Te Tāhuhu o te Mātauranga
Ministry of Education

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Attendance School Service Portal: Quick Reference Guide

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Schools online learning module

An online learning module has been developed to support school users to submit Chronic Absence requests for support through the Attendance Service CMS. The module also outlines how to manage a case once it has been created, including how to view shared information and engage with the provider.

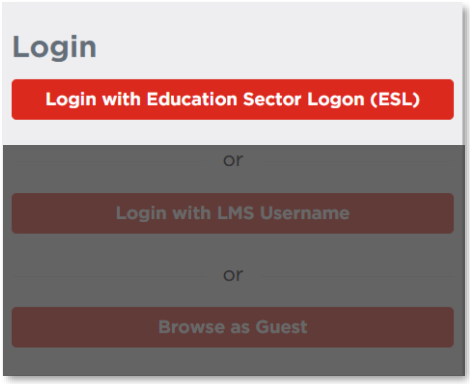
Access to the online learning module

This guide will help you log into the Ministry of Education's learning platform to access the Online Attendance Service for Schools online learning module.

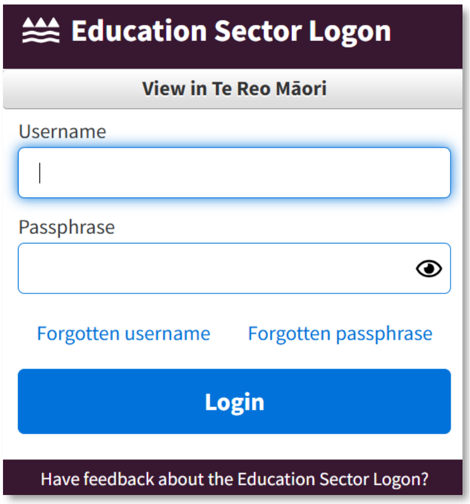
- **You need an Education Sector Login (ESL)** to access the module. If you don't have an ESL, speak to your organisations Delegated Authoriser who will help you get set up.
- **This module will help** you become familiar with the features of the Attendance Service website for submitting chronic absence support requests for your school.

Follow the steps below to access the access the module.

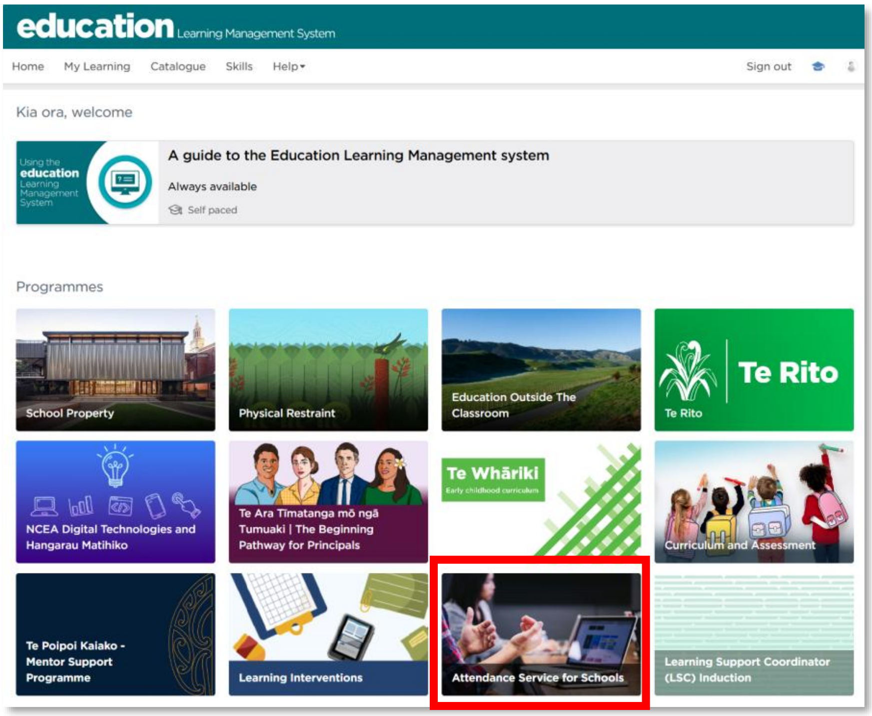
1. Go to Ministry of Education Learning and click **Login with Education Sector Logon (ESL)**



