



Attendance Service Case Management System (AS-CMS) Process guidance for common scenarios

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Start here

Purpose + How to use this guide

This guide provides quick answers to common questions about managing cases in AS-CMS. It explains what to do in common scenarios and what to check if something is not working as you expect.

The guide is grouped by topic so you can quickly find what you need.

Use Ctrl+F (or Command+F) to search for keywords such as “Not Located”, “Transition”, “NEN”, “Primary Contact”, or “attendance”.

Step-by-step instructions

For step-by-step instructions (e.g. how to record Events or add Plans), use the [AS-CMS Quick Reference Guides](#) on the Ministry website.

Getting started & support

New Users

New users should start by completing the relevant training before using AS-CMS.

What to do

Check the online learning available on the Education LMS

- Go to the [Education LMS – External Dashboard page \(with login\)](#)
- Log in with your ESL
- Search for “Attendance”

Modules are available for:

- School users (The Online Attendance Service for Schools)
- In-school Providers
- Attendance Service Providers (Case Management for Attendance Services)

These modules explain:

- how to get access, and
- how to use the system

If you need additional support:

- Attendance Service Providers and In-School Providers: (Case Managers and Workflow Leads) can check the resources available on [Attendance service case management system guidance](#)
- School users: (Attendance Leads, School Primary Contacts and Office Support) can check the resources available on [Attendance services - Ministry of Education](#)

Service Desk support

The Service Desk can help with any remaining questions. They can:

- check that roles are set up properly
- make sure that required training has been completed
- answer common support queries

Contact details:

- Freephone: 0800 422 599 (NZ only)
- Email: service.desk@education.govt.nz

What happens next

The Service Desk will escalate anything they can't solve:

- to the **technical team** (if it is a system issue), or
- to the **National Attendance Service team** if additional support is required

Case lifecycle (status, transition, closing)

CA case created for a student who is not enrolled

What this means

There are some situations where a school can create a CA case when the student is not currently enrolled.

What to do

- The case should be closed (rejected)
- Contact the previous school and advise them to raise a NEN
- You may need to work with the original referring school to support this process
 - particularly if the previous school is not in your catchment

Students attending Alternative Education

Students attending Alternative Education will also be enrolled in a school.

If you have an attendance case for a student attending Alternative Education, you can manage the case in the same way as any other case where the student is enrolled.

- The case may be moved to Transition if the student is attending regularly or is engaged in the school's AMP process.
- The case can remain in Transition while you check in to see whether things stabilise further.
- The case can be closed once a closure reason has been met, for example 'Regular attendance' or 'Engagement stable'.

Excluded Students

What this means

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.

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.

What to do

The provider should:

1. Contact the **Education Advisor (EA)** who is working with the student to do a warm handover
 - If you don't have the EA's details, you can get them via your CRM or by contacting the regional office
2. Update the case notes to document what has been happening
3. Move the case to **Transition status** and stop active case management until the student re-enrols or a close reason becomes available
4. If the student becomes re-enrolled:
 - arrange a **Transition meeting with the new school**
 - continue case management in line with other Transition cases
 - follow up with the Education Advisor for a handover meeting if one has not already been arranged

The Education Advisor will:

- work with that child to get them into an alternative pathway (which may become a valid close reason), or
- support re-enrolment

Managing the case while inactive

During this period:

- the case should stay in an active status.

Important

- The Education Advisor has access to the same tools as you do (for example, they can complete information checks directly and do not need to request these through you)

Options to manage follow-up

You can:

- Use a Task with a future follow-up date – this will come up in the Tasks panel at the bottom of your homepage
- Use the 'Response Pending' fields to set a due date – add a due date for follow up

Activity **Details** Related Enrolment History Support Requests Daily Attendance Termly Attendance

Case Information

Not Located Name _____

Parent Case _____ Current School _____

_____ Catchment _____

Additional Information

CIT Owned Reallocation Reason

ISP Attendance Case Response Pending _____

ASA Closed Date _____ Response Pending _____

Response Due Date _____

Response Due Date _____

- Keep the case with the current Case Owner or return it to the Provider Queue

Moving to Transition Status

What this means

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.

What to do

- Arrange a Transition meeting with the school
- At this meeting
 - hand over the student plan
 - provide the school with any information they need to support the student back into regular attendance via the processes in their Attendance Management Plan.

This is especially important where 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
- putting an individual attendance management plan in place early on.

