



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

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Priority issues

The table below summarises current priority known issues following go-live of the AS-CMS, any workaround.

This table only includes the 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

Issue	Description and impact plus any workaround
Provider can still see case after it has been reallocated	If you have allocated a case to another provider but can still see the case and it is appearing in your reports, then record the case number and contact the service desk to manually fix the sharing issue.
Issues with email, address and phone fields when adding a Contact	<p>There is a collection of formatting rules in the case contacts records that are causing issues. The team is working to fix these issues.</p> <ul style="list-style-type: none"> • Default formatting in phone number fields doesn't accept all NZ phone number formats • Street number field does not accept letters (e.g. 5A Main Street) • Email is a compulsory field for contacts <p>Users should enter the correct details in the notes fields that are available on the form, with a note to explain the issue. If the contact does not have an email address, use a fake email such as email@email.com to complete the form.</p>
Out of Catchment alert showing when the case is with an ISP	<p>Currently some cases will show an Out of Catchment alert when allocated to the ISP. This is a known system issue, and the team is working on resolving it.</p> <p>Check the Details tab to see the currently enrolled school (in the Name field), and if it has been correctly allocated you can ignore the alert.</p>
Service Provider cannot update Primary Contact	<p>To create a Key Contact with the correct details, use the Add Contact action from the Action Launcher.</p> <p>Update the case with a case note explaining that the School Primary Contact details are in the Key Contacts.</p> <p>An upcoming release will give school users the ability to update the Primary Contact field on the case record. If the child is no longer enrolled at the school, and the Primary Contact from a previous school is still showing, please contact the Service Desk to resolve.</p>

Issue	Description and impact plus any workaround
<p>Case Managers can manually edit case type, catchment and other fields using Inline Editing</p>	<p>Do not change the case type manually.</p> <p>Please ensure that your kaimahi are aware that they must not use inline editing to change case data while we are waiting for the fix to be implemented.</p> <p>These fields will update automatically when schools make NEN and CA referrals or when changes are made to cases using the correct flows.</p>
<p>Child's enrolment information is out of date</p>	<p>A past issue prevented case details from being updated when details changed in ENROL. The issue has been resolved, but some student records are still out of date. These records are being updated via a separate process that is expected to be completed by the beginning of Term 2.</p> <p>In the meantime, the Daily Attendance Data tab on the case record can be used to check whether and where a child is enrolled. A currently-enrolled school will be submitting daily attendance data for the student.</p>
<p>NENs - Caregiver phone number not displaying in NEN support requests</p>	<p>All providers are required to meet with the school within a few days after a support request for Chronic Absence or Non-enrolment has been received. This meeting should include checking with the school to see if they have any additional contact details that were not supplied in the form.</p> <p>Providers should use this opportunity to check whether a caregiver phone number was supplied and request it directly from the school.</p>
<p>NENs - Provider can't find information submitted by the school on the NEN form</p>	<p>Referrer details and referrer comment can be found on the Details tab in the case record.</p> <p>The last attended school can be found in the Enrolment History table or by checking the Daily Attendance Data to see which school has been submitting this information.</p>
<p>Dual active cases</p>	<p>This is a known system bug that can occur when a CA referral is made for a child who already has an active case. The system may incorrectly create a new case, even though the student already has an active case.</p> <p>While this issue remains unresolved, the team is actively monitoring for duplicate cases. When duplicate cases are identified, they are merged by the team.</p>
<p>Services visibility</p>	<p>A bug is preventing Services from being visible to users who did not create the record.</p>

