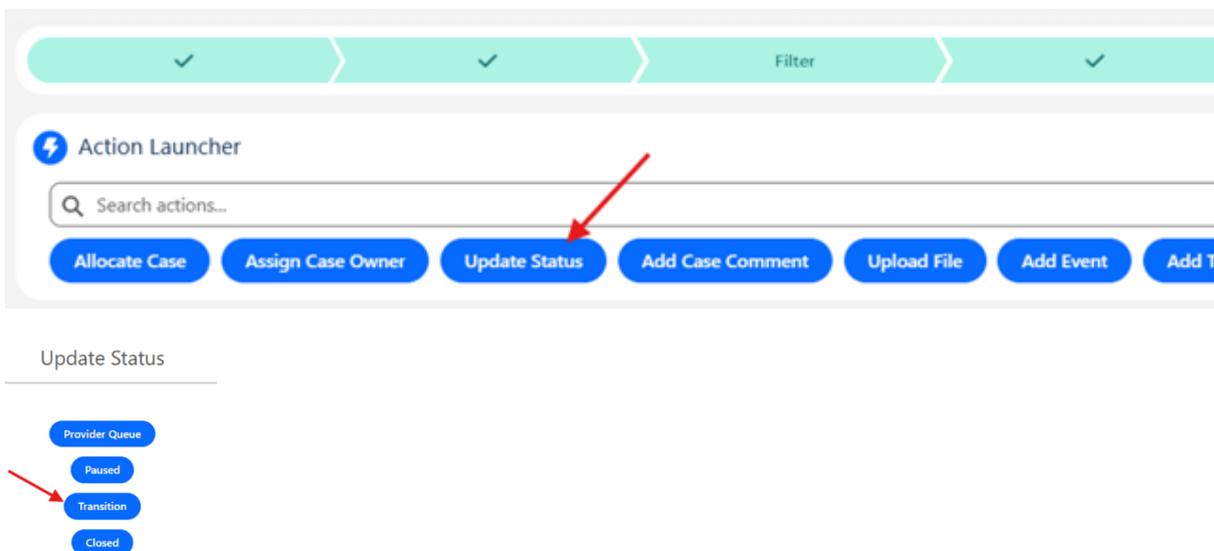
You will be asked to select a Transition reason. For a Non-enrolled case, the options are Assisted Enrolment (where they worked with the student and school to get them enrolled) or Other enrolment (where the student and caregivers got themselves re-enrolled independently).

Student has enrolled outside of catchment (13 February)

If a child is currently enrolled at a school outside your catchment, the Out of Catchment flag will appear, the name of the new catchment will show under Current School Catchment, and the New Provider will show.

1. Click the link to see the contact details for the new provider

2. Contact them to let them know that you are reallocating a case. Do not reallocate a case to a new provider without making contact first. If you have been working with the student, arrange a handover meeting.

3. Make sure that your case notes are up-to-date

4. Use the Allocate Case button on the Action Launcher to send the case directly to the new provider (**not to CIT**).

Note: The child must be entered into ENROL by the new school. If the Out of Catchment box is not ticked, or the child is not currently enrolled, or the enrolled school is inside your catchment, you cannot reallocate a case for this reason.

If you believe the child is attending a school outside your catchment but the school has not yet updated ENROL, contact the school and ask them to update ENROL.

Change how your name appears in the AS-CMS (13 February)

The Attendance CMS profile is created with the same name that has been used for their ESL, but it's easy to change this in your AS-CMS user profile.

