



Attendance Service Case Management System (AS-CMS) – current known issues and common support questions

Contents

Priority issues.....	2
Additional process and user guidance for frequently asked questions	7
1. Service Provider cannot update Primary Contact	7
2. Daily Attendance Data	7
3. Using the Catchment Map	8
4. Finding a catchment provider in the AS-CMS	9
5. Finding Information Request results.....	9
6. Sorting by Student Age and Case Age	10
7. Allocating cases to CIT	10
8. Incorrect Student Details	11
9. Find contact details on NEN requests	11
10. “Salesforce Mobile App” and the Attendance CMS	11
11. Closing a case	11
12. Moving to Transition Status.....	12
13. Student has enrolled outside of catchment	14
14. Student has moved catchments but is not enrolled	14
15. Change how your name appears in the AS-CMS.....	14
16. Finding contact details in new NEN cases	15
17. Service Provider Contact Details	16
18. Close all tabs	16
19. Searching for a case by student name	16
20. Unable to change Case Owner	18
21. Emails should not be copied into Case Comments	18
22. Information missing from NEN support request	18
23. Home school exemptions in the AS-CMS	19
24. Excluded Students.....	19
25. Conflicting information about student being in NZ	20
26. Chronic Absence Case raised by school when child is not enrolled	21
27. NSN Numbers in the AS-CMS (Provider access).....	21

28. Using the Not Located flag	22
29. The timeline is not showing all items	22

Priority issues

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

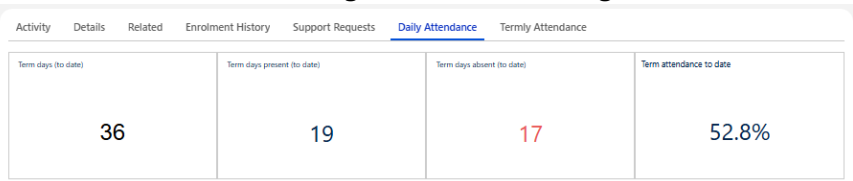
This table only includes the priority issues. Other faults are handled as they are reported and will be prioritised based on impact.

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>
Case Managers can manually edit case type, catchment and other fields using Inline Editing	<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>

Issue	Description and impact plus any workaround
NENs - Caregiver phone number not displaying in NEN support requests	<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>
NENs - Provider can't find information submitted by the school on the NEN form	<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>
Dual active cases	<p>This is a known system issue that can occur under certain circumstances when a CA referral is made for a student who already has an active NEN case, or a NEN referral is made for a child who already has an active CA. The system may incorrectly create a new case, instead of updating the existing active case.</p> <p>Correct behaviour should be:</p> <ul style="list-style-type: none"> • a new CA referral updates an existing NEN case to a CA case • A new NEN referral updates an existing CA case to NEN case. <p>The technical team are actively monitoring for dual cases and merging them where possible. In some cases it is not possible to merge two cases, and the technical team will aim to close one of these cases.</p>
Services visibility	<p>A bug is preventing Services from being visible to users who did not create the record. 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.</p> <p>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>
Timeline breaks when email pasted	<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>

Issue	Description and impact plus any workaround
Unable to assign case directly from one case manager to another case manager	<p>Users cannot change a case owner directly from one person to another. The user must first update the status to Provider Queue using the Update Status button on the Action Launcher. This will remove the previous case owner and make it possible to assign a new case owner.</p>
Case owner not updated when case returned to Provider Queue	<p>Users should use the Update Status button on the Action Launcher to return a case to the Provider Queue. There is a known bug that allows users to use the Reallocate Case button to ‘reallocate’ the case back to their own Provider Queue. If they use this option, the current case owner’s name is not removed from the case and it is not possible to assign the case to a new case owner.</p> <p>This issue will be fixed in an upcoming release. In the meantime, users should be advised to use the Update Status button on the Action Launcher when returning a case to the Provider Queue.</p> <p>If the user has incorrectly used the Reallocate Case button to send the case to the Provider Queue then contact the service desk. They can arrange to have the case owner name removed so that a new case owner can be assigned.</p>
Case Managers unable to access student details	<p>There is a current system issue that may prevent case managers from seeing Student Details on cases assigned to them. When this happens, the user can’t see student details such as enrolment history and the student’s personal details when they open the case. They are also unable to use features such as creating plans and adding barriers.</p> <p>This is a known issue that will be fixed in an upcoming release.</p> <p>In the meantime, an interim fix has been put in place to address the issue that may prevent case managers from seeing Student Details on cases assigned to them. The fix runs twice a day and restores student details visibility for cases that are currently assigned.</p> <p>If a new case is assigned to a case manager, student details may not be visible immediately. Visibility should be restored after the next interim fix run, which may take a few hours. Service desk should advise the caller to wait until later in the day and check again.</p> <p>If the case has already been assigned to that case manager for more than 24 hours, and the issue persists, this should be escalated to the Service Desk.</p>