Issue	Description and impact plus any workaround
	<p>A Case Manager can add a Service to a case record, and they will be able to see and report on the services they have added. However, nobody else who has access to the case, including Workflow Leads, Ministry roles or other case managers if the case is reassigned, can see or report on services added.</p> <p>The team is working on a fix for this issue.</p>
<p>Timeline breaks when email pasted</p>	<p>This can happen with any email, but is more common with email chains that include replies or forwards. If you copy and paste an email into case comments it can cause the timeline to break.</p> <p>This is an ongoing bug and will be fixed. Please contact the Service Desk if this happens to one of your cases.</p> <p>You can still access case comments from the Related tab while the timeline is broken.</p>
<p>Case owner not removed when case returned to Provider Queue</p>	<p>Users cannot change a case owner directly from one person to another. The case must first be moved to Provider Queue status before a new owner can be assigned.</p> <p>There is also a known bug where the case owner is not correctly cleared when the status is updated to Provider Queue. This prevents reassignment even though the case appears to be in the correct status. The issue has been logged and will be fixed in a future release.</p> <p>If the status is not Provider Queue:</p> <ul style="list-style-type: none"> - Update the status to Provider Queue using Update Status in the Action Launcher. - Then try assigning the case owner again. <p>If the status is Provider Queue:</p> <p>Check the Case Owner field:</p> <ul style="list-style-type: none"> - If it is blank or shows an ASP Queue, try assigning the case owner again. - If it still shows a person, this is likely the known bug. Provide the case number to the Service Desk and ask them to manually fix the issue.
<p>Case Managers unable to access student details</p>	<p>There is a current system issue that may prevent case managers from seeing Student Details on cases assigned to them.</p>

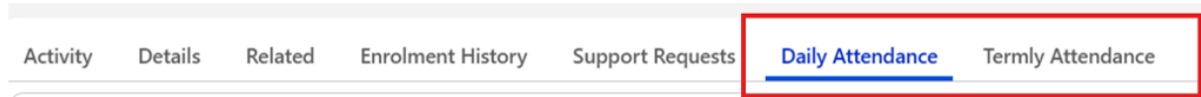
Issue	Description and impact plus any workaround
	<p>An interim fix has been put in place to address this issue. The fix runs twice a day and restores student details visibility for cases that are currently assigned. If a new case is assigned to a case manager, student details may not be visible immediately.</p> <p>Visibility should be restored after the next interim fix run, which may take a few hours.</p>
<p>For some NENs the timeline shows an email notification to say a CA was submitted</p>	<p>This is a known bug</p> <p>Please refer to the Related tab on the case to see the actual case history.</p>
<p>Case is blank - shows no student name or details</p>	<p>There is a known issue where a student record is not created and linked to the case if the student's first names are longer than 40 characters. The team is working on resolving this issue and it will be fixed in a future release.</p>
<p>Attendance data</p>	<p>There is a known issue with attendance data widgets if a student enrolls in a school partway through a term. The widgets do not update for the most recent enrolment.</p> <p>Please refer to the daily data below the widgets until this issue is resolved.</p>
<p>Access to new cases in a different catchment</p>	<p>In some circumstances, where a student has a new case created in one catchment but has a previous case in another catchment, the new case can be seen by the catchment that owns the previous case. The case will be visible in the old catchment's queue as well as the correct catchment, and if the old catchment tries to assign a case manager, they will be provided with a list of available kaimahi from the correct catchment.</p> <p>This is a known issue that will be resolved in an upcoming release.</p> <p>In the meantime:</p> <p>If you can see a case in your queue that does not belong in your catchment, do not allocate it. The other provider can also see it, and they will allocate it appropriately from their own queue.</p> <p>To have it removed from your queue you can raise a support request by emailing the Service Desk.</p>

Additional process and user guidance for frequently asked questions

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

Daily Attendance Data (added 10 April)

Attendance data has gone live and can be found on the case record:



The data updates around 9:30am daily, ensuring you have access to the most current attendance information available. Note that a new case will not have any attendance data until the following morning.

Attendance information is displayed as two tabs within each case record:

Daily attendance

- Daily attendance is shown in a graph that displays their cumulative attendance over the course of the term, and as a table that includes their attendance code for each day submitted by the school.