Once you have logged into the AS-CMS, click on the bear icon in the top right corner, and click on the Settings link.
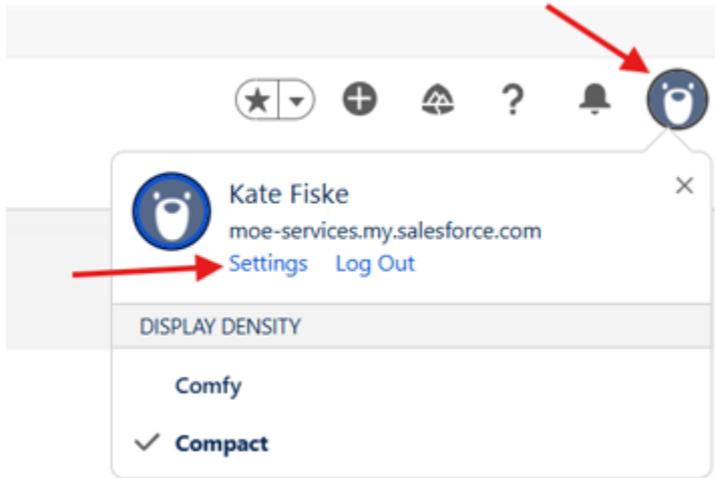
It will open on the Personal Information screen (if not, you can select Personal Information from the menu on the left-hand side). From here you can make any required edits to how your name appears in the system.
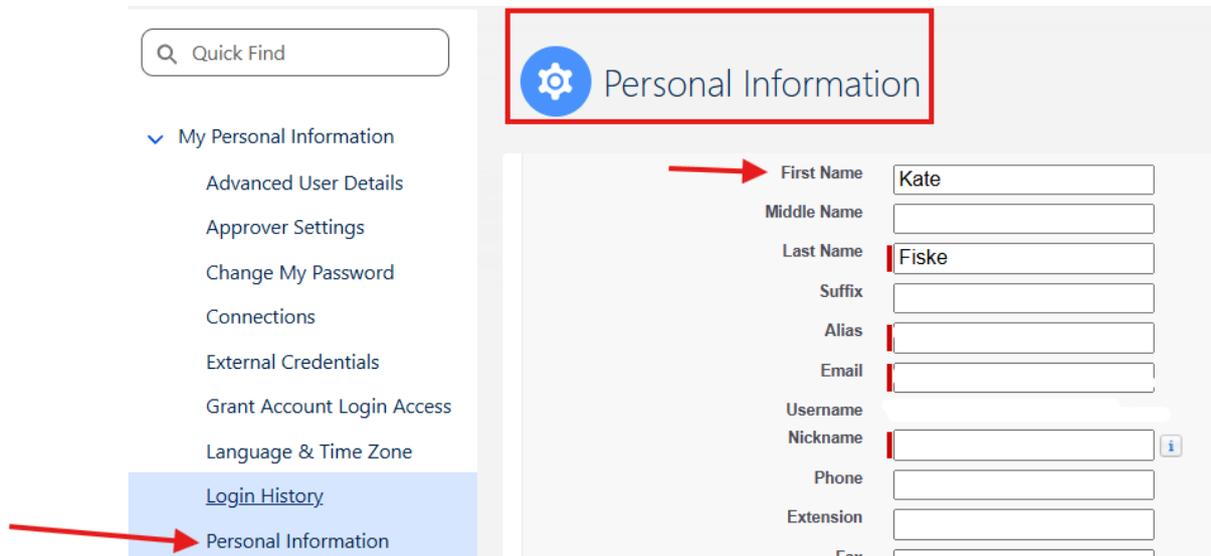
Finding contact details in new NEN cases (13 February)