Agree next steps with the school

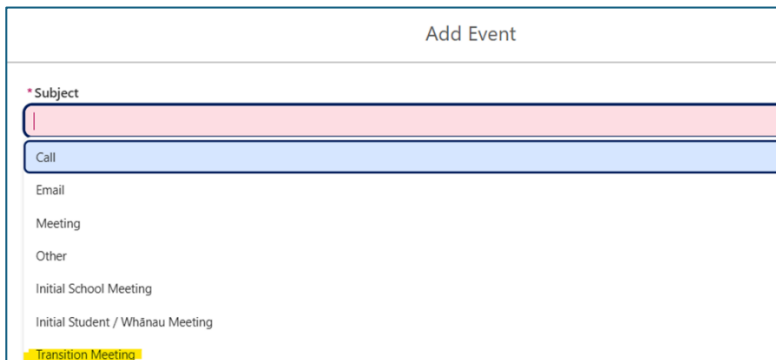
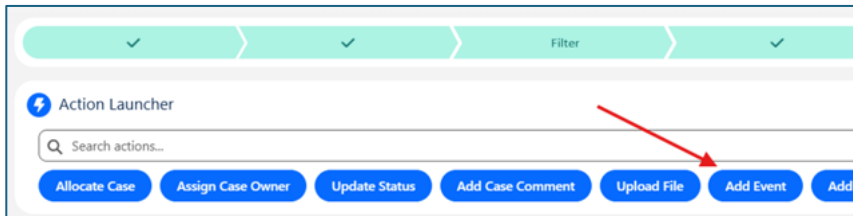
This is also where you can agree with the school about when they should make a new CA support request, to change the case to a CA so you can keep working with the student.

- In most cases the school would aim to support the student themselves using the approach defined in their Attendance Management Plan
- The school may call the provider back in if they are unable to get engagement or attendance is already very concerning.

Note – a school with In-School Provision can choose to allocate the CA to their ISP instead of to their catchment service provider.

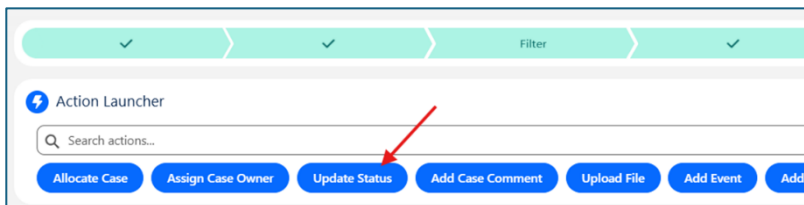
Recording in AS-CMS

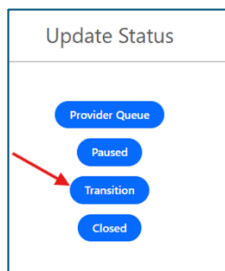
- The Transition Meeting is an event type that can be selected from the drop-down list when the user clicks into the Subject line of an event.
- You can find ‘Add Event’ on the Action Launcher.



After the Transition Meeting:

- 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 you worked with the student and school to get them enrolled) or
 - Other enrolment (where the student and caregivers got themselves re-enrolled independently).

Closing a case

What this means

Withdrawing from a school (CA case) or enrolling (NEN case) are no longer close reasons.

A case can be closed when

- The student is attending regularly, or
- Attendance and engagement have stabilised and the school is able to support the student via their Attendance Management Plan processes, or
- Other close criteria have been met, i.e. the student:
 - is confirmed to be overseas and you don't know that it is temporary, or
 - has an active homeschool, early leaving or other exemption, or
 - is deceased, or
 - has enrolled at a school that is out of scope for the attendance service (Te Kura, a Private school or a Charter school), or
 - has turned 16 and no longer wishes to attend.

If no close reason applies

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.

Important context

These close criteria apply to both Chronic Absence (CA) and Non-Enrolment Notification (NEN) case types. Some examples of key changes from the previous attendance model are:

- 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.

Manually re-open a closed case

What this means

The case may be reopened only if it has been closed in error.

Examples of when a case may be considered closed in error include:

- The case did not meet the criteria for closure at the time it was closed
- The case was closed before important information or actions could be recorded (for example, UBNF entries).

What to do

- Contact the Service Desk and request that the case is re-opened.

What will not be reopened

- Cases that were closed correctly but where the student later requires additional support

In this situation:

- the school must submit a new CA request to initiate a new case.