Note that attendance data may be submitted by a school before they have updated ENROL, so this is a valuable new check for non-enrolled students.

Termly attendance

- This provides you with a view of a student's attendance patterns over the last 12 months.

This information is intended to support day-to-day conversations with students, caregivers, and schools, as well as providing you with a new tool to locate non-enrolled students and inform goal-setting.

No attendance data for a student

Attendance data 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.

Incomplete attendance data for a student

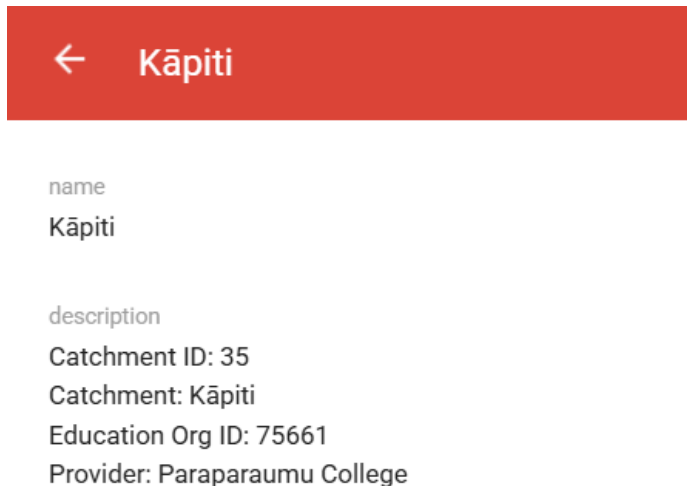
Some attendance data may look erratic or incomplete. This may be because the school has not submitted data, or it may be because a student has a wellbeing plan or has an arrangement with an alternative education provider that reduces the number of days that they are required to attend school.

If you are unsure, contact the school. They will be able to explain what attendance data they are sending to the Ministry, and this will help to explain why the data looks incomplete.

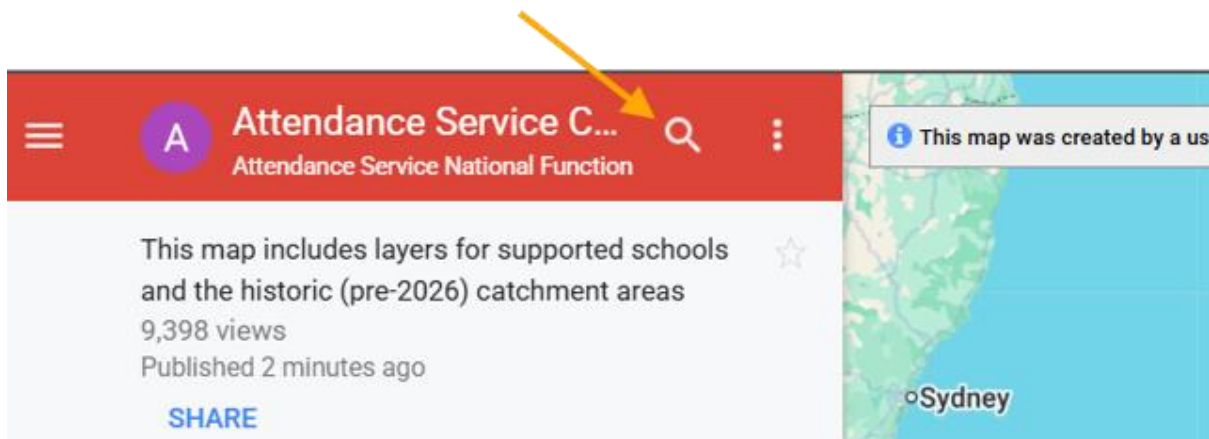
Using the Catchment Map (added 10 April)

The [catchment map](#) is a published tool to help you check which catchment a case should belong to, and help you find contact details for other service providers. It can also be used to find out which catchment is related to a specific school. Check this map before reallocating a case to CIT if you think it should have gone to neighbouring catchment - sometimes the boundaries are not exactly where you expect!