New NEN cases are now making their way to providers. These cases have never been in ASA, and have been created by the new AS-CMS. Use the Support Requests tab to find the NEN referral details. Click on the link to open the record, where you will find the contact details and other information. Note that you will still be able to see the enrolment history from the Enrolment History table.
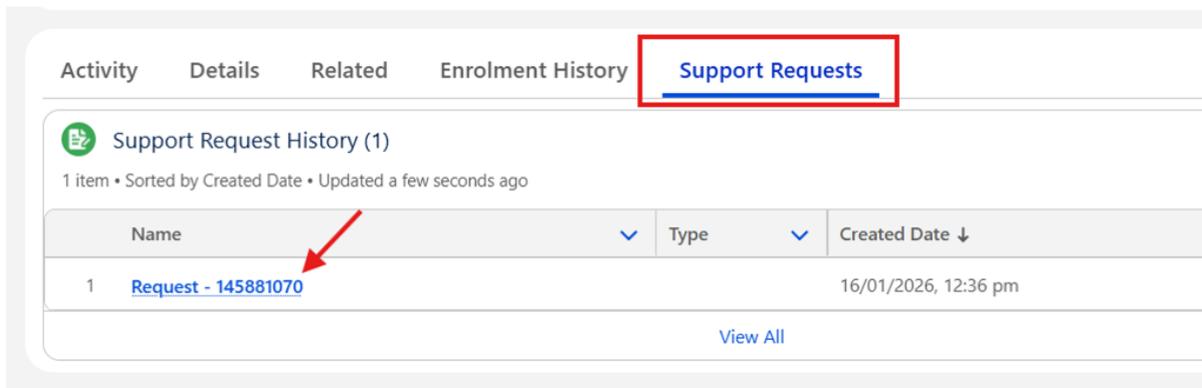
Some information for new NENs also appears under the Details section, including Referrer comment and referrer contact information.

Service Provider Contact Details (13 February)

Service provider contact details are now available in the Attendance CMS. You can use this information to contact other service providers, for example when you are reallocating a case to them, or have received a reallocated case from them. There are several ways to find the right service provider, if you are unsure:

- Search them by name or org ID in the search bar in the AS-CMS

    o Use the published Map Tool if you are unsure which provider to contact. Click on a catchment area to open a window that shows the name of the catchment, the name of the service provider and the org ID of the service provider, then type the org ID into the search bar, at the top of your AS-CMS screen. Click on the service provider name in the search results to see their published contact details.

- Search for their catchment name. The catchment record appears under Dimensions in your search results. When you open the catchment record you can follow a link to the service provider contact details.

Hot tip – the AS-CMS also holds school contact details. Click on the link to the school record from your case record to find them.

The contact details in the AS-CMS are the same as the published contact details on service provider websites. If you would like the change your organisation's contact details in the AS-CMS please let us know.

Close all tabs (13 February)

Salesforce opens a tab when you follow a link from one screen to another. This is intended to keep relevant information close at hand and easy to navigate back to, but it can lead to tab-overload.

If you ever want to quickly close all of your open Salesforce tabs, use Shift + W (hold down the 'shift' key and tap W). Note that this will not work if you are currently editing a field, so save your changes first.

Searching for a case by student name (13 February)

You can use the **global search** to search across all records in Salesforce – like a Google search.