Catchments, providers & allocation

Using the Catchment Map

What this means

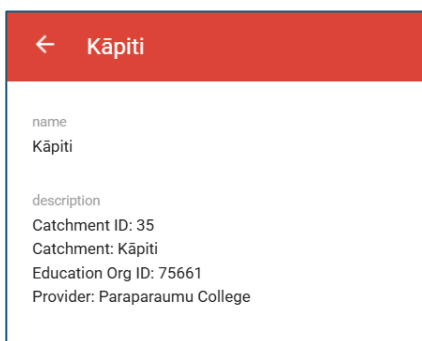
The [catchment map](#) is a published tool to help you:

- check which catchment a case should belong to
- find contact details for other service providers
- find out which catchment is related to a specific school

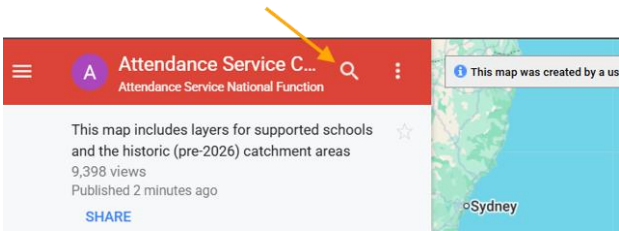
Check this map before reallocating a case to CIT if you think it should have gone to neighbouring catchment – sometimes the boundaries are not exactly where you expect.

What to do

- Click anywhere on the map to open the catchment information panel
 - This gives you the name of the catchment and the associated provider.



- To find an address or a school:
 - click on the search icon
 - enter the school name or address



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

Important

You should always contact the new provider and organise a time to provide a handover before reallocating a case.

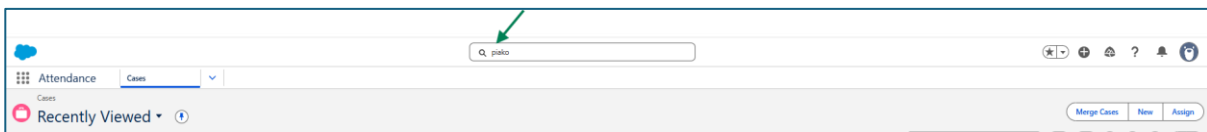
Finding a catchment provider in the AS-CMS

What this means

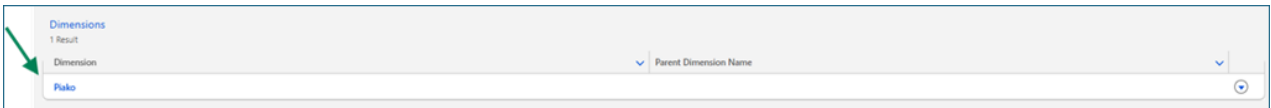
Service provider contact details are available in AS-CMS and can be used when reallocating or receiving cases.

What to do

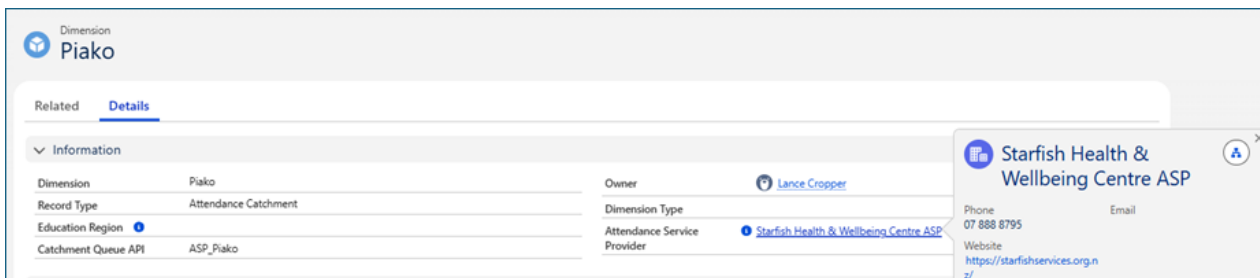
- enter the catchment name into the global search



- select the result under 'Dimension'



- open the catchment record to view provider details



If you are unsure of the provider name use the [catchment map](#) first.

Additional information

- 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 contact the Service Desk

Finding a school's contact details in the AS-CMS

You can find school contact details by:

- clicking on the link to the school record from your case record or
- typing the school name into the global search at the top of your AS-CMS screen

Student has enrolled outside of catchment

What this means

If a child is enrolled at a school outside your catchment, the case should be reallocated to the provider for the new catchment.