You can click on anywhere on the map to open the catchment information panel. This gives you the name of the catchment and the associated provider.



If you need to find an address or a school, click on the search icon. This opens a panel where you can type the school name or the address.



The result will show us as a red dot on the map. Click anywhere next to the dot (not on it) to open the catchment information panel.

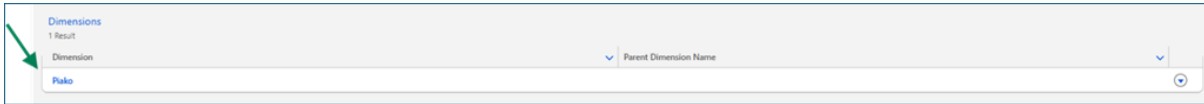
You can search for Provider name in the AS-CMS to find their contact details. This is important when students move into a new catchment area. You should always contact the new provider and organise a time to provide a handover before reallocating a case.

Finding a catchment provider in the AS-CMS (added 10 April)

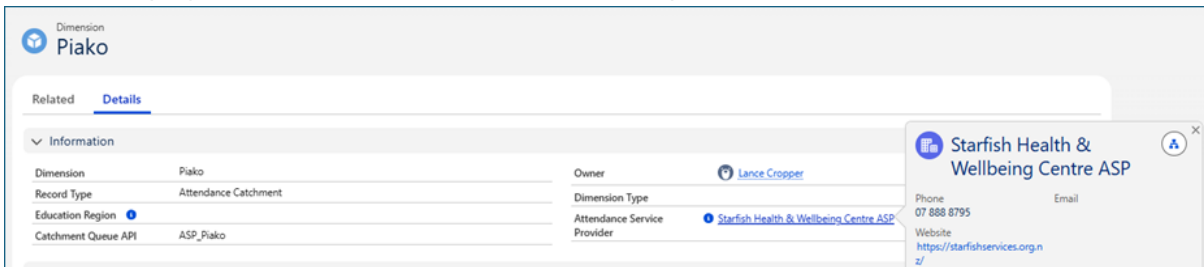
To find the provider for a catchment enter the catchment name into the global search and then hit enter to display the search results:



Scroll through the results to find 'Dimension', then click on the link to the catchment:



This will display the details of the catchment and the provider:



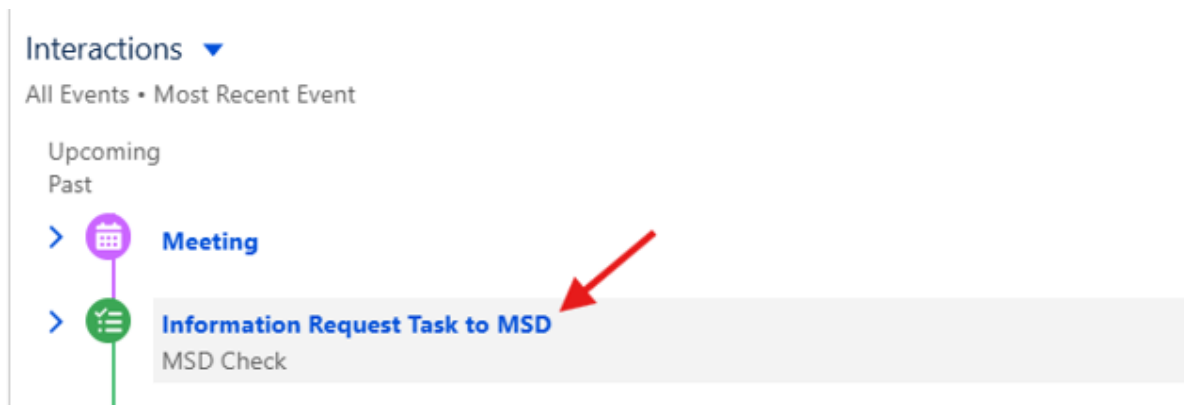
Finding Information Request results (added 10 April)

The case owner will receive an in-app notification when the result is returned. Click on the notification to open the task and check the results. You can also open the task directly from the case record to find results.

