

Access Request: frequently asked questions

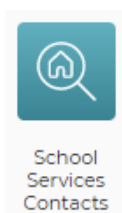
April 2020

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I need to contact my local School Services team for support

Search for your local school services contacts at:



<https://app.education.nsw.gov.au/school-services-contacts/>

or

add the School Services Contacts icon to your portal

To request support with:

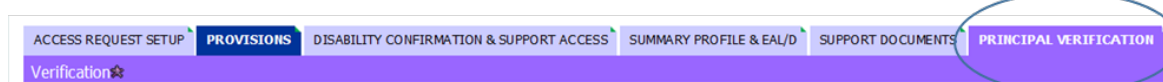
- Access Request technical information and problem solving – School Services rather than EdConnect are best able to offer the most direct and timely support
- additional adjustments that might be considered within the school
- support available externally to the school
- Integration Funding Support summary profile levels and information required
- specialist support classes in mainstream and special schools — availability and advice
- panel information
- Access Request: best practice and required documentation

I need to reopen and access an Access Request with a Validated Status

There are occasions when an Access Request (AR) showing on the school's My Access Request home page will need to be re-opened after it has been '*Validated*'.

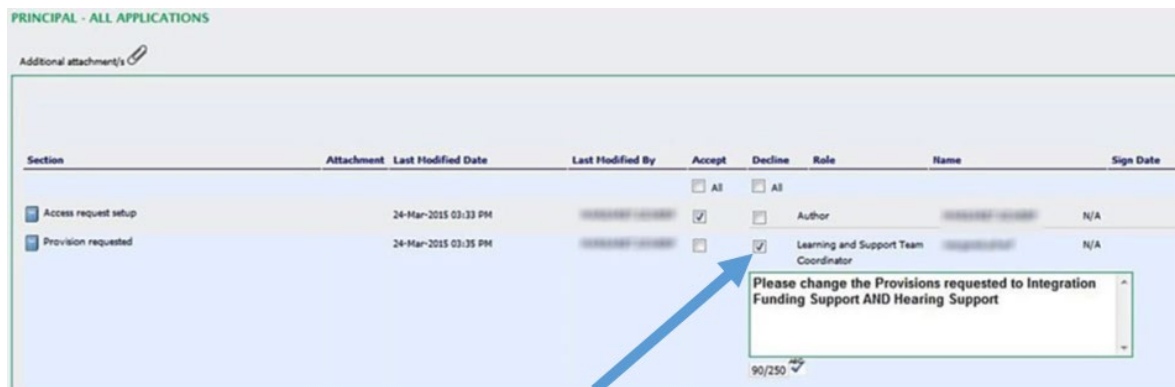
This may occur if the Principal, Parent/ Carer or School Services have requested changes to the student's Access Request.

The Principal clicks on the Principal Verification Tab.



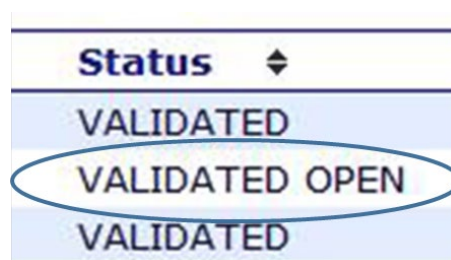
On the Verification page the Principal '*Declines*' the relevant sections only (avoid declining '*All*' as it will mean that every page of the Access Request will need to be reviewed). Once declined, a message box will appear to allow the Principal to indicate the change required.

For changes to participants or the sections that appear in the document the first section "Access Request setup" should be declined so that the School Author can make the necessary changes.

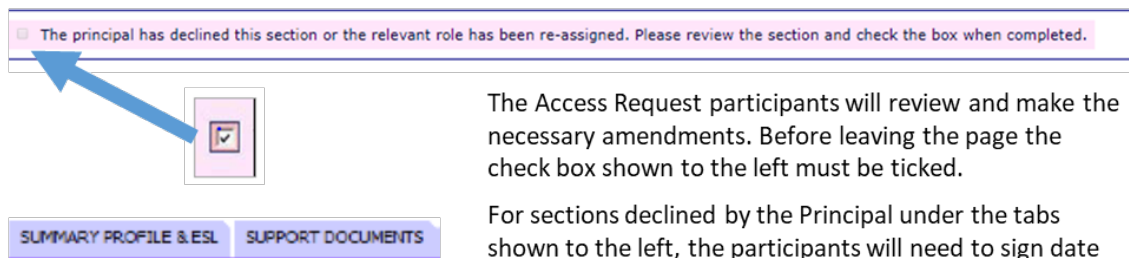


The Principal should then select 'Save & Exit'.