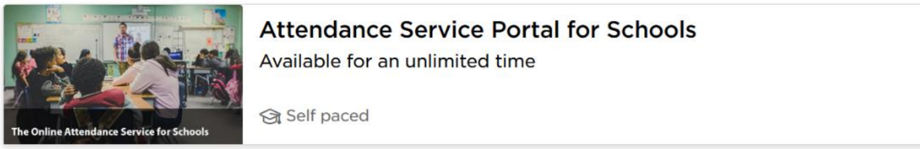
2. Enter your **ESL username** and **Passphrase**



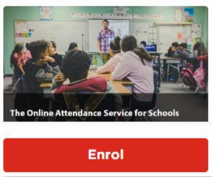
3. When you successfully login, click on the **Attendance Service for Schools tile**



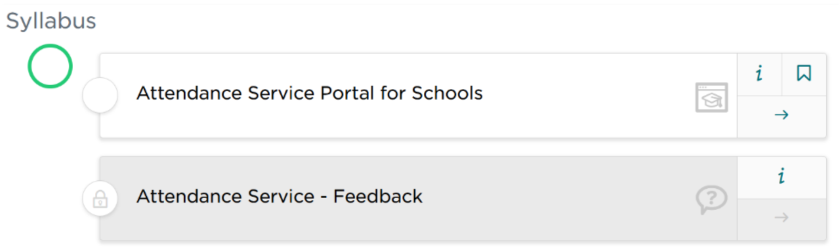
4. Click on **The Attendance Service Portal for Schools** course



5. Click **Enrol**



6. Click **The Attendance Service Portal for Schools** to launch the online learning module.



Submit a Chronic Absence request for support

Who can perform this task:
School users with the **Primary Contact**, **Office Support**, or **Attendance Lead** role.

Purpose:
Use the Chronic Absence Request for Support form to engage support for a student from your local Attendance Service provider (or your In-School Provision, if you have one).

Submitting a form creates a case record. The case record is sent directly to your service provider, who will assign a case manager.

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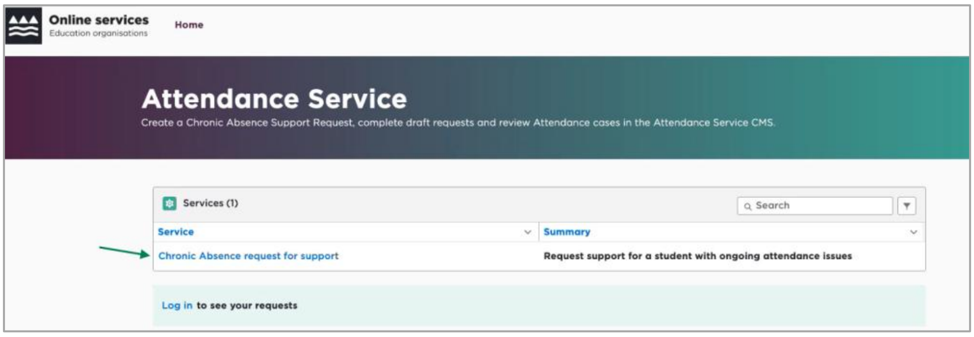
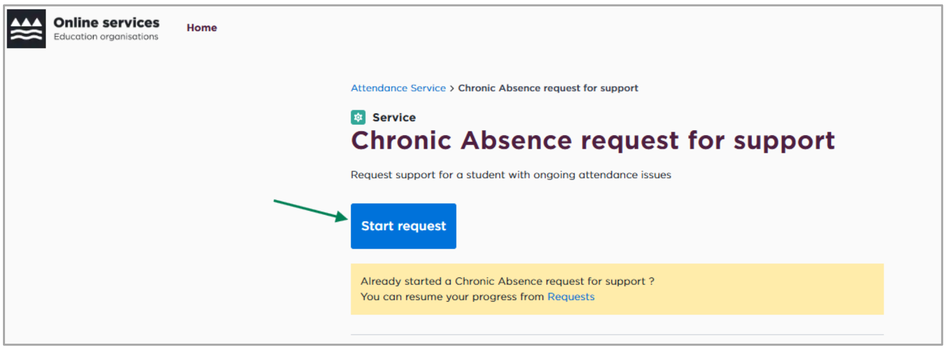
1. Click on this link to open the Attendance Service page: Attendance Service
2. In the Service section click on 'Chronic Absence request for support'



3. You can review the information on the page, then when you are ready to open the request form click on the Start Request button.