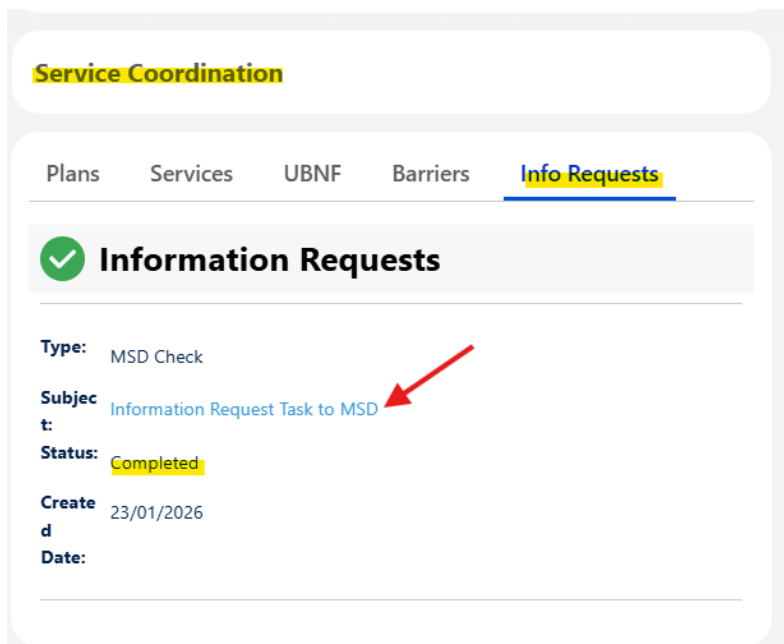
Check that the results have been returned. You can tell this from the task status.

- **Requested** means that you have sent a request, and it has not yet been sent to the responding agency. At this time, Immigration requests are sent weekly and MSD requests are sent daily.
- **Open** means that the request has been sent to the agency, and the response has not yet been received.
- **Completed** means that the response has been received and has been uploaded to the task.

Open the task. You can open the task by clicking on it in the timeline, or from the Info Requests section of the case record.



Click on the timeline link to open the task



Click on the task name to open the task

- Review the results. Look for Immigration Status and Carrier Date in an Immigration task. Look for Comments in an MSD task.
- If you have received contact details from MSD **remember to update or add the case contact**. It is important to keep up-to-date contact details in the case contacts, so that they can be found quickly if the case is reassigned or re-opened at a later date.

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.

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.

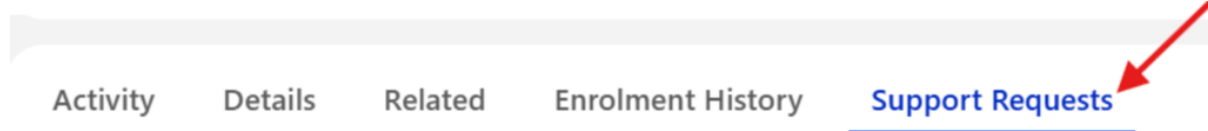
Incorrect Student Details (13 February)

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.