The status of the Access Request will then be 'Validated Open'.



The AR participants can then go into the Access Request to complete the sections declined by the Principal. For each section declined by the Principal the following message box below will appear at the top of the page:



The Access Request participants will review and make the necessary amendments. Before leaving the page the check box shown to the left must be ticked.

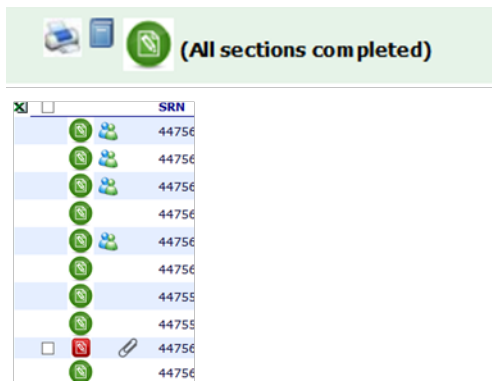
For sections declined by the Principal under the tabs shown to the left, the participants will need to sign date again.

Once all relevant sections have been amended and saved, the status of the AR will change back to 'Validated'. The Principal will be able to go to the Verification page of the Access Request, review and if appropriate accept all sections, sign date and submit.

The Principal is not able to access the Principal Verification page

The Principal is only able to access the verification page and submit an Access Request after all sections have been completed by the participants and the status of the Access Request is 'Validated'.

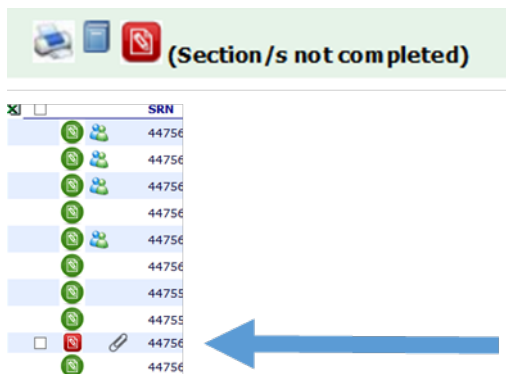
At the top of each Access Request page there are important icons which are used to check the progress of the Access Request.



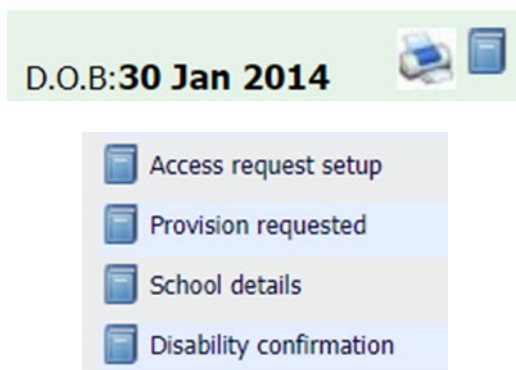
The Access Request summary icon is on the home page to the left of each student's SRN and is also at the top of every page.

A green Access Request Summary icon indicates that all sections of the Access Request have been completed.

The Principal logs into the portal using their own username and password, then into ERN and then selects the Principal Verification tab.



A red Access Request Summary icon indicates that there are still incomplete sections. Select the red icon to see which sections of the AR are incomplete (see screen shot on the next page). Once all sections have been completed by participants the icon will turn green, the Status of will change from 'Open' or 'Validated Open' to 'Validated', and the Principal will then be able to access the Principal Verification page.



The Verification icon (blue filing cabinet) is to the right of the printer icon at the top of every page. Clicking on the Verification icon shows a read only version of the Principal's Verification screen.

On the verification page the Principal can select the icon to the left of each section to check any section without leaving the verification page.