If you are searching for a student by name, you may need to change the search scope from 'all records' to 'accounts', using the steps below.
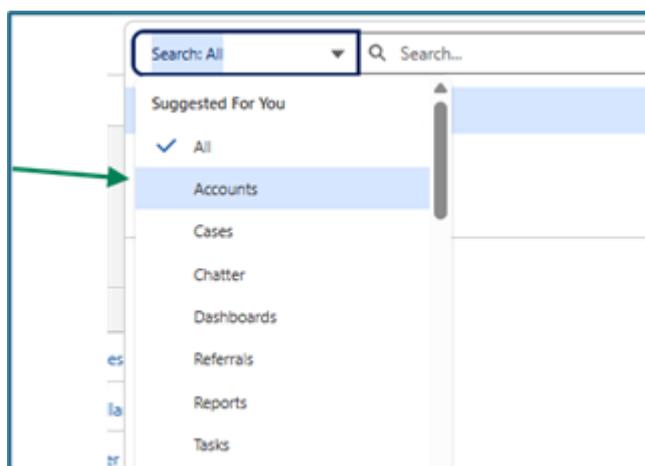
1. Click in the Search box at the top of the screen
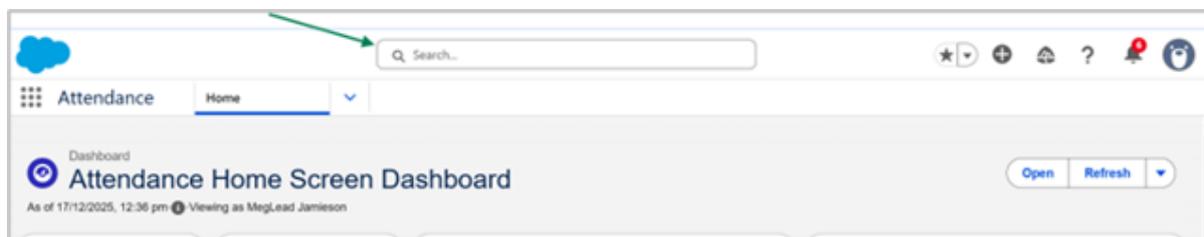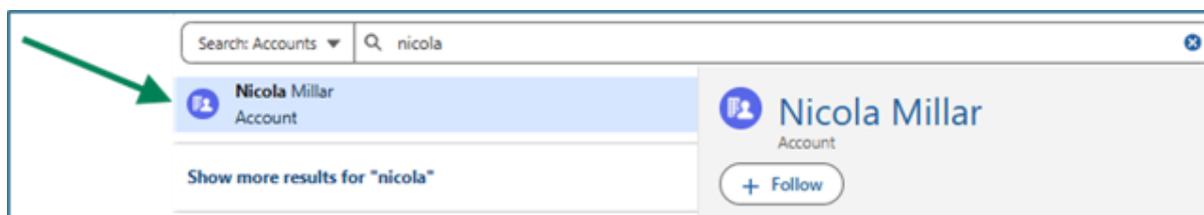

2. Click on the arrow to the right of 'Search All'
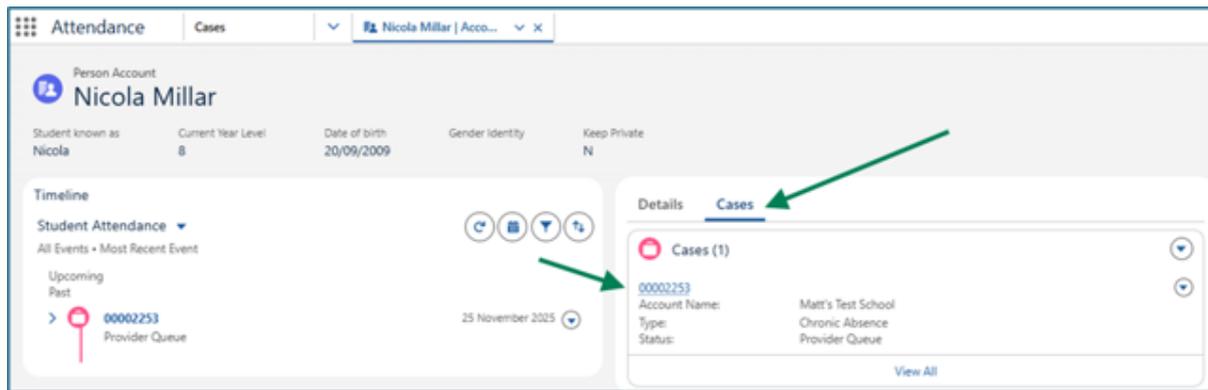

3. Select Accounts from the dropdown list

4. Start typing the student's name then select the correct result from the options that appear below. This will open the student's profile page.

5. To view the student's case/s click on the cases tab, then click on the case number to open the case.

Unable to change Case Owner (added 24 February)

It is not currently possible to change the case owner directly from one person to another. First, update the status to Provider Queue, then try again.

In some cases, the Case Owner is not removed from the case record when the case status is updated to Provider Queue. This means that you still can't update the case owner, even though it is in the correct status. This has been logged as a bug (see Daily Report - High Priority Production Issues) with an ETA for the end of February.

If you are not able to change the case owner:

1. **Check** the current case status

   a. If the **Status** is not Provider Queue, use the Update Status action from the Action Launcher to update the status to Provider Queue, and try again.

   b. If the **Status** is Provider Queue, please check that the case owner is not a person. If it is blank or is an ASP Queue, try to assign the case owner again. If that doesn't work, or if the case owner is a person, please contact the service desk. They will be able to request a manual fix for you. You will be able to reassign the case once the fix has been done.

