# Table of Contents

THE ONLINE ACCESS REQUEST ................................................................. 4

WHOLE SCHOOL PLANNING: THE CONTEXT ........................................... 4

PREPARATION .......................................................................................... 5
  Establishing learning needs & available support – School Learning Support 
  Team ........................................................................................................ 5
  Confirming student enrolment – The Principal or School Author .............. 5
  Identifying Access Request status – The Principal or School Author ........... 6
    Active Access Requests .......................................................................... 6
    Inactive Access Requests ...................................................................... 6

ASSIGNING ROLES – THE PRINCIPAL ...................................................... 6

GETTING STARTED .................................................................................. 7
  Logging on ................................................................................................ 7
  Changing personal preferences .................................................................. 8
  Navigating and menu bars ....................................................................... 8
  Using the My Access Requests screen ..................................................... 9

AN OVERVIEW OF ROLES AND RESPONSIBILITIES .............................. 10

SETTING UP AN ACCESS REQUEST – THE SCHOOL AUTHOR .................. 11

MANAGING AN ACCESS REQUEST – THE PRINCIPAL AND THE SCHOOL AUTHOR 12

ACCESS REQUEST WORKFLOW ........................................................... 13
  Access Request Workflow: At a glance .................................................. 15

COMPLETING AN ACCESS REQUEST – THE SCHOOL PARTICIPANT ........ 16
  Using the Access Request Summary ....................................................... 16
  Responsibilities of school participants .................................................... 17

VALIDATING AN ACCESS REQUEST – THE SCHOOL PARTICIPANT .......... 18
**THE ONLINE ACCESS REQUEST**

The online Access Request is used to apply for additional Student Support provisions for a particular student. These provisions can include:

- Support Class in a Regular or Special School e.g. mild (IM), ED
- Integration, Funding Support
- Itinerant or Outreach Support e.g. hearing, vision, behaviour
- Learning Assistance Program (other than school-based STLA) e.g. language, reading, ESSP
- Distance Education for students with significant needs.

**WHOLE SCHOOL PLANNING: THE CONTEXT**

The School Learning Support Team facilitates and coordinates a whole school approach to meeting the learning needs of all students. The membership of the School Learning Support Team is determined by each school according to local needs. The team can include:

- a Learning Support Team Coordinator (usually a member of the school executive)
- the School Counsellor
- teacher representative(s)
- specialist teaching staff e.g. ESL teacher, Reading Recovery teacher, School Learning Support Teacher, Aboriginal Education Officer
- other specialist personnel e.g. school learning support officer(s)
- parent(s)/carer(s), as required.

As part of its functions the School Learning Support Team coordinates support services from within and outside the school that can include Access Requests.

When developing an Access Request, the School Learning Support Team creates a profile of a student's abilities and needs based on the perspectives of teaching staff as well as parent/carer(s). The Class Teacher/Year Advisor provides a detailed description of the student's performance and where learning adjustments are required. The Learning Support Team Coordinator (LSTC) builds on this by adding more information providing a whole school perspective. Parent/carer(s) and specialist staff, including School Counsellor, District
Guidance Officer, Assistant Principal Hearing, Assistant Principal Vision provide additional and specific information.

**PREPARATION**

**EVALUATING LEARNING NEEDS & AVAILABLE SUPPORT – SCHOOL LEARNING SUPPORT TEAM**

Before creating an Access Request it is recommended that the School Learning Support Team:

- clarifies the student's needs
- identifies the support for which the student qualifies
- arranges for any relevant documentation e.g. Disability Confirmation Sheet, Student Behaviour Plan, Health Care Plan to be completed or updated and stored on the school's server
- identifies the support documents and attachments necessary to complete the application
- ensures that contributing staff members understand their responsibilities, the timeline and how to complete their respective sections online.

**CONFIRMING STUDENT ENROLMENT – THE PRINCIPAL OR SCHOOL AUTHOR**

A student must be enrolled or pre-enrolled (with a status of registered or applied to enrol for a student new to the government school system) at the census school before an Access Request is set up.

An Access Request must be lodged by the principal of the school where the student has census registration.

If the student has a shared enrolment, for example in a mainstream school and a behaviour school, the non-census school cannot lodge the Access Request.

---

1 Including students returning to a government school from, for example, a private school or home schooling.
IDENTIFYING ACCESS REQUEST STATUS – THE PRINCIPAL OR SCHOOL AUTHOR

Active Access Requests

A student can only have one active Access Request 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, submitted, assigned to panel, supported or deferred.

Inactive Access Requests

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

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

Go to Identifying Access Request Status (p27) for more detail.