Issue	Description and impact plus any workaround
<p>For some NENs the timeline shows an email notification to say a CA was submitted</p>	<p>Some NEN cases have an entry on the Timeline that shows a CA Support Request confirmation email was sent to a user with an Education email address.</p> <p>This is a known bug. If a NEN case has this entry on the Timeline you can:</p> <ul style="list-style-type: none"> • check the case type, to confirm that it is still a Non Enrolled case • check the Related tab on the case to see whether or not a CA request has actually been submitted • check the Support Requests tab on the case to see if a CA Support Request has been associated with the case. <p>If there is no other evidence of a CA support request, this timeline entry has appeared in error. This should be escalated to Salesforce Support via ASM including the case number and a description of the issue. Please request that the Salesforce team remove the incorrect timeline entry.</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 name is longer than 40 characters, or their last name is longer than 80 characters. The case will appear to be blank - with no student details on it.</p> <p>This issue can arise when the student has more than one middle name, as ENROL captures first and all middle names in the First Name field, which can then exceed the character limit for the matching AS-CMS field.</p> <p>The Platform team are urgently working to resolve this issue. In the meantime, service providers should contact the school to get student details if these are not showing on the case. Providers can work with the child and family and maintain their notes outside the system until the issue has been fixed.</p> <p>Once the issue has been fixed and the case is created, the provider must transfer all notes into the system and securely dispose of any externally-held case notes.</p> <p>The issue should be escalated to the Service Desk.</p>
<p>Attendance data in widgets not updating</p>	<p>The widgets on the Daily Attendance tab are not updating with recent attendance data if the student has changed enrolment during a term.</p>  <p>The widgets are continuing to count the first school and do not pick up attendance days from the new school.</p> <p>This is a known issue that the team is working to fix.</p>

Issue	Description and impact plus any workaround
Access to new cases in a different catchment	<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> <ul style="list-style-type: none"> • 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 • To have it removed from your queue you can raise a support request by emailing the Service Desk.
The inability to Edit or Delete contacts on a case.	<p>It is not currently possible to amend the name of a contact or to delete the contact altogether from a case. The team is working on enabling this.</p> <p>In the meantime please create a new contact with the correct details, delete any details that can be removed from the old contact, and add notes to explain that the contact is no longer correct.</p>
An ISP or ASP user working for more than one organisation cannot use the same ESL account for both.	<p>If you are an ISP or ASP user working for more than one organisation you will need a separate ESL account for each organisation.</p> <p>Contact the service desk for assistance with this.</p>

Additional process and user guidance for common scenarios

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

1. *Service Provider cannot update Primary Contact*

The Primary Contact information can only be updated by a school user. It is not possible for an Attendance Service Provider to update the Primary Contact details. This is because the Primary Contact must be given an Attendance Service CMS role by their school's Delegated Authoriser. The Service Provider can't tell which school users have this role, so it is not possible for them to maintain that field.

Currently the school user is not able to update the Primary Contact. While this issue is being fixed, if the service provider is aware that the Primary Contact on a case has changed they should:

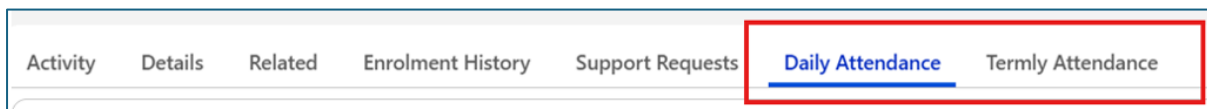
- create a Key Contact on the case using the Add Contact action from the Action Launcher
- add Case Comment explaining that the School Primary Contact details are in the Key Contacts.

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.

2. *Daily Attendance Data*

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.