What to check

The Details tab on the case will show:

- the Out of Catchment flag is ticked
- the Current School Catchment field shows the new catchment
- the New Provider field shows the provider for that catchment

Next steps:

1. Click the link to see the contact details for the new provider
2. Contact the new provider before reallocating the case
 - arrange a handover meeting if you have been working with the student
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).

Important

To allocate the case to another provider:

- the child must be recorded in ENROL by the new school.

You cannot reallocate a case if:

- the Out of Catchment box is not ticked or
- the child is not currently enrolled or
- the enrolled school is inside your catchment

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.

Student has moved catchments but is not enrolled

What this means

If a student is not enrolled and may have moved to another catchment, the case cannot be allocated directly to another provider. Instead, it may need to be allocated via **CIT**, depending on what information is available.

When this applies

- You have a **confirmed address** outside your catchment, or
- You have **reasonable grounds** to believe the student is in another catchment **and** the receiving provider agrees to accept the case

What to do

- Follow the process in Allocating cases to CIT
- Make sure any known address or location information is recorded on the case before reallocating

Allocating cases to CIT

CIT is used to transfer a case when the student is in another catchment but cannot yet be allocated directly to a provider.

When to allocate to CIT

- You have **confirmed a new address** outside your catchment, or
- You have reasonable grounds to believe the student is in another catchment and the receiving provider agrees to accept the case

What to do

If another provider agrees to accept the case:

- allocate the case to CIT
- 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 enough information

Do not allocate the case to CIT. Instead:

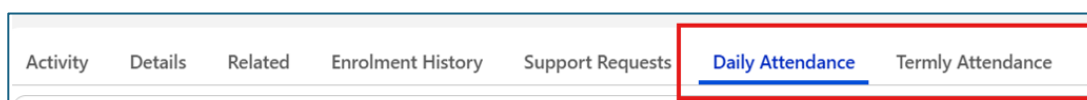
- complete information checks
- continue to follow the operational guidance for Locating students and whānau
- if all efforts fail to locate the student, apply the Not Located flag.

Finding information (attendance, tasks, timeline)

Attendance Data

What this means

Attendance data 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.

Attendance information is displayed as two tabs within each case record; Daily Attendance and Termly Attendance.

Note:

- A new case will not have any attendance data until the following morning

Daily attendance

What you can see

- a graph showing cumulative attendance over the course of the term
- a table that includes attendance code for each day submitted by the school
- A separate table listing the last five years of stand downs and suspensions

Important information

- A stand down or suspension uses the attendance code 'U'
- This will be visible in the daily attendance table below the graph
- A separate table lists out the last five years.
- Attendance data may be submitted by a school before they have updated ENROL
 - this makes attendance data a useful check for non-enrolled students.

Attendance codes

Information about attendance codes can be found here: [Attendance codes - Ministry of Education](#)

Useful information (how attendance is recorded and displayed)

- Attendance is recorded by schools in minutes.
- The data sent by schools includes:
 - the attendance code, and
 - how many minutes of the school day have been attributed to that code
- The Ministry rolls these reports up into 'half days' based on how much time has been reported by the school under each code

The Half Day calculations only have three categories:

- Present
- Justified Absence
- Unjustified Absence
- The daily attendance data counts the number of half-days the child is present at school
 - If they are there for the full day, it will increase by two
 - If they are there for half a day, it will increase by one.

Termly attendance

Termly attendance provides a view of a student's attendance patterns over the last 12 months.

What to use it for

This information is intended to:

- support day-to-day conversations with students, caregivers, and schools
- help locate non-enrolled students
- 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
- the 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

What to do

If you are unsure:

- contact the school
- they can explain what attendance data they are sending to the Ministry

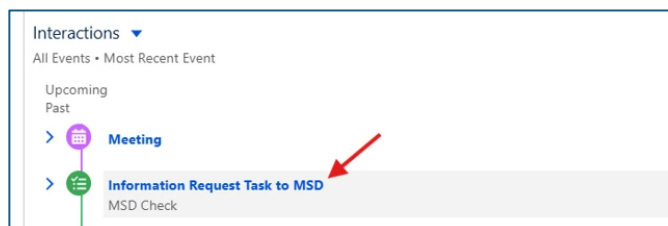
Finding Information Request results

What this means

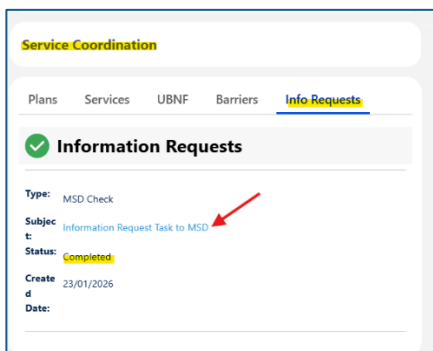
When an Information Check result is returned for one of your cases you (the case owner) will receive an in-app notification.