ASSIGNING ROLES – THE PRINCIPAL

The school’s principal must assign the Principal, School Author and School Participant roles to staff through the school’s Access Management Utility before any Access Requests are set up.

These roles can be assigned to staff members who are:

- based at the school as permanent or temporary appointments (on-site)
- based at another school in the case of shared enrolment (off-site)
- based at the student’s previous school and prepared to assist with the Access Request (off-site)
- in a specialist position based at another school e.g. School Counsellor, District Guidance Officer, Assistant Principal Hearing or Assistant Principal Vision (off-site).

It is important that the Principal1 role is assigned to the school’s principal and at least one other staff member who has the authority to submit the Access Request to the region on behalf of the school’s principal should it be required.

---

1 In this document Principal means any staff member delegated the role through the school’s Access Management Utility; principal means the school’s principal.
To assign roles to on-site staff members, the school’s principal logs into the Access Management Utility, selects the <ERN - Enrolment and Registration> application and then clicks on the appropriate checkbox next to the names of the relevant staff members.

To assign roles to off-site staff members, add them to the Staff Not at this site before assigning roles.

Go to Assigning Roles through the Access Management Utility (p21) for more detail.

GETTING STARTED

LOGGING ON

To add specific information or to make changes to any aspect of an Access Request, the Principal, School Author or School Participant must:

1. log on to the Department’s portal using his/her personal account and password
2. select the Enrolment Registration Number (ERN) application button
3. select the My Access Requests tab from the Home Page.
**CHANGING PERSONAL PREFERENCES**

To prevent the system from timing out when completing an Access Request:

1. select the *My Profile* tab on the *Enrolment and Registration Number* (ERN) screen
2. select *General User Preferences*
3. extend the *Inactivity Timeout* period
4. click <Save> (at the bottom of the screen).

For staff working in more than one school, it is also possible to change the default school through the *General User Preferences*.

![General User Preferences](image)

To view the whole entry screen for any section, hide the ERN menu and reduce the screen size to fit your screen. Go to **Changing Screen Size** (p23) for more detail.

**NAVIGATING AND MENU BARS**

There are two menu bars across the top of every screen of an online Access Request as well as tabs for each section and screens for each sub section.

A star next to a sub section’s title indicates that that School Participant has a mandatory field to complete within it. Hovering the mouse over each tab within an Access Request reveals its sub sections. Move the cursor to the desired section and click once to go to that section.
The dark green menu bar includes the School Name and the name of the School Author. To view My Reports, print the current page, change personal profile or go to Online Help click on the icons on the dark green menu bar.

The light green menu bar includes student information, e.g. the student registration number (SRN), student name and correspondence name for the parent/carer. It also includes the icon to print the whole file and another to view a read only copy of the Principal’s Verification page.

Hovering the mouse over a student's name in the search results on the My Access Requests screen reveals the student's gender and date of birth.

Online Help is available on every page. It includes detailed information to assist with completing that section or sub section. For phone numbers and email addresses of regional contacts go to Online Help from the My Access Requests screen.

For descriptions of the icons used go to Icons.

**USING THE MY ACCESS REQUESTS SCREEN**

The My Access Requests screen enables the Principal, School Author and School Participant to search, monitor, manage and track Access Requests.

There are two search options. To search by Access Request, select the Access Request button first and then one or more of the filters.
To search by student, select the Student button and enter the student’s family name or first name or student registration number (SRN).

Go to Using the My Access Requests screen (p31) for more information.

AN OVERVIEW OF ROLES AND RESPONSIBILITIES

There are three roles associated with an online Access Request: the Principal, School Author and School Participant. The online Access Request program pre-determines the actions that can be taken by each of these roles.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Principal</th>
<th>School Author</th>
<th>School Participant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign roles through the school's Access Management Utility</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confirm student enrolment</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Identify Access Request status</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Create a new Access Request</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Select support documents required</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assign responsibilities to School Participants to complete specified sections</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete assigned sections</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Add attachments e.g. Disability Confirmation Sheet</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Add and delete support documents (through the Set Up screen)</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reassign responsibilities to complete sections (through the Set Up screen)</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Verify an Access Request</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit to region</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Track the progress of an Access Request</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
SETTING UP AN ACCESS REQUEST – THE SCHOOL AUTHOR

The School Author uses the Set Up screen to create and manage an Access Request. This can include:

- assigning responsibilities to School Participants or assigning more than one responsibility to a School Participant
- re-assigning responsibilities from one School Participant to another, for example if a staff member takes leave (which removes the confirmation sign date of the previous School Participant but not the content)
- adding support documents as required
- deleting a support document which also permanently deletes the information contained in it.