This is also a handy way for participants and School Services staff to check information on the Access Request Setup page.

The red Access Request Summary Icon shows which sections of the Access Request are completed by whom and which sections have not yet been completed (pink background):

| Access Request Summary | | | |
|--|---------------------------------------|---------------------------------------|-----------|
| Section | Role | Name | Completed |
| Access request setup | Author | Author | Completed |
| Provision requested | Learning and Support Team Coordinator | Learning and Support Team Coordinator | Completed |
| School details | Learning and Support Team Coordinator | Learning and Support Team Coordinator | Completed |
| Disability confirmation | Learning and Support Team Coordinator | Learning and Support Team Coordinator | Completed |
| Access to facilities & specialised equipment | Learning and Support Team Coordinator | Learning and Support Team Coordinator | Completed |
| Travel support need | Learning and Support Team Coordinator | Learning and Support Team Coordinator | Completed |
| Risk management | Learning and Support Team Coordinator | Learning and Support Team Coordinator | Completed |
| DEC Support Accessed | Learning and Support Team Coordinator | Learning and Support Team Coordinator | Completed |
| Non DEC Support Accessed | Learning and Support Team Coordinator | Learning and Support Team Coordinator | Completed |
| Summary Profile | Year Advisor | Year Advisor | Declined |
| | Learning and Support Team Coordinator | Learning and Support Team Coordinator | Declined |
| ESL | ESL Teacher | ESL Teacher | Completed |
| | Learning and Support Team Coordinator | Learning and Support Team Coordinator | Completed |
| MH/ED/BD Support | Learning and Support Team Coordinator | Learning and Support Team Coordinator | Completed |
| | School Counsellor | School Counsellor | Completed |
| | District Guidance Officer | District Guidance Officer | Completed |
| Autism Support | Learning and Support Team Coordinator | Learning and Support Team Coordinator | Completed |
| | School Counsellor | School Counsellor | Completed |
| | District Guidance Officer | District Guidance Officer | Completed |
| Hearing Support | Assistant Principal Hearing | Assistant Principal Hearing | Declined |
| Vision Support | Assistant Principal Vision | Assistant Principal Vision | Completed |

I need to change or add sections in the Access Request application

The author completes the set up page and selects the sections that are required and that will appear in the application.

When the status of the application is **Draft** the author selects:

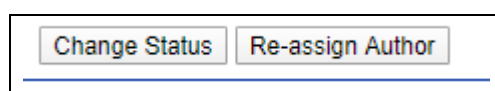
- the student’s year level which creates the correct Summary Profile section
- the disability support sections that will appear in the application
- whether the application is for Integration Funding Support at another school (transition point) which requires the Principal to select the transition school Principal that they have spoken to on their verification page
- whether the application is for a shared enrolment with an ED/BD setting

When the status is **Open** the Author is able to make changes to the Setup page by clicking into the page.

When the status of the Access Request is **Validated or Validated Open** the Principal first needs to decline the first section - Access Request Setup - on the Verification page. The School Author is then able to make changes to the Setup page.

Changing the author on the home page will also make the set up page available. The Principal or any author in the school is able to change the author by selecting ‘Re-assign Author’ and choosing another author in the school.

This is found under the list of student names on the ‘My Access Request’ screen.



I am unable to participate in/sign off on an Access Request

If a staff member's name doesn't appear, check that he/she has been assigned a School Participant role by the Principal of the school in Access Management Utility (AMU).

Participants who work across a large number of schools such as School Psychologists, and who have inadvertently been given the Principal role at one of the schools, can occasionally have difficulties being added to an Access Request even though they have been added in AMU. Please contact your School Services team member so they can refer this overload problem on to the correct resolution team.

Assigning responsibilities to staff members

When the School Author selects specific support documents in the Access Request Setup screen, the program automatically generates the positions in the school required to complete that Access Request.

The School Author adds the names of the school personnel who will be responsible for completing section(s) of the Access Request.

To assign these School Participants, click on the search icon to the right of the role field and select the staff member's name from the list.