What to do

1. Check that the results have been returned. You can tell this from the task status:
 - **Requested** – request created but not yet sent
 - Immigration requests are sent weekly
 - MSD requests are sent daily
 - **Open** – sent the agency, awaiting response
 - **Completed** – response has been received and uploaded
2. Open the task
 - Click on the notification, or
 - Open the task from
 - The timeline, or



- The Info Requests section of the case record



3. Review the results.

- For an Immigration Request
 - look for Immigration Status and Carrier Date
- For an MSD Request
 - look for Comments

4. Update contact details (if needed)

- If you receive contact details from MSD:
 - update or add the case contact
- It is important to keep contact details up to date so they are available if the case is reassigned or re-opened

Understanding Immigration Info Request results

Immigration checks will return one of three results - Out, In or Unmatched.

Outcome	Description
OUT	Student has been matched and is out of the country according to known travel records. Results will include the Carrier Date (date the child left).
UNMATCHED	The checking process has not been able to find this person. This could be because there is no record, multiple matches exist, or travel occurred under a different name or DOB.
IN	Student has been matched and is in the country according to known travel records. Results will include the Carrier Date (date the child arrived).

If result is UNMATCHED

- Contact the family to gather more information
- Add details to the case record (case comment)
- Notify CIT (non.enrolment@education.govt.nz) with the case number

CIT can then:

- pick up the additional details
- request a manual detailed check from Immigration

Using the Not Located flag

If you have exhausted available options to find the student, including checking with:

- Immigration NZ
- MSD
- previous schools
- your other networks
- for any updated contact details,

you should flag the case as 'Not located' in the AS-CMS.

Important

- The Not Located flag provides visibility of the scale of the issue at:
 - catchment
 - regional
 - national level,
- This supports strategic and process decision-making.

You must still retain ownership of cases in your catchment where the child has not been located.

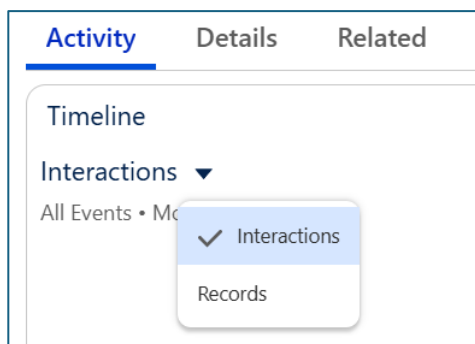
This is a particularly vulnerable cohort, and it is important that you retain visibility so that you can:

- engage assistance via Multi-Agency forums
- repeat MSD and Immigration checks
- be notified if the student enrolls at a new school
- take advantage of any new tools that become available.

The timeline is not showing all items

The timeline has a selector at the top where you can choose to view:

- Interactions, or
- Records



If you are not seeing what you expect:

- change the selector and check again

Refer to the [Quick Reference Guide 'Navigating the Activity Timeline'](#) for more detail.

Technical support updates shown on the timeline

What this means

You may occasionally see updates made to a case by a Ministry of Education technical support team member.

These updates happen when system issues are being investigated or resolved and are expected.

What to expect

- Changes made as part of a support action may appear in the case history
- In most cases, these changes will show under a name with a prefix such as **“MoE Technical Support”** (or similar)

In some situations, a change may appear under an individual staff member’s name without this prefix.

What to do

- If you see an update made by an unfamiliar user:
 - check the case history and recent activity for context
- In most cases, these updates will relate to a technical support action and do not require any action from you
- If you are unsure about a change, or have any concerns:
 - contact the Service Desk for clarification

Contacts, enrolment & referral details

Updating Primary Contact on a case record

What this means

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 the school's Delegated Authoriser.

You can't tell which school users have this role, so it is not possible for you to maintain that field.

What to do

- Contact the school where the Primary Contact needs to be updated

If the information is incorrect

If the child is no longer enrolled at the school, and the Primary Contact from a previous school is still showing, contact the Service Desk to resolve

Incorrect Student Details

What this means

The AS-CMS uses ENROL as its 'source of truth' for student details.