4. Each page of the form has instructions on what to enter. Once you have completed the form, click Submit.
5. **Note:** The form will ask you to name a Primary Contact person at the school. This is the person at the school who will be contacted and kept up-to-date by the Case Manager. This person must either have the Attendance Service Case Management System (AS-CMS) role of **Primary Contact** or **Attendance Lead**.

Next steps: when the form is submitted a case is created in the AS-CMS. The case will be allocated to the provider and assigned a case owner. The case owner will then contact the person who has been named on the form as the Primary Contact at your school.

Add a case comment

Who can perform this task:
A case record is created after a Chronic Absence request for support has been submitted by the school. School users with the **Office Support**, or **Attendance Lead** role can add Comments to case records for any students who are currently enrolled at their school.

School users with the **Primary Contact** role can add Comments only on cases where they are listed as the Primary Contact.

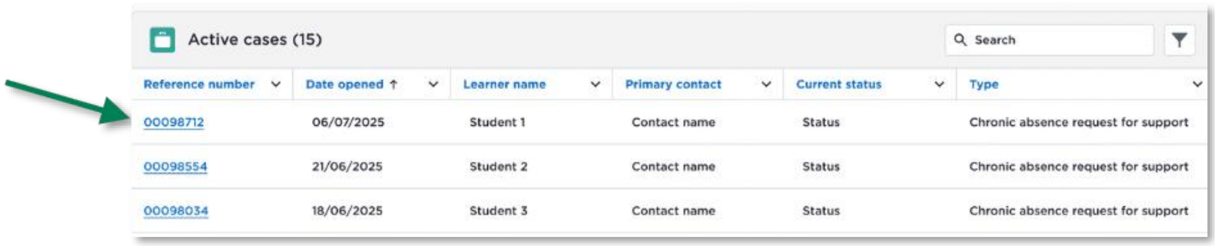
Purpose:
Use Case Comments to record relevant updates, and observations throughout the life of a case. Comments added by school users are visible to the Attendance Service provider, and the Case Manager will receive a notification when a new comment is added.

Expectations:

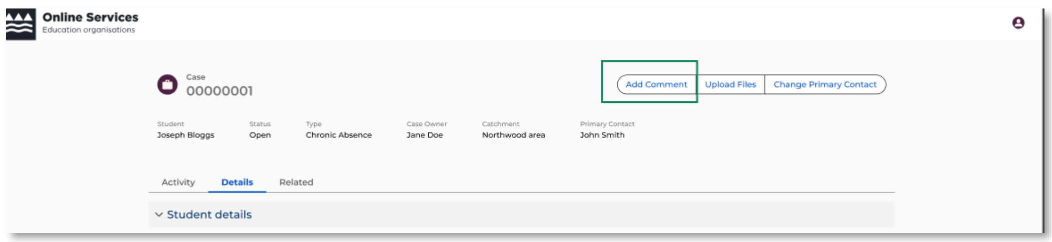
- Add Comments to share relevant information with the Case Manager (Attendance Service provider)
- Be proactive in sharing when it supports planning or action.
- Ensure all Comments are accurate and up to date.

Steps:

1. In the Active cases list – use filters or the search field to locate the case you want to add a Comment to. Click the case number to open it.



2. Click 'Add Comment' in the top right corner of the case screen.



3. Type your message in the comment box.
4. Once your Comment is complete, click **Submit**.

5. You will see your comment appear in the case timeline and the Case Manager will be notified of your update.
6. Your comment will be visible to:
    - the service provider Case Manager or Workflow Lead
    - the school Primary Contact for the case
    - the school Attendance Lead role.

Tips:

- Use comments to share updates, ask questions, or respond to Provider communication.
- If you need to share a file, use the **Upload Files** feature instead.