The screenshot shows the 'Step 2: Access Request Role Assignment' screen. At the top, there is a section titled 'Please select the relevant support document/s, if applicable:' with a list of checkboxes: English as a second language (ESL), MH/ED/BD Support, Autism Support (checked), Hearing Support, and Vision Support. Below this is a section titled 'Please assign participants to the following roles' with five role fields: *Learning Support Team Coordinator, *Principal, *School Counsellor, *District Guidance Officer, and *Class Teacher. Each role field has a search icon to its right. At the bottom, there are three buttons: Save, Save and Next, and Save and Exit. Red arrows and callout boxes provide instructions: 'Select support documents to generate roles required' points to the top section; 'Click to add names of staff responsible' points to the search icons; and 'Save after adding each name' points to the Save button.

To avoid deleting the names of the assigned school personnel, click <save> each time a name is added.

Delegating roles through the Access Management Utility (AMU)

The Access Management Utility (AMU) provides school-based staff with access to the Enrolment Registration Number (ERN) system including the online Access Request program.

To assign roles, select the ERN application button through the school's AMU on the Home screen.

On-site staff

To assign roles to staff members who are on-site (appointed permanently or temporarily to the school), the Principal of the school:

1. logs on to the Department's portal using his/her personal account and password under Essentials, selects AMU,

or

2. selects the My Applications tab and then the school's AMU
3. under Application of AMU clicks on the <ERN - Enrolment and Registration Number> application
4. assigns the Principal role to himself/herself (Note: the Principal role also includes the School Author actions)
5. assigns the Principal role to another staff member who works full time at the school who will have the authority to submit Access Requests to the Principal Network on behalf of the Principal of the school if required
6. assigns the School Author role to staff members who will set up any Access Requests – preferably not the Principal
7. assigns the School Participant role to staff members who will contribute to any Access Request

Off-site or temporary staff

Staff members who are off-site (not based at the school) or appointed temporarily to the school can be assigned roles as School Author and/or School Participant.

Staff members who are off-site may be added when:

- a student has shared enrolment, between, for example, the census school and a behaviour school (the non-census school)
- a student has transferred from another school and staff from that school are prepared to assist with completing the Access Request
- the Access Request requires a hearing, vision, autism or mental health support document.

To assign roles to off-site or temporary staff, complete the steps 1–3 for on-site staff; confirm the names of the assistant principal hearing, assistant- principal vision, school counsellor, school psychologist, senior psychologist education and any others as required; and then:

1. select the link <Add person not in the list> at the bottom of the school staff list

2. use the <State Wide Staff Search> to find the staff member's name
3. click on the staff member's surname once when it appears below the search button (that name now appears under <Staff Not at this site>)
4. assign that staff member a role before assigning the next Access Request role (if this is not done, that staff member's name will disappear and not be listed under <Staff Not at this site>).

Important note:

Staff who work across a number of schools should not be provided the Principal role in AMU. Each role duplicates across all schools that the staff member is added to. The large amount of coding underlying the Principal role will lead to system overload and problems adding the participant to an Access Request as they are added to additional schools.

To remove a name listed under <Staff Not at this site> de-select any checked boxes.

Enrolment and Registration Number - School

* This is a real-time application, as you make changes on this screen user records & s
 * Some Staff members are listed twice at the same location because they hold two po
 Casual po

Filter

Assign School Authors Assign School Participants Assign Principals

| Staff List | Access Request School Author | Access Request School Participant | ESL Manager | Enquiry Only | Principal | SBSR Group Offer | SB Sch Acti |
|--------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| A M | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| A M | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Bl Al | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| B Je | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| C J L | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| I L | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Staff Not at this site. | | | | | | | |
| B D | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| P K | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Staff located off-site

Add person not in the list. Click & use Statewide Staff Search to add off-site staff

I need to change an Access Request participant

When the status of the Access Request is 'Open' the School Author can access the *Access Request Setup* page and change the participant

When all the sections of an Access Request have been completed and the Access Request has a status of either 'Validated' or 'Validated Open' the School Author and the Principal will see a people icon to the left of the student's SRN on the Home page.