To set up a new Access Request, the School Author:

1. selects the New Access Request tab
2. provides the student’s personal information by:
   - completing a Registration Search for the student - filling in the Search Details including the student’s surname, first name, gender and date of birth
   - creating a New Access Request from the Registration Search Result for that student by clicking on <Create/Modify Access Request>
   OR
   - completing a quick registration (p23) for a student new to the government school system by clicking on <Create New Student and New Access Request>

![Registration Search Result](image)
3. completes the Set Up screen by:

- selecting the **Summary Profile** (p25)
- selecting **Support Attachments** (p25) (if required)
- selecting either a **Shared Enrolment** (p24) or **Integration Funding Support at another school** (p24) (if required)
- assigning responsibilities to each School Participant.

The online Access Request program generates an automated email informing School Participants of their assigned responsibilities. This email includes a hotlink to the DEC portal so that School Participants can log on, view and complete their sections of the Access Request.

**MANAGING an Access Request – The Principal and the School Author**

The School Author uses the Set Up screen to manage an Access Request that is draft or open. This can include:

- re-assigning responsibilities from one School Participant to another, for example if a staff member takes leave (this removes the previous School Participant’s **sign date** but not the content)
- adding support documents as required
- deleting a support document which also permanently deletes the information in it

A summary is produced for an Access Request after the School Author has set up it up. This summary lists the sections, the assigned School Participants and whether each section is completed or not. The Access Request Summary appears as a yellow icon next to the student's name in the **My Access Requests** screen.

Use the **My Access Requests** screen to search for Access Requests when changes to roles or status are necessary. The search produces a student list with a checkbox to the left of the student's name and buttons on the bottom of the page. Select the:

- blue and green <Reassign Roles> icon and make changes in the next screen (this icon only appears for validated Access Requests that have not been submitted to region)
the <Change Status> button to choose from validated, open or draft
➢ the <Re-assign Author> button to change the School Author.

The Principal can also change the status of a validated Access Request to withdrawn (parent, school) or from withdrawn (region) to validated by clicking on <Change Status>.

Go to Access Request Status Flow for more information.

**ACCESS REQUEST WORKFLOW**

After the School Author has assigned responsibilities and the LSTC has completed the Provision Requested section, School Participants can write their respective sections simultaneously.

This means that more than one person can write in an Access Request at any one time, however, only one person can write in one screen at a time. For example, the Class Teacher/Year Advisor can write the Summary Profile while the LSTC completes the Disability Confirmation section. The LSTC, however, cannot complete the Access Domains section while the Class Teacher/Year Advisor is writing the Summary Profile. This situation also applies to sections where support documents have been selected.

The sign date function is the key component in the Access Request workflow. School participants can write their respective sections and save them by clicking <save> or <save and exit>. It is possible to draft a section but not to sign date until the previous School Participant has sign dated his/her section.

Once a School Participant completes the sign date section, the program generates an email to the next School Participant. For example, when a Class Teacher/Year Advisor sign dates a section that requires an additional comment from the LSTC and/or the School Counsellor and the District Guidance Officer, the program generates an email to him/her indicating that that section is now ready for comment and sign date.
These emails are generated in a pre-determined order, e.g.

- the LSTC completes and *sign dates* the Autism section which generates an email to the school counsellor
- the School Counsellor provides a comment and *sign dates* it which generates an email to the District Guidance Officer.

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*
- sends an email to the Principal notifying that the Access Request is ready to be verified.

Go to [email notifications](p26) for more information.
ACCESS REQUEST WORKFLOW: AT A GLANCE

Access Request  8 August 2011
**Completing an Access Request – The School Participant**

The School Participant:
- provides all the information required in each assigned section
- adds attachments (if required)
- confirms the completed section(s) by sign date in order to generate an email notification to the next School Participant.

A School Participant can only write in the assigned section(s) but can view the entire application by clicking through the screens.

Some sections require an attachment that provides additional, specific information about the student. These could include, for example, Disability Confirmation Sheet (DCS), Behaviour Support Plan, Health Care Plan, Audiogram (detailing hearing impairment) or a Vision Report (detailing vision impairment). A paperclip on a screen indicates that an attachment might be required. More than one of these can be added if necessary. Go to Including attachments (p30) for more information.

Information from other files or Access Requests can be copied into a new Access Request. Go to Copying Information from Other Files (p26) for more information.

The current page or a complete PDF version of an Access Request can be printed by clicking on the respective icons on any screen. Go to Printing an Access Request (p30) for more information.

**Using the Access Request Summary**

A summary screen is produced for each Access Request. It lists the sections allocated to each School Participant and whether or not these sections have been completed.