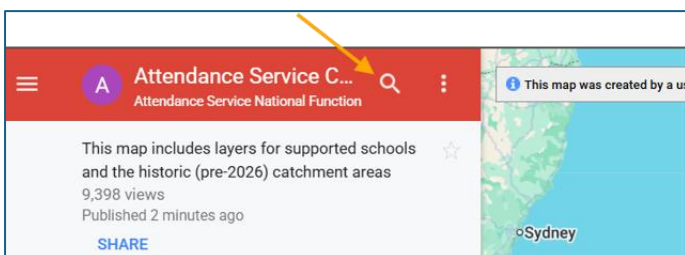
3. Using the Catchment Map

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.

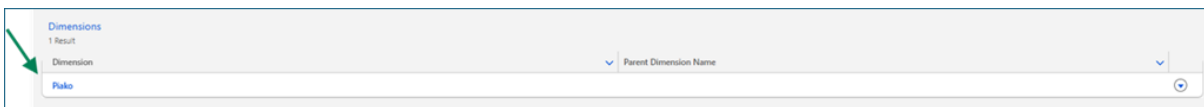
You can search for Provider name in the AS-CMS to find their contact details. This is important when students move into a new catchment area. You should always contact the new provider and organise a time to provide a handover before reallocating a case.

4. Finding a catchment provider in the AS-CMS

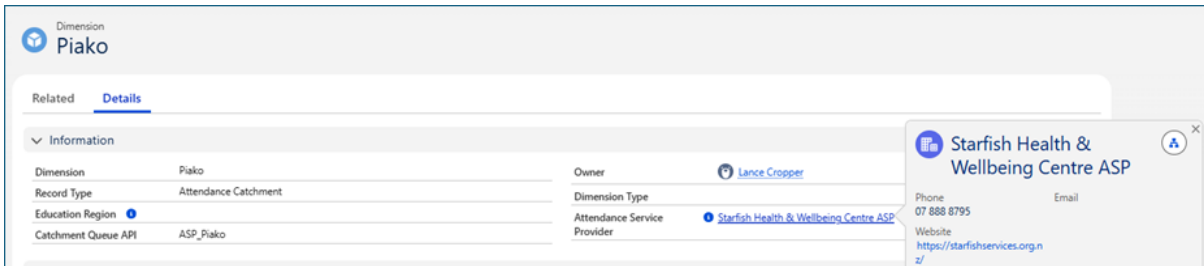
To find the provider for a catchment enter the catchment name into the global search and then hit enter to display the search results:



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:



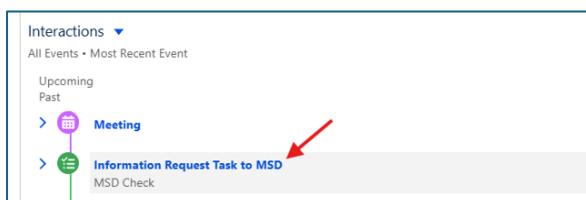
5. Finding Information Request results

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.

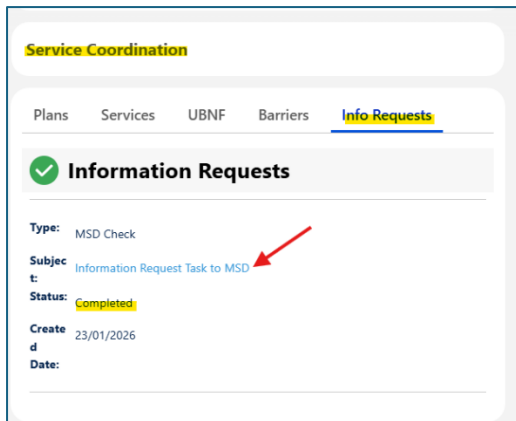
Check that the results have been returned. You can tell this from the task status.

- **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.

6. *Sorting by Student Age and Case Age*

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.

7. *Allocating cases to CIT*

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.

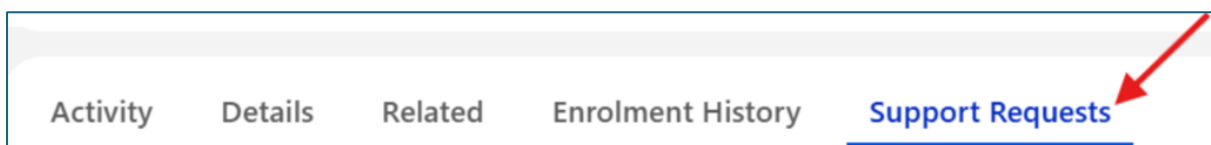
8. *Incorrect Student Details*

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.