| | SRN | Student Name | Status | Creation | |
|--------------------------|-----------|------------------------|-------------------|----------|--------|
| | 447562782 | ARFive,ARPFive | VALIDATED OPEN | 30 May | |
| | 447562774 | ARFour,ARPFour | VALIDATED | 29 May | |
| | 447562766 | ARThree,ARPTThree | VALIDATED | 29 May | |
| | 447562961 | And,AndOne | IN PROGRESS | 01 Jun | |
| | 447565145 | AndOrOne,AOOne | VALIDATED OPEN | 19 Jul 2 | |
| | 447565153 | AndOrTwo,ATwo | IN PROGRESS | 20 Jul 2 | |
| | 447559544 | AndersonTwo,Andtwo | IN PROGRESS | 15 Mar | |
| | 447555549 | EI,Invention | VALIDATED | 27 Sep | |
| <input type="checkbox"/> | | 447563941 | ExceptionOne,Eone | OPEN | 26 Jun |
| | 447562979 | FridayTest,FTOne | IN PROGRESS | 01 Jun | |
| | 447561140 | GURpreet Wed,Wednesday | IN PROGRESS | 18 Apr | |

The Principal or the Author selects the people icon, chooses a new participant and then saves.

I am unable to complete a section of an Access Request

The Author is only responsible for the Setup page. It is the Learning and Support Coordinator who completes the Provision Requested page and many of the following pages.

As an example:

| Section | Role |
|--|---------------------------------------|
| Access request setup | Author |
| Provision requested | Learning and Support Coordinator |
| School details | Learning and Support Coordinator |
| Disability confirmation | Learning and Support Coordinator |
| Access to facilities & specialised equipment | Learning and Support Coordinator |
| Travel support need | Learning and Support Coordinator |
| Risk management | Learning and Support Coordinator |
| DoE support accessed | Learning and Support Coordinator |
| Non DoE Support Accessed | Learning and Support Coordinator |
| Summary Profile | Year Advisor |
| | Learning and Support Coordinator |
| MH/ED/BD Support | Learning and Support Coordinator |
| | School Counsellor/School Psychologist |
| | Senior Psychologist Education/DGO |

Pages where there is no date and sign to save

Some pages such as School Details do not have a Save and Date. It is important that the participant selects 'Next Page' on the bottom right of the page as this updates the system to recognise that the page has been checked and completed.

Saving and sign dating sections

Assigned School Participants can write their respective sections and save them by clicking *Save* or *Save and exit*. Some sections only require saving while others require the School Participant to sign date them.

This sign date function is a key component in the Access Request program. It requires selecting the current date from the calendar to the right of the *sign date* field.

Completing sections in order

It is possible to draft a section but it cannot be 'sign dated' until the previous School Participant has 'sign dated' his/her section.

Once an assigned School Participant 'sign dates' a section, the program generates an email to the next School Participant. (Schools may opt to disable the email function in ERN.)

When the last School Participant has 'sign dated' his/her section, the program automatically:

- changes all sections to 'read only'
- changes the 'Principal's Verification' screen to 'read/write' and, if additional reports have been included, relocates the paper clip icon to that screen
- sends an email to the assigned Principal notifying him/her that the Access Request is ready to be verified

I am unable to start an Access Request

Confirm student enrolment

Before an Access Request is set up, a student must be:

- 'enrolled (in attendance)' or 'applied to enrol (risk-assessed)' at the census school

OR

- 'pre-enrolled' with a status of registered or applied to enrol (for a student new to the public recognition school system)

Census enrolment

The school where the student has census registration must submit the Access Request.

If a student has an 'applied to enrol (risk-assessed)' registration at another school, the Principal of that school can take responsibility for developing and submitting an Access Request.

Non-census enrolment

If a student has a shared enrolment in a mainstream school and another school, for example a behaviour school, the Principal of the non-census school cannot create or submit the Access Request.

I am unsure what the status of the Access Request means

A student can only have one Access Request active at any one time. A student can, however, have more than one Access request created in a calendar year.