If there are errors in:

- Name
- date of birth
- enrolment history

this means the information has been recorded incorrectly in ENROL.

What to do

- Contact the current, or most recent, school
- Ask them to check and correct the information in ENROL

Finding details in new NEN cases

What this means

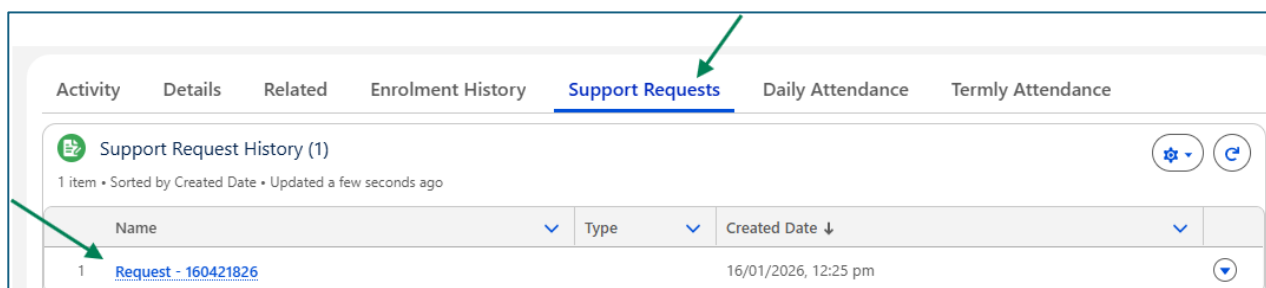
New (non-migrated) NEN cases are now created directly in AS-CMS and have not previously existed in ASA (the previous Attendance System, now decommissioned).

What to do

- Go to the **Support Requests** tab
- Click the link to open the NEN referral record

You will find:

- contact details
- referral information



Important limitation

It is not currently possible for Contacts to be created automatically in AS-CMS from the NEN form.

What to do

- Create Contacts manually using the Add Contact button on the Action Launcher.

Where to find information

Some information for new NENs also appears in different parts of the case:

- **Enrolment History tab**
 - last attended date
- **Details tab**
 - Referrer comment
 - Referrer contact information

If information is missing

- Contact the referring school to see if they hold additional contact details

Conflicting information about student being in NZ

What this means

There may be differences between Immigration information and what caregivers report about whether a student is in New Zealand.

What to do

- Ask the family / caregiver to provide supporting documentation
- Add the documentation to the case (upload files or add to comments)
- Email CIT (non.enrolment@education.govt.nz) with:
 - the case number
 - a request for a detailed immigration check

Useful documentation includes:

- travel document details
- date the student left New Zealand
- name the student travelled under
- passport number
- names of people travelling with them

Important

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

NSN Numbers in the AS-CMS (Provider access)

What this means

NSN (National Student Number) is not available in AS-CMS.

Why this is the case

Legislation restricts the use of NSN to a defined set of users.

Attendance Service Providers are not currently included, so NSN cannot be shown in AS-CMS.

What to do instead

- Use the student's:
 - name
 - date of birth

to look up student details where required

Important

- When a referral is created, the student's details are copied from the National Student Index
- This means names and dates of birth are accurate and consistently recorded

Additional information

Work is ongoing to review the link between ENROL and AS-CMS to ensure providers have access to the data they need.

Reporting & dashboards

Creating custom reports

There are two ways to create the report you want. You can either:

- Adapt an existing report, or
- Create a new report from scratch

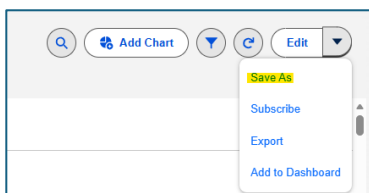
Adapt an existing report

A simple way to create a new report is to start with an existing report that holds roughly the information you need, but perhaps:

- is missing some fields
- needs different filters or
- could be arranged in a more useful way for your current purpose.

What to do

- Open the report you want to start from
- Click on the drop-down arrow beside the Edit button
- Select Save As.