9. *Find contact details on NEN requests*

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.

10. *“Salesforce Mobile App” and the Attendance CMS*

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.

11. *Closing a case*

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, i.e. 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.

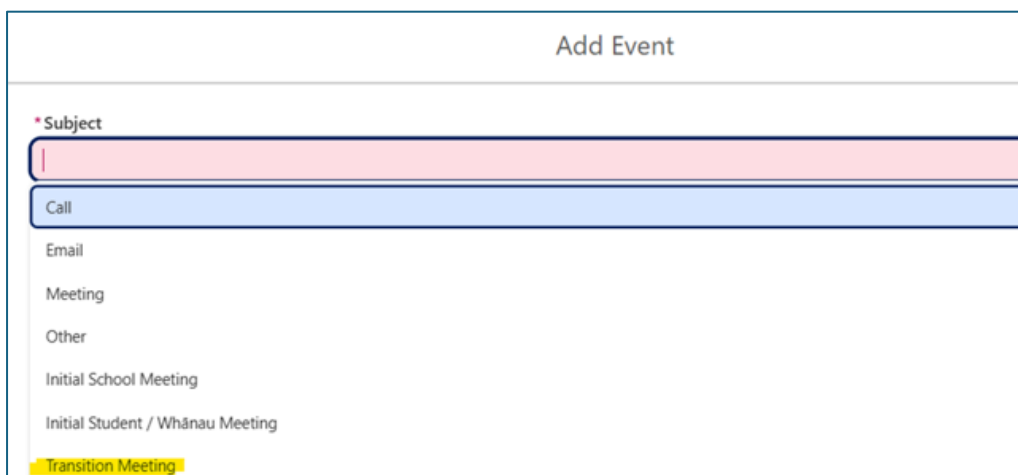
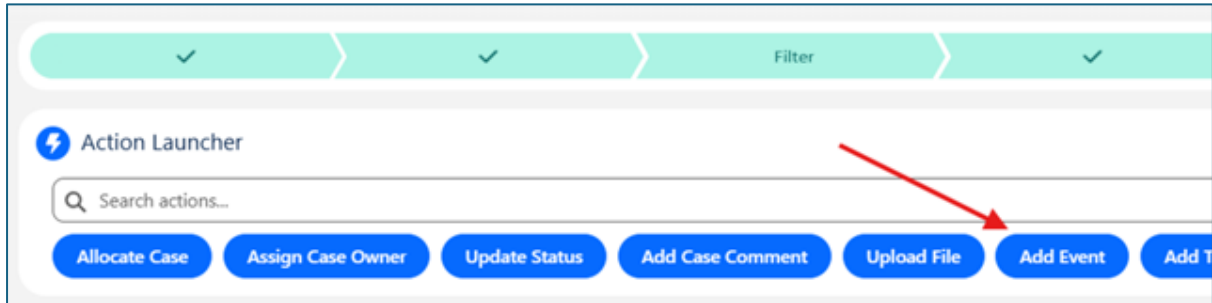
- There are no KPIs or service levels associated with how long cases remain open.
- Cases are not closed at the end of the school year. This allows support to continue for at-risk students, for example providing the ability to identify students with active attendance cases who have left Year 8 and not 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.

12. Moving to Transition Status

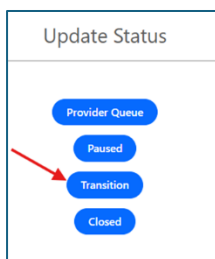
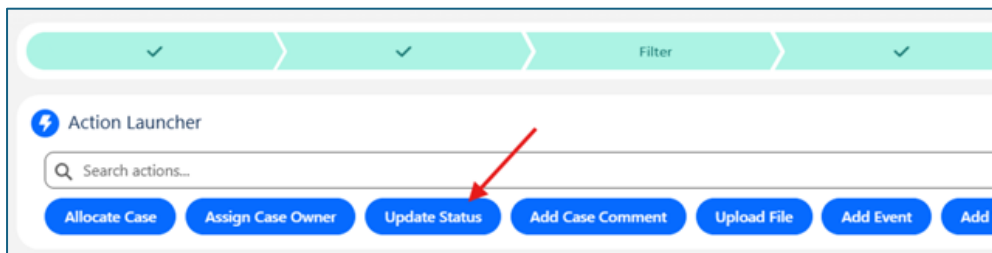
Once a student with a NEN case has re-enrolled, or a child with a CA case has returned to regular attendance or is engaged with the school AMP process and no longer requires additional support, the provider will arrange a Transition meeting with the school. At this meeting you will hand over the student 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 four options: "--None--", "--None--", "Assisted Enrolment" (which is highlighted in blue), and "Other Enrolment".