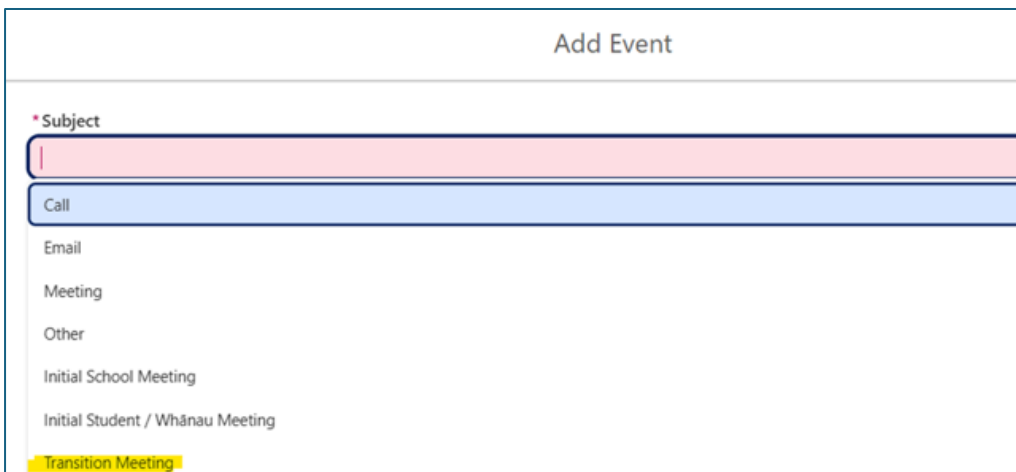
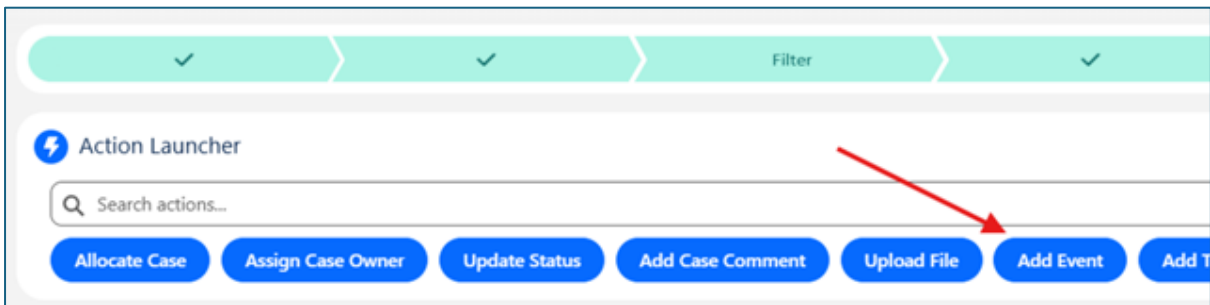
Moving to Transition Status (13 February)

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.

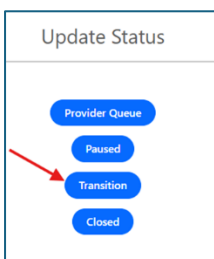
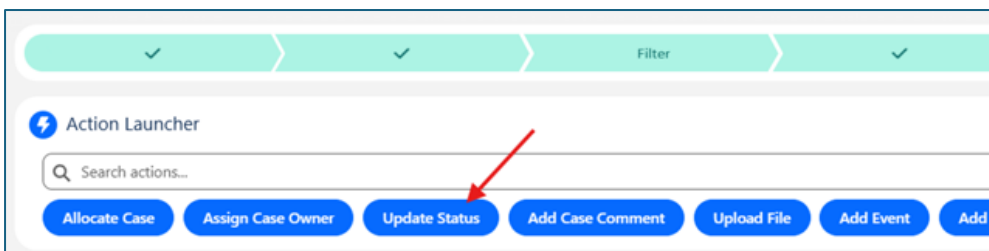
This is also where you can agree with the school about when they should make a new CA support request, to change the case to a CA so you can keep working with the student. In most cases the school would aim to support the student themselves using the approach defined in their Attendance Management Plan, 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).

The screenshot shows a web form titled "Update Status". Below the title is a dropdown menu with the label "*Select a transition reason". The dropdown is open, showing three options: "--None--", "Assisted Enrolment", and "Other Enrolment". The "Assisted Enrolment" option is currently selected and highlighted in blue.

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**).