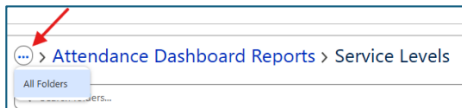
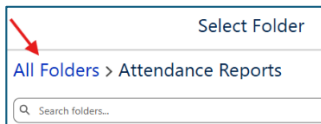
Set up your report

- Give the report a clear name
- Update the description to explain what the report contains

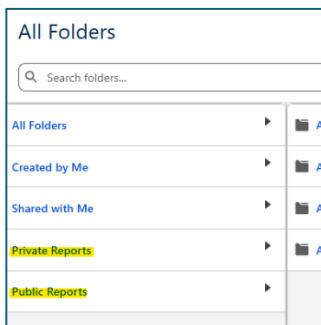
As you build up more reports over time, these descriptions become very useful, so include as much relevant detail as possible.

Choose where to save the report

- Click **Select Folder**
- In the window that opens
 - Check the breadcrumbs at the top left
 - Select **All Folders** (you may need to click the three dots to display this option)



- Select:
 - **Private Reports** if the report does not need to be shared
 - **Public Reports** if it should be shared



Reports saved in the Public folder:

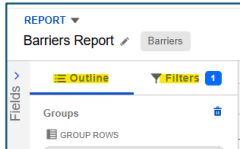
- can be accessed by all AS-CMS users
- but users will only see data they have permission to access

Example:

If a report is filtered to your catchment, another provider can open the report but will see no results.

Edit and run the report

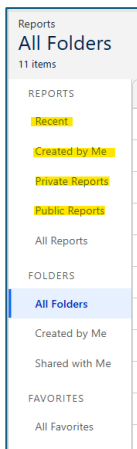
- Click **Edit** to open the edit panel
- Update:
 - report columns (outline)
 - filters
- Click **Save and Run** to save your changes and refresh the report.



Where to find your reports

Reports you create can be found in:

- **Created by Me**
- **Recent**
- The folder you selected (Private or Public).



Create a New Report

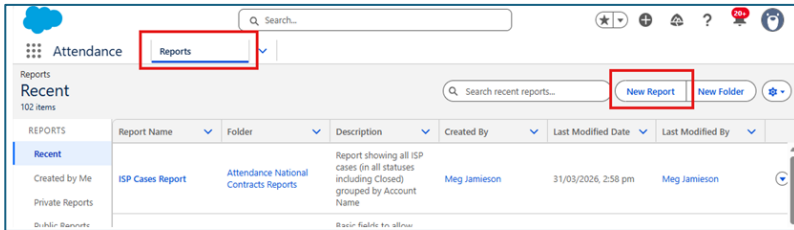
In some cases, you may need a report that is quite different from the standard reports available.

The **New Report** feature allows you to:

- create custom reports
- bring together data from multiple objects

What to do

- Select **Reports** from the navigation menu
- From the Reports page or any report folder, select **New Report**.



Choosing a report type

Selecting New Report opens a screen where you choose the type of report you want to create.

AS-CMS stores data across several linked objects. For example:

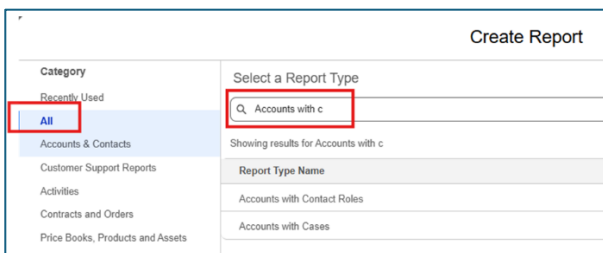
- student personal information is held in the **Account** record
- case lifecycle details such as case type, catchment, ownership, and status are held in the **Case** record
- activities (meetings and tasks) are stored in separate objects

To create a report that includes information from more than one object:

- choose a report type that already links those objects

Example

- use **Accounts with Cases** to display demographic information alongside case details



Before selecting a report type:

- make sure the filter on the left-hand side is set to **All** (not **Recently Used**)
- then:
 - scroll through the options or
 - use the search bar at the top to find the report type you need

Sorting by Student Age and Case Age

When using list views and reports:

- the Case Age and Student Age fields are sorted alphabetically (not numerically)

This means:

- 1 is followed by 10, then 11, then 2, then 20 etc.

What to do instead

- Sort by Created Date instead of Case Age
 - may appear as Date/Time Created
- Sort by Student Birthdate instead of Student Age
 - may appear as Date of Birth or DOB

Note: In some reports, it may not be possible to add Student Birthdate

Using the Quarter 1 Interim Dashboard for Q1 reports

The [Operational Guidance webpage](#) includes help to find and use the dashboard. The [Quarterly Reporting](#) section includes:

- link to the Attendance Service quarter 1 report guidance document
- detailed instructions can be found in Appendix B, from page 8.