Emails should not be copied into Case Comments (13 February)

When an email chain is copied and pasted into a case comment, it may cause the timeline to stop displaying. This happens because emails often include a component that can't be handled by case comments.

To stop this from happening, emails should be attached to the case using the 'Upload File' function from the Action Launcher. They should not be copy/pasted into case comments.

Please contact the service desk if this happens to one of your cases. You can still access case comments from the Related tab while the timeline is broken.

Attendance Service: Refer the request to AM and LS Management to resolve.

Information missing from NEN support request (13 February)

Some information that would normally appear in the NEN support request is not showing. The information can still be found elsewhere in the case record.

To find:

- Last attended details – look on the Enrolment History tab

- Referrer details and referrer comment – look on the Details tab

 If you have concerns about the amount of contact information that has been provided in the referral, please contact the referring school to see if they hold more information in their records.

View Case Comments (13 February)

If a user clicks on a migrated comment in the timeline it will give them an error. If they hover their mouse over the comment, it will show the full text in a little pop-up. The easiest way to see all the migrated case comments is to go to the Related tab, where the comments are shown in a table view, already expanded.
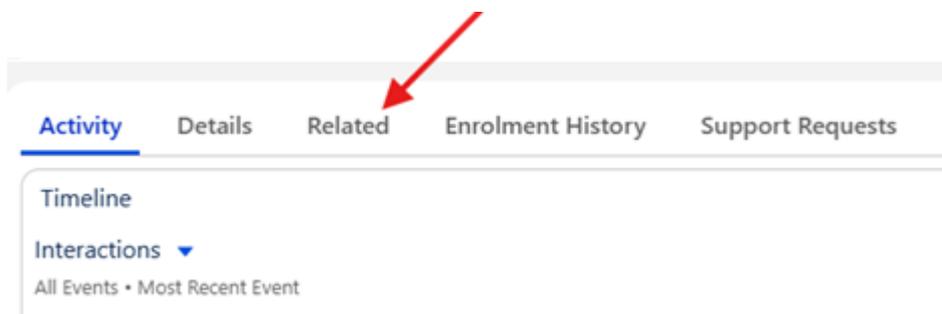
MSD and Immigration Checks (13 February)

 There have been some initial delays with MSD and Immigration requests as we transition to the new attendance service case management system.

- Immigration checks are now being processed regularly, and you can expect results within about one week of submitting a request.

- MSD checks are currently experiencing longer delays. You can expect to receive the first results in two weeks.

We apologise for the inconvenience and appreciate your patience.

Home school exemptions in the AS-CMS (13 February)

When a child receives a Home School exemption, they are recorded in ENROL as *currently enrolled* under school org number 972. At the moment, the school name does not appear in the AS-CMS for these records. This will be resolved in an upcoming release.

What you can do in the meantime

If you notice that a school name is missing in the **Enrolment History** table:

1. Click through to open the record.

2. Check the organisation number.

3. If the org number is 972, the student has a current home schooling exemption.

Enrolment History

2 items • Sorted by First Day of Attendance • Updated a few seconds ago

	Enrolment History Name	First Day of Atte... ↑	Last Day of Attenda...	Enrolment Sta...	School Name
1	Enrolment H-00023683	5/09/2022	30/04/2024	Historical	Oranga School
2	Enrolment H-00033265	4/06/2024		Current	

Related | **Details**

Enrolment History Name	Enrolment H-00033265
School Number	972
School	
First Day of Attendance	04/06/2024
Last Day of Attendance	
Enrolment Status	Current
Entry Year Level	
Student	
School Name	
Leaving Year Level	
Leave Reason	
Post School Actitvity	

Accessing Support (13 February)

Education Service Desk.

- Freephone: 0800 422 599 (NZ only)

- Email: service.desk@education.govt.nz