Upload files to a case

Note – currently you cannot upload a file to a case from the case view. This feature will become available after a future release.

Who can perform this task:

A case record is created after a request for support has been submitted by the school. School users with the **Office Support**, or **Attendance Lead** role can add files to case records for any students who are currently enrolled at their school.

School users with the **Primary Contact** role can add files only on cases where they are listed as the Primary Contact.

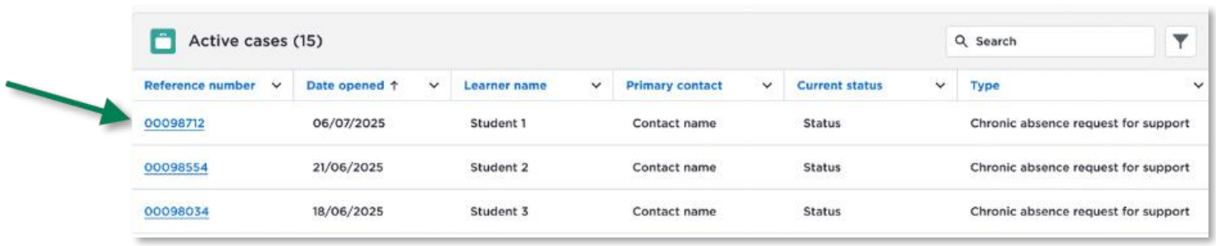
Purpose:
Upload files to a case within the CMS to ensure a complete case history. This includes uploading files such as letters and emails received outside the system, application forms, and other case-related materials.

Expectations:

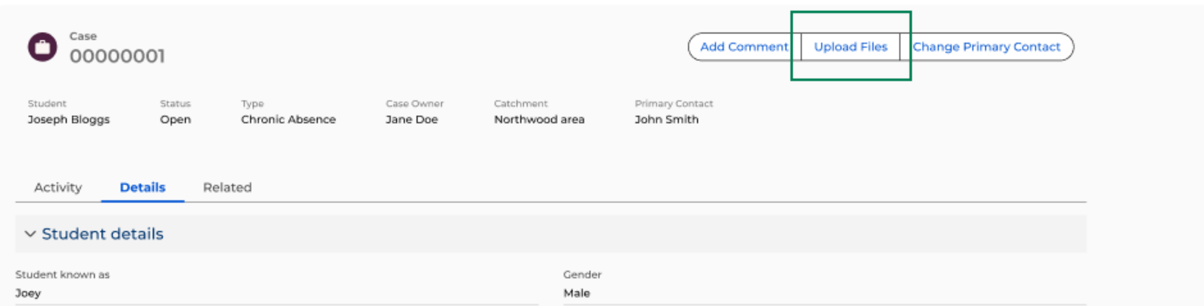
- Share any relevant files to the case, including correspondence and application forms.
- Ensure files are linked to the correct case. It is critically important that personal or sensitive content is only ever recorded in the correct case record, to prevent data breaches.
- Ensure files are appropriately named. Cases may have many files attached over time, so using a clear and descriptive file name makes them easier to find and manage.

Steps:

1. In the Active cases list – use filters or the search field to locate the case you want to update. Click the case number to open it.



2. In the top right corner of the case screen, click the Upload Files button. A file picker will open.



3. Select the file(s) from your device and click ‘Open’. Note: Most common file types can be uploaded. The maximum file size for any one file is 20mb.
4. Once the file has uploaded click ‘Done’.
5. To complete the upload process, click the Next button.
6. The uploaded file will appear on the timeline. The Case Manager will be notified of the new file.
7. The uploaded file will be visible to

- the service provider Case Manager or Workflow Lead
- the school Primary Contact for the case
- the school Attendance Lead role.

Change the Primary Contact

Note – currently you cannot change the Primary Contact. This feature will become available after a future release. In the meantime, add a comment to the case to let the provider know who to contact at the school.

Who can perform this task:

School users with the **Office Support**, or **Attendance Lead** role can change the Primary Contact on case records for any student currently enrolled at their school.

School users with the **Primary Contact** role can change the Primary Contact only on cases where they are listed as the Primary Contact.