13. Student has enrolled outside of catchment

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.

14. Student has moved catchments but is not enrolled

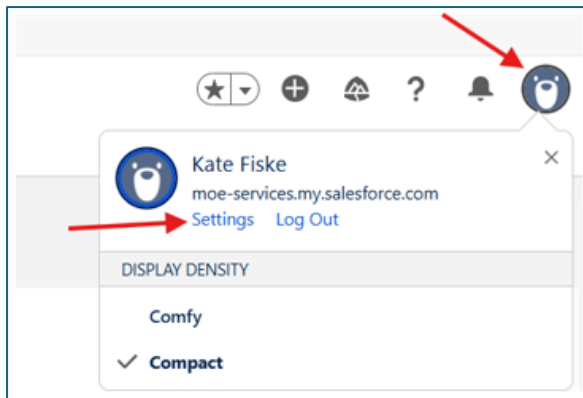
When a student is not enrolled and they move to another catchment the case will need to be allocated to CIT so that it can then be allocated out to the new provider.

Before allocating the case to CIT the provider should update the case with any new address details or any details about which provider it should go to.

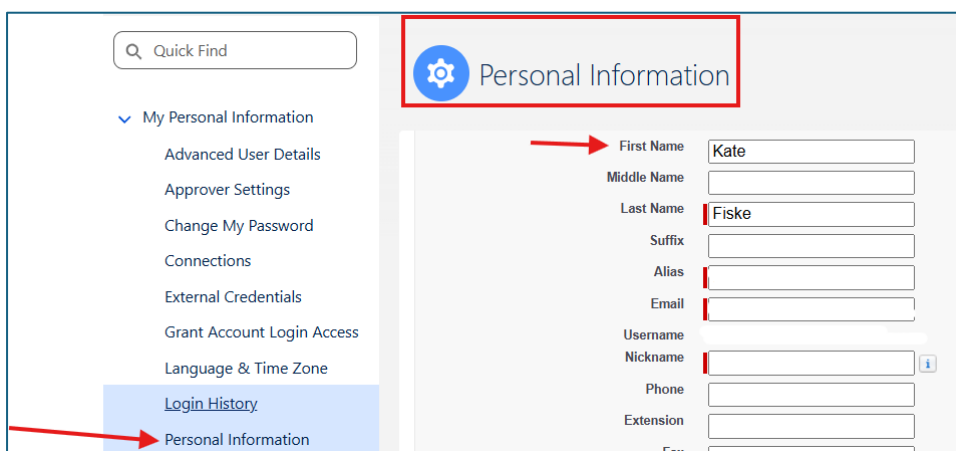
15. Change how your name appears in the AS-CMS

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.

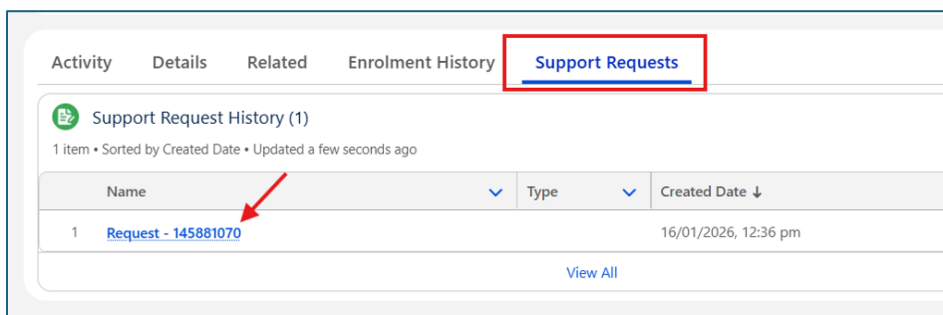


It will open on the Personal Information screen (if not, you can select Personal Information from the menu on the left-hand side). From here you can make any required edits to how your name appears in the system.



16. Finding contact details in new NEN cases

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.

17. Service Provider Contact Details

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.

18. Close all tabs

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.