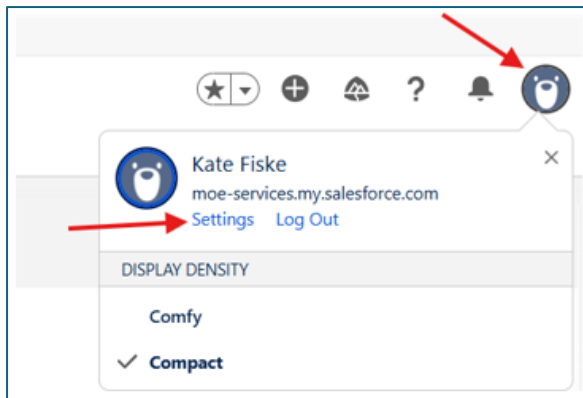
Note: The child must be entered into ENROL by the new school. If the Out of Catchment box is not ticked, or the child is not currently enrolled, or the enrolled school is inside your catchment, you cannot reallocate a case for this reason.

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.

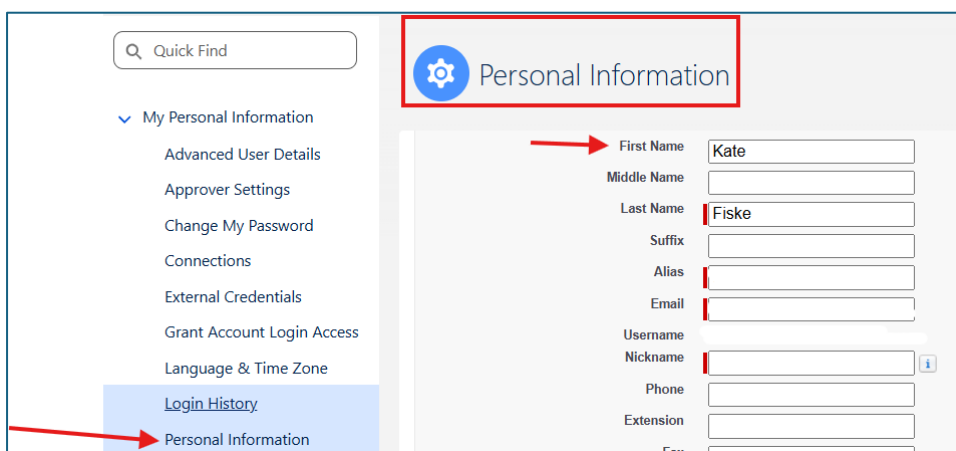
Change how your name appears in the AS-CMS (13 February)

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.

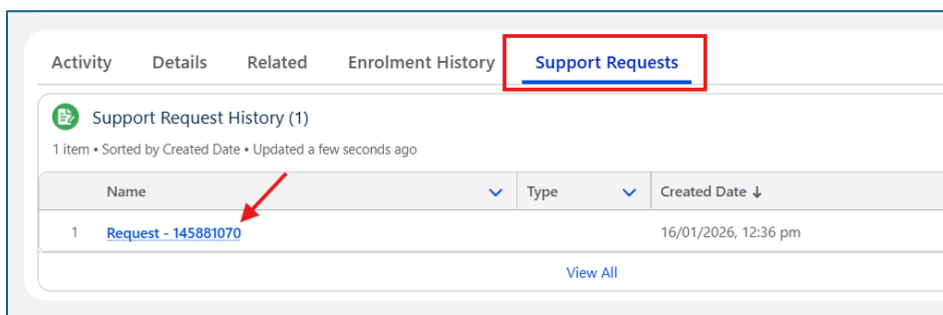


It will open on the Personal Information screen (if not, you can select Personal Information from the menu on the left-hand side). From here you can make any required edits to how your name appears in the system.



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
 - 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 to 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.