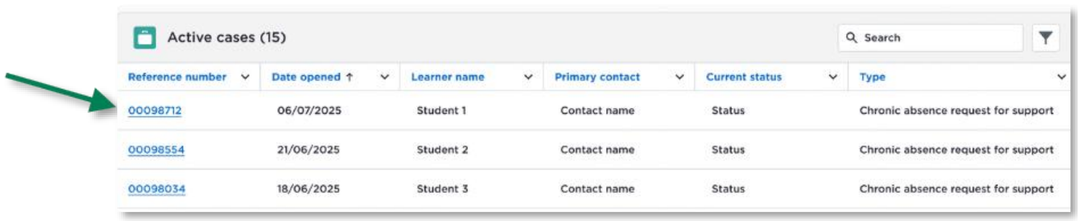
Purpose:
Each case has a designated Primary Contact, who acts as the main point of communication between the school and the provider for that student. Use this function to update the Primary Contact for a case when that person is changing.

Expectations:

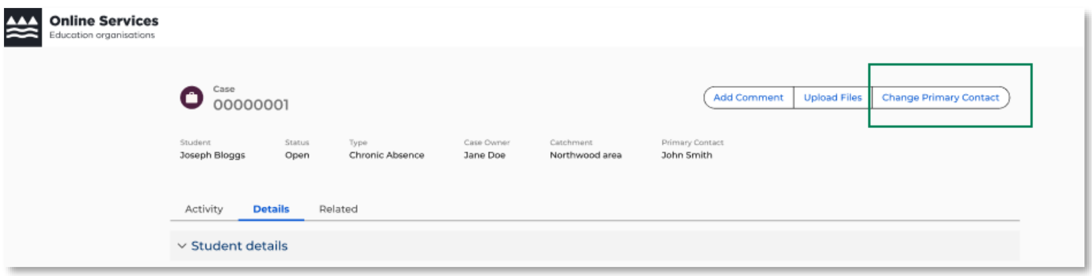
- Select the appropriate person as the Primary Contact for each case – this is the person who will working most closely with Provider to support the student.
- Keep the Primary Contact information up to date throughout the life of the case if this information changes.
- Note: the Primary Contact must have access to the Attendance Service CMS. Your school's Delegated Authoriser can arrange this.

Steps:

1. In the Active cases list – use filters or the search field to locate the case you want to update. Click the case number or subject to open it.



2. In the top right corner of the case screen, click the Change Primary Contact button.



3. Search for the new contact in the School Primary Contact Name field – type the name of the person you want to assign. **Click Find Contact** to search.

   Note: The person must have access to the Attendance Service CMS to appear in the search results. Speak to your school's Delegated Authoriser if you can't find the person you are looking for.

4. **Check contact details and edit if required**:
   - Phone Number
   - Email address

5. **Add notes (optional):** Include any relevant notes, such as preferred method of contact or best times to reach them.

6. **Click 'Change Contact'**: Confirm the update by clicking Change Contact. The new Primary Contact will now be recorded on the case.

Tips:

- If the person does not appear in the search, contact your Delegated Authoriser (DA). The DA can check the ESLs and set the user up with Attendance Service CMS access.
- You can update the Primary Contact at any time as responsibilities change.
- You can use the Change Primary Contact button to update contact details for the current Primary Contact for example when the contact person is not changing but their contact details are.

View shared content on a case

Who can perform this task:

School users with Primary Contact or Attendance Lead roles can view shared content on their school's cases.

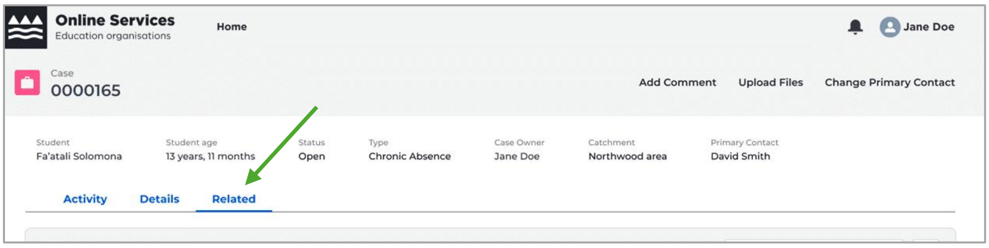
Purpose:
Use this function to view Comments and Files that have been shared with your school on a case. This helps you stay up to date with provider actions, information requests, and documents relevant to supporting the student.