An Access Request is active when its status is 'Draft', 'Open', 'Validated' and 'Validated Open'. Once the school submits the Access Request the active statuses are 'Submitted or 'In Progress'.

| Access Request Status – Active | |
|---------------------------------------|---|
| Draft | Access Request has been created by the Author but the Setup page (Author) and the Provision Requested page (Learning & Support Coordinator) have not been completed |
| Open | The Learning and Support Coordinator has completed the 'Provision Requested section and participants are completing their sections |
| Validated | Participants have completed their sections - awaiting Principal to sign off or decline |
| Submitted | Principal has signed off and submitted the request to School Services |
| In Progress | Received by School Services and actioned in the Access Request Process |
| Validated Open | One or more section/s have been declined by the Principal for review/amendment |

A student can have many inactive Access Requests. An Access Request is inactive when its status is completed, declined or withdrawn.

An Access Request will automatically withdraw itself when it has a status of 'Draft', 'Open', 'Validated' or 'Validated Open' and the Access Request has not changed its status within the last 12 months.

| Access Request Status – Inactive |
|---|
| Completed |
| Declined |
| Withdrawn (by Parent) |
| Withdrawn (by School) |
| Withdrawn (Automatically) |
| Withdrawn (by Principal Network) |

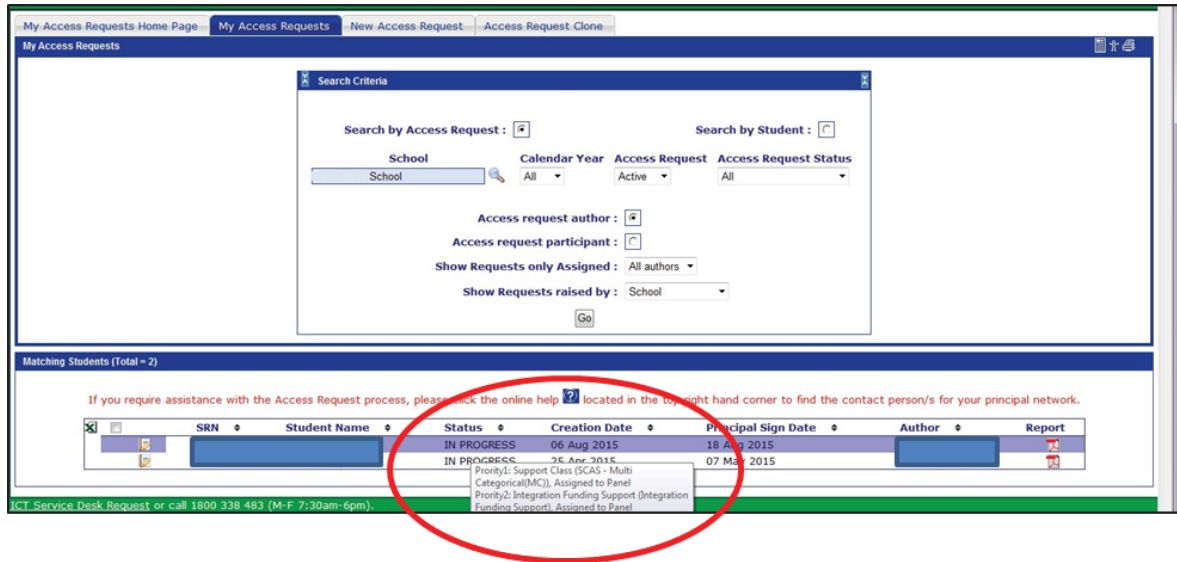
An Access Request that has been withdrawn by the school, parent or Principal Network can be reactivated within 12 months of its creation date.

To reactivate: search 'My Access Requests' with the selection for Access Request showing as 'Inactive' to find the student. Click the tick box next to the student's 'Withdrawn' Access Request and select 'Change Status'. You will now be able to change the status of the Access Request back to what it was prior to being withdrawn.

How do I view the progress of an Access Request

Schools may view the progress of an active Access Request and relevant priorities at any time through the school's 'My Access Requests'.

To view the current status of each priority hover the mouse over the status of the Access Request. A status of 'In Progress' indicates that the Access Request has been submitted and the priority/s is/are being considered by School Services.



How do I change the Author or the Status of the Access Request

On the home page under the list of students with active Access Requests are two buttons visible to the School Author and Principal. Select the button to change the Access Request status or the author. Where possible the author and the Principal should be different participants so two staff members are able to make these changes.

