



Practice Guide – Recording for reporting

Purpose

This practice guide explains how to record key activities in AS-CMS so that they are accurately reflected in quarterly reporting. It outlines what to record, and how measures are assessed.

Key Message

If activities are not recorded in the required way, they will not be reflected in reporting or performance results, even if the work has taken place. Quarterly report dashboards use AS-CMS data, and service level measures are calculated based on what has been recorded correctly in the system.

Step-by-step instructions

For screenshots and step-by-step guidance on recording case activity (e.g. Events and Plans) in the AS-CMS use the [AS-CMS Quick Reference Guides](#).

Ahead of the next report

In Quarter 1, it was identified that some activities (such as initial meetings or student plans) had been completed but were not reflected in reporting.

This occurred where activities were not recorded in AS-CMS in the way required for the system to recognise them.

Ahead of the next report, review your cases to make sure:

- key activities have been completed, and
- they are recorded correctly in the right fields in AS-CMS.

Some requirements from the previous quarter will continue to be assessed where they were not previously met (for example, active migrated cases being assigned and having a student plan in place).

If you want to check the Q2 targets and timeframes, see [Appendix A: Q2 reporting measures and targets](#).

At a glance – what needs to be in place for Q2 quarterly reporting

- Initial School Meeting recorded as an Event (correct Subject + actual meeting date)
- Initial Whānau Meeting recorded as an Event (correct Subject + actual meeting date)
- Student Plan added via Add Plan and status set to In Progress
- Migrated cases: Case Owner assigned + Student Plan in place

How measures are assessed

The table below shows what you need to do in practice, what must be recorded in AS-CMS for the measure to be counted, and how each measure is sourced.

Measure (recording requirements) Note: Targets and timeframes for Q2 measures are listed in Appendix A .	What you need to do	What must be recorded in AS-CMS	Source
Initial School Meeting	Hold the meeting within the required timeframe (see Appendix A)	<ul style="list-style-type: none"> Record the meeting as an Event Choose the Subject 'Initial School Meeting' Record the actual meeting date (See Quick Reference Guide: Add Event)	AS-CMS
Initial Whānau Meeting	Hold the meeting with whānau within the required timeframe (see Appendix A)	<ul style="list-style-type: none"> Record the meeting as an Event Choose the Subject 'Initial Student / Whānau Meeting' Record the actual meeting date (See Quick Reference Guide: Add Event)	AS-CMS
Student Plan	Develop a plan with student, whānau, and school	<ul style="list-style-type: none"> Add the plan using the Add Plan action in AS-CMS* Ensure the plan includes at least one step (action) Set the Plan status to 'In Progress' (Draft Plans won't be counted in reporting). (See Quick Reference Guide: Create and manage a student plan)	AS-CMS
Migrated cases – allocation	Ensure all cases are assigned to a case manager	<ul style="list-style-type: none"> Assign a Case Owner to each case (See QRG: Assign cases)	AS-CMS
Migrated cases – plans	Ensure all cases have a plan in place	<ul style="list-style-type: none"> Add the plan using the Add Plan action in AS-CMS* Ensure the plan includes at least one step (action) Set the Plan status to 'In Progress' (Draft Plans won't be counted in reporting). (See Quick Reference Guide: Create and manage a student plan)	AS-CMS
Re-enrolment measures	Support re-enrolment within required timeframe (see Appendix A)	No action required in AS-CMS	ENROL

* Note: You can upload or attach a plan document (e.g. Word or PDF) to the case, particularly if a plan is already in place and working well. To ensure this is recognised in reporting, you'll also need to create a plan record in AS-CMS using the Add Plan function with at least one step and set the status to In Progress.

Common issues – and what to check

Issue	What may have happened	What to check
Your cases are reported as not meeting SLAs, but the work was completed	Activities were completed but not recorded in AS-CMS in the required way, so they were not recognised in reporting	Check that activities are recorded using the correct method (e.g. Event or Plan) and that all required fields are completed
A case is reported as not meeting the initial meeting timeframe, but the meeting took place	The meeting was not recorded as an Event, or key details (Subject or date) were incorrect, so it was not counted within the timeframe	Check that the meeting is recorded as an Event, with the correct Subject, and that the Event date reflects when the meeting took place (within the required timeframe)
A case is reported as not having a Student Plan, but you have a plan in place	A plan exists in practice but was not recorded using Add Plan, or remains in Draft status, so it is not included in reporting	Check that the plan was created using the Add Plan action and that the status is set to In Progress

Appendix A – Q2 reporting measures and targets (reference)

Case management service level measures (new cases / all referrals)

- Meet (in person) with the referring school (CA) or most recently attended school (NEN) within 5 business days for 80% of referrals
- Meet (in person) with the referring school (CA) or most recently attended school (NEN) within 10 business days for 90% of referrals
- Engage directly with the student and caregiver(s), where current contact details are held, within 10 business days for 80% of referrals
- Engage directly with the student and caregiver(s), where current contact details are held, within 15 business days for 90% of referrals

Outcome measures assessed in Q2

- NEN outcomes: 60% of referred NEN students with up-to-date contact details enrol in a school, or an alternative education pathway, or have a valid exemption, within 10 weeks of allocation to the provider
- Migrated NEN outcomes: 60% of migrated NEN cases enrolled within 15 weeks of referral date (by 17 April 2026)

Re-assessment of migrated case management measures

- All migrated cases reviewed and allocated to a case manager by 3 July 2026
- 90% initial meetings/visits with schools completed and recorded by 3 July 2026
- 90% initial meetings/visits with caregivers completed and recorded by 3 July 2026
- 90% migrated cases have a student plan recorded by 3 July 2026

General (included in the quarterly report narrative)

- Progress against Service Delivery Plan (SDP) key actions/activities for the quarter
 - Risk update
 - Initiatives/innovations addressing barriers to attendance
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What is meant by business days?

For Attendance Service SLAs, business days:

- include weekdays (Monday–Friday), school holidays, and regional public holidays
- exclude weekends and national public holidays

This applies to all service level measures. Some measures use data from external systems such as ENROL and are not affected by how information is recorded in AS-CMS.