Expectations:

- Review shared Comments and Files regularly so you are aware of updates from the provider
- Remember: Only content that has been intentionally shared will be visible to school users.

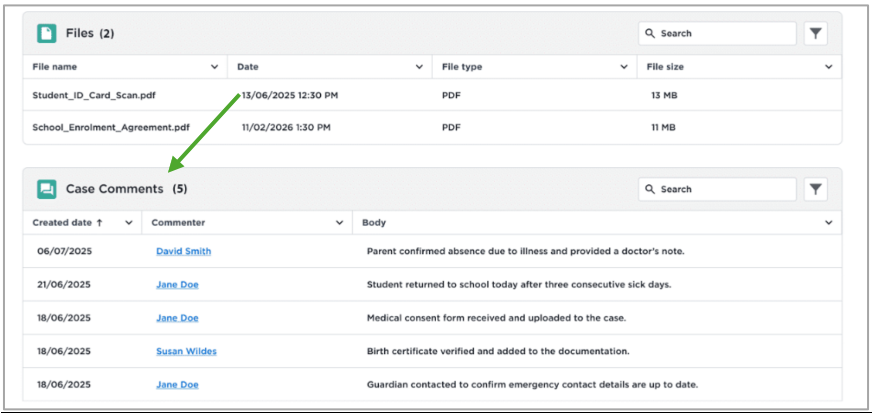
Steps:

1. In the **Active cases** list, use filters or the search field to locate the case you want to view.
2. Click the **Case Number** to open it
3. Navigate to the **Related** tab.



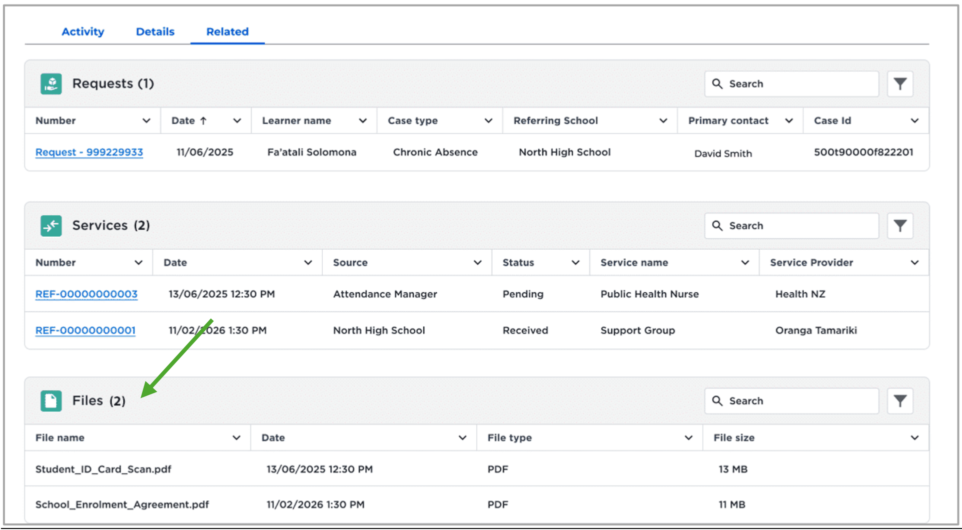
<u>View Shared Comments</u>

4. Scroll to the **Comments** section.
5. View the shared comments listed in the table



<u>View shared Files:</u> Note – this feature will become available after a future release.

6. In the same Related tab, scroll to the Files section.
7. Click on a file to open it



Navigate the Attendance Service home page

Note – the closed cases are not yet visible. These will be visible after a future release.

When you log in you can choose from the following:

- begin a new support request
- pick up where you left off with a draft request
- manage an existing case you're already working on
- review details on a closed case.

Attendance Service Home page

Services
Raise a request for support here.

Draft requests
Resume your draft requests here.

Active cases
View a case record, to see updates and share case comments and documents from here.

Closed cases
View closed cases for your school here.