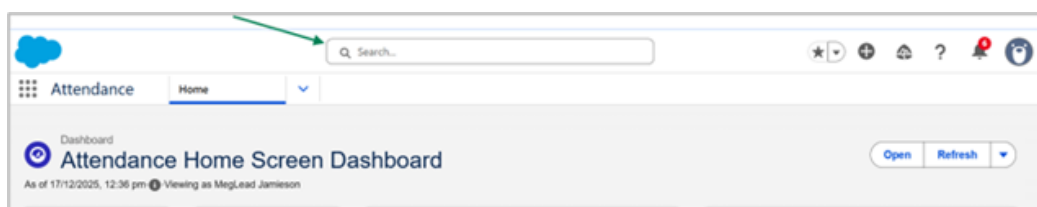
If you ever want to quickly close all of your open Salesforce tabs, use Shift + W (hold down the 'shift' key and tap W). Note that this will not work if you are currently editing a field, so save your changes first.

19. Searching for a case by student name

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.

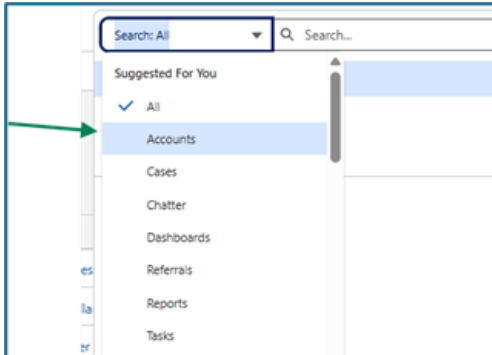
1. Click in the Search box at the top of the screen



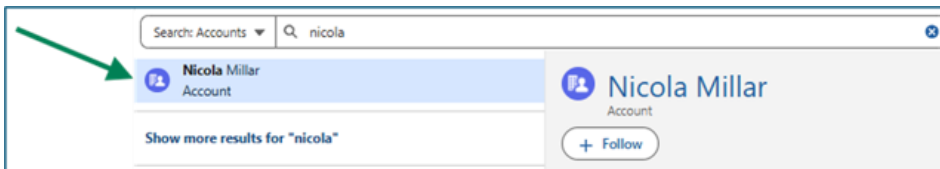
2. Click on the arrow to the right of 'Search All'



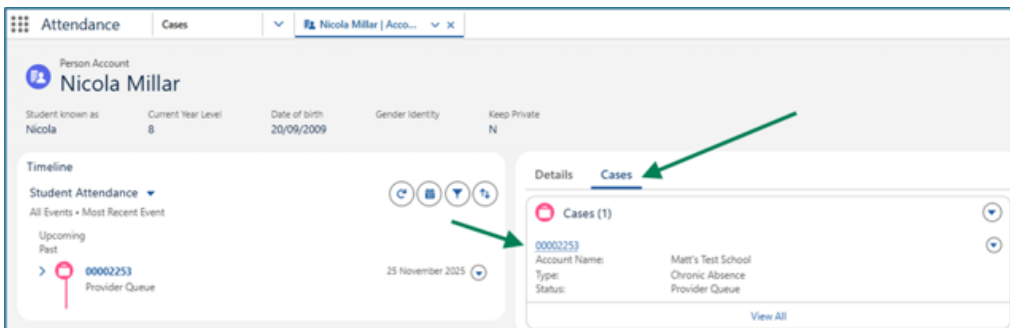
3. Select Accounts from the dropdown list



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.



20. Unable to change Case Owner

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.

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.



21. Emails should not be copied into Case Comments

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.

22. Information missing from NEN support request

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.

23. Home school exemptions in the AS-CMS

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	

24. Excluded Students

A case can't be created **because** a student has become excluded. If the school makes a referral for this reason, and there is no existing case, that referral will be rejected.

However, becoming excluded is **not a close reason for an existing case**, but the provider does not need to actively manage a case for an excluded child.

The provider should

1. Contact the Education Advisor who is working with that student to do a warm hand over. If they don't have the EA's details they can get them via their CRM or by contacting the regional office
2. Update the case notes to document what has been happening, then they can stop case management activity until the child re-enrols or a close reason becomes available.
3. The Education Advisor will work with that child to either get them involved in an alternative pathway (which will be one of the available close reasons for a case) or get them re-enrolled.
4. If the child becomes re-enrolled the service provider will pick up case management again. The provider can follow up with the Education Advisor for a handover meeting, if the EA hasn't organised one beforehand.