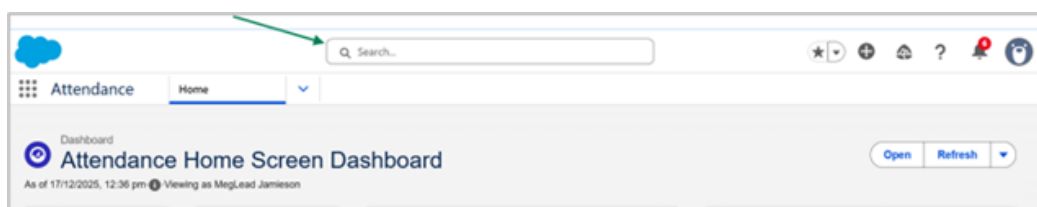
If you ever want to quickly close all of your open Salesforce tabs, use Shift + W (hold down the 'shift' key and tap W). Note that this will not work if you are currently editing a field, so save your changes first.

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.

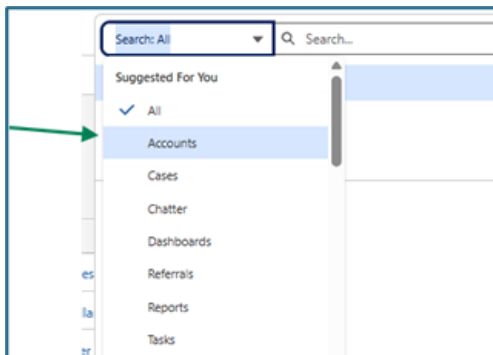
1. Click in the Search box at the top of the screen



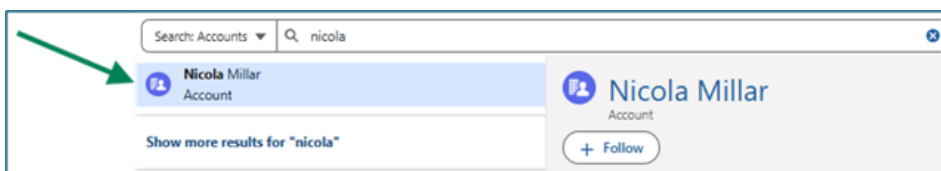
2. Click on the arrow to the right of 'Search All'



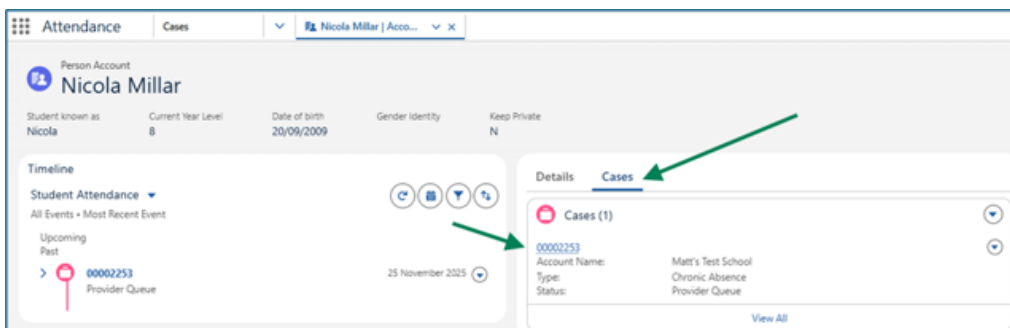
3. Select Accounts from the dropdown list



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

Known issues

- 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.

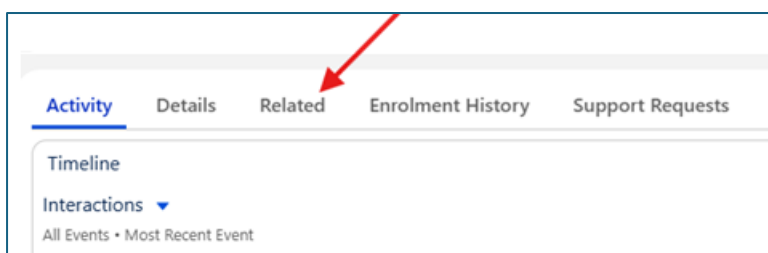
To find:

- 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.



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 Activity	