To view a summary, search for the Access Request in the My Access Requests screen and click on the yellow icon to the left of the student's name.

The blue Verification icon on the light green menu bar provides similar information from within an Access Request.

Go to Icons for more information.
## Responsibilities of School Participants

<table>
<thead>
<tr>
<th>Section</th>
<th>Sub section</th>
<th>LSTC</th>
<th>CT or YA</th>
<th>ESL Teacher</th>
<th>School Counsellor</th>
<th>District Guidance Officer</th>
<th>AP Hearing or AP Vision</th>
<th>Principal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Provisions</strong></td>
<td>Provision Requested</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>School Details</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Disability Confirmation &amp; Support Access</strong></td>
<td>Disability Confirmation</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Access to Facilities &amp; Specialised Equipment</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Travel Support Needs</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Risk Management</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>DET Support Accessed</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Non-DET Support Accessed</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Summary Profile &amp; ESL</strong></td>
<td>Summary Profile: KLA &amp; Comment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Summary Profile: Access Domains &amp; Comment or</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Summary Profile: Access Domains, Integration Funding Support Comments &amp; Levels</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Summary Profile: Early Intervention inc children with Sensory Impairment prior to school</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Summary Profile: Newly enrolling in Kindergarten</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>English as a Second Language: Scales, Level &amp; Comment, Settlement Issues</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>English as a Second Language: LSTC Comment</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Student Comment (if applicable)</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Support Documents</strong></td>
<td>MH/ED/BD Support: Previous Intervention, Risk Management, Comment</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>MH/ED/BD Support: School Counsellor Comment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>MH/ED/BD Support: DGO Comment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Autism Support : Previous Intervention, Impact, Risk Management, Comment</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Autism Support: School Counsellor Comment</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Autism Support : DGO Comment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Hearing Support</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision Support</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Learning Assistance Program</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>LSTC Comment</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Verification</strong></td>
<td>Supporting Documentation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Parent/Carer Signature &amp; Comment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Principal Comment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>
VALIDATING AN ACCESS REQUEST – THE SCHOOL PARTICIPANT

An Access Request is validated when:

- each School Participant has sign dated his/her section(s)
- the LSTC has completed all assigned sections including the School Details section.

The program then automatically:

- changes the Access Request to read only
- changes the Principal’s Verification screen to read/write
- changes the Access Request’s status to validated.
- sends an email to the Principal notifying him/her that the Access Request is ready to be verified.

Once an Access Request has been sign dated by all School Participants, no further changes can be made to the application unless the Principal declines a section.

VERIFYING AND SUBMITTING AN ACCESS REQUEST – THE PRINCIPAL

The Principal is responsible for verifying an Access Request before submitting it to the region.

The Principal has read only access to an Access Request except for the Principal’s Verification Screen. This screen becomes read/write when the School Participants have completed and sign dated all sections.

After receiving an email that an Access Request has been validated, the Principal:

1. clicks on the Support Documents tab
2. selects Verification
3. reviews all sections:
   - ensuring that each section is accurate and has the correct attachment (if required)
   - declining, if necessary, any sections that require further information or clarification
4. accepts all sections by ticking the appropriate checkboxes.
DECLINING A SECTION

The Principal can decline as many sections as necessary in order to provide a coherent and consistent Access Request.

Sections can be declined more than once without waiting for the Access Request to be revalidated. If a section has sub-sections and only one of these sub-sections was declined, the Principal, will need to wait for the status to change to validated before declining another sub-section within that section.

If a different support document is needed or a role needs to be reassigned, the Principal must decline this on the Set up screen by ticking the decline box so that the School Author can make the necessary change(s).

When a section is declined, the program automatically:

- creates a text box for each declined section so that the Principal can record what needs to be changed
- generates an email to the School Participant that includes the Principal’s comments
- re-sets the Access Request’s status to validated-open
- makes that section read/write so that the School Participant can amend it.

The School Participant must then make the changes and sign date the section.

To review the Principal’s comments click in the decline box again. Comments are deleted once the section is accepted.
OBTAINING PARENT/CARER’S COMMENT AND SIGNATURE

Once the Access Request has been validated and verified, the Principal (or delegate) must provide a full copy to, and discuss the application with, the parent/carer.

The parent/carer endorses the Access Request by writing comments (if desired) and signing the hardcopy. A copy of this page is kept at the school.

The Principal then sign dates the online version on behalf of the parent/carer and adds any comments.

SUBMITTING TO THE REGION

To endorse the Access Request, the Principal:

1. writes a comment and sign dates it

2. ticks the box indicating that a