Additional support

- Your Contract and Relationship Manager may be able to provide
 - a link to a recorded drop-in session
 - additional guidance on how to use the dashboard

Business Day Calculations in Reporting Dashboards

The reporting dashboards do not always calculate business days in the same way as defined in your contract.

What to check

- Q1 dashboard
 - excludes weekends
 - does not exclude public holidays
- Q2 dashboard
 - excludes weekends and national public holidays
 - does not account for regional public holidays.

Important

Your Service Provider contract defines business days as excluding:

- weekends
- national public holidays
- regional public holidays

If your service levels appear to be affected due to how public holidays are accounted for:

- you should raise this in your report

Note

- Business days include school holidays

System navigation & productivity

Using AS-CMS on mobile or tablet

What this means

The Attendance CMS cannot be accessed using a mobile app.

What to do

- If using a tablet or iPad, use a web browser instead:
 - Safari
 - Edge
 - Chrome
- Use the same links to:
 - access your ESL account
 - log into AS-CMS

What to check

- The layout has not been designed for a phone screen
- A tablet display should look similar to a laptop, depending on screen size

Change how your name appears in the AS-CMS

What this means

Your AS-CMS profile is created using the name from your ESL account, but this can be changed.

What to do

- Log into AS-CMS
- Click on the bear icon in the top right corner
- Select Settings
- Open Personal Information (if not already displayed)
- Update your name as required

Update contact details for a service provider

What this means

The AS-CMS includes contact details for service providers. Users can search for a provider, open their account record, and see their contact phone number, email address and website. These details are used by the Ministry and other providers to make contact when reallocating cases, and for other reasons.

What to do

If you want to update these details, email the following to the Service Desk: -

- Org id – this can be found on the [Google map](#)
- Provider name
- Provider phone number
- Provider website – if applicable
- Provider email address

Important

Personal email addresses are not suitable, as it is important that the provider can be contacted at times when an individual may be on leave, unwell, or has left the organisation.

Close all tabs

What this means

AS-CMS opens a new tab when you navigate between screens. This can result in many tabs being open at once.

What to do

- Press **Shift + W** to close all open tabs

What to check

- This shortcut will not work if you are editing a field
- Save your changes before closing tabs

Searching for a case by student name

What this means

The global search can be used to find student records, but results depend on the search scope.

What to do

- Click in the search box at the top of the screen
- Change the search scope:
 - click the arrow next to **Search All**
 - select **Accounts**
- Start typing the student's name
- Select the correct result

This opens the student's profile page.

To open the case

- Click the **Cases** tab
- Select the case number

Unable to change Case Owner

What this means

Case ownership cannot be changed directly from one person to another.

What to do

1. Check the current case status
 - If the status is not **Provider Queue**:
 - use the **Update Status** action from the Action Launcher
 - change the status to **Provider Queue**
 - use the Assign Case button on the Action Launcher to assign a case owner
 - If the status is already **Provider Queue**:
 - Check whether the Case Owner is:
 - blank, or
 - an ASP Queue
 - Try assigning the Case Owner again

If it still doesn't work

- If the Case Owner is still a person, or reassignment fails:
 - contact the Service Desk
 - they can request a manual fix
- Once the fix is completed, you will be able to reassign the case

Emails should not be copied into Case Comments

What this means

Copying email chains into Case Comments can cause the timeline to stop displaying.

This happens because email content may include elements that cannot be handled by case comments.

What to do instead

- Attach emails using the **Upload File** function from the Action Launcher
- Do not copy and paste emails into Case Comments

If this occurs

- Contact the Service Desk
- You can still access Case Comments via the **Related** tab while the timeline is affected

AS-CMS Calendar is not available

What this means

AS-CMS includes a calendar function, but it is not currently available for use.

What to expect

- Calendar functionality is on the development roadmap
- There is no confirmed release timeline

Other reference

Access to historic (pre-01/01/2026) attendance cases

What this means

The AS-CMS does not contain a complete archive of ASA records.

What data has been migrated

The following records were migrated into AS-CMS:

- Cases that were in an open/active status between **12 October and 12 December 2025**, and
- Historic cases for students who had a case in an open/active status between **12 October and 12 December 2025**, and
- Any other cases that had been closed on or after **1 January 2022**, excluding students that were over 16 and were no longer enrolled as at **12 December 2025**

What to expect

- Within those case records, only data that was recognised as being related to case management was migrated

Note

- Edit access to ASA ended on 12 December 2025