During this period the case should stay in an active status. Note that the Education Advisor has access to the same tools as the Attendance Service Provider, eg they don't need to ask the service provider to do information checks for them. They can contact the Ministry team directly to do this.

There are some options in the AS-CMS to help manage a case that is not being managed because the student has become excluded.

1. Use a Task set with a future date for a follow-up. This will come up in their Tasks panel at the bottom of your homepage, or they can add a Tasks list view (check guidance for how to add Tasks to the navigation items, if not there already). Or,
2. Under the Details tab, there are a couple of fields for 'Response Pending'. The available reasons don't include excluded students, but that is not a compulsory field, you can just add a due date for follow up. You can add this 'response due date' to your list view.
3. The provider can choose whether the case owner should hold onto the case in Open status, or if it should be sent back to the Provider Queue.

25. Conflicting information about student being in NZ

If the immigration check says the student is in NZ or unmatched and the caregiver has advised that the student is overseas, an in-depth manual Immigration check should be carried out.

Here are the steps that the provider needs to follow:

1. Ask the parents to provide documentation to support that the student is overseas (see documentation list below)
2. Once they have provided documentation add this to the case (Upload files or add in Comments)
3. Email CIT at non.enrolment@education.govt.nz with the case number and ask for a detailed immigration check using the information on the case.

Any of the following documentation will assist:

- travel document details
- date the student left NZ
- name the student travelled under
- student's passport number
- name/s of people travelling with them

The case should only be closed once/if it is confirmed that the student is not in the country.

26. Chronic Absence Case raised by school when child is not enrolled

Sometimes a case will be raised by a school that is not showing in ENROL as the currently enrolled school. This can happen when the new school enrolls a child before they are withdrawn from their previous school.

The new school enrolment will be held in 'Pending' status. ENROL will send a notification to the previous school with a request for them to withdraw the student. Once this is done, the enrolment at the school becomes final and the child shows as enrolled.

Points to note

- a new school is not supposed to enrol a student until they have attended the school. If they have carried out the enrolment process before they have turned up, and the child never shows up, there will be no NEN task sent to any school (because ENROL considers them to be enrolled).
- If a CA request is raised by a school for a child where the enrolment is 'Pending', it will appear as though they are raising a CA Request for a child who is not enrolled. This is not the case. It is fine for them to raise the request.
- If the child has never attended, then they should not have enrolled them and the case should be a NEN. The new school should withdraw the student, using the same date for Last Day of Attendance (LDA) that they used for First Day of Attendance (FDA). ENROL ignores these 'one-day enrolments' and will send a NEN task to the previous school once they complete the withdrawal.

27. NSN Numbers in the AS-CMS (Provider access)

We are not currently able to make the NSN available to providers via the Attendance Service CMS.

Legislation specifies that the NSN can only be used by a defined set of named users (see Education and Training Act 2020 Schedule 24 and Education (National Student Numbers) Notice (No. 2) 2024 - 2024-go6451 | New Zealand Gazette). Attendance Service Providers have not been specified in this list, so at this time it is not possible to show the NSN to service providers via the Attendance Service CMS. We continue to seek advice in this space.

We continue to review the link between ENROL and the AS-CMS to ensure that providers have access to all required ENROL data for the students that they are supporting.

The student's name and date of birth can be used to look up student details anywhere that the NSN can also be used. When the referral is created, the Student's name, date of birth and other

details are automatically copied directly from the National Student Index, so there is no opportunity to misspell the name when the case is created.

28. Using the Not Located flag

If you have exhausted available options to find the student - including checking with Immigration NZ, MSD, the Ministry of Education and previous school/s for any updated contact details, please flag the case as 'Not located' in the AS-CMS.

The Not Located flag provides visibility of the scale of the issue at a catchment, regional and national level, and this will help inform strategic and process decision-making.

You must retain ownership of cases in your catchment where the child has not been located. This is a particularly vulnerable cohort, and it is important that you retain visibility so that you can engage assistance via Multi-Agency forums, repeat MSD and Immigration checks, get notified if they become enrolled at a new school and take advantage of any new tools that become available.

29. The timeline is not showing all items

The timeline has a selector at the top where you can choose to view the Interactions or Records. If you are not seeing what you'd expect to on the timeline then use this selector to change what you are viewing. Refer to the [Quick Reference Guide](#) 'Navigating the Activity Timeline' for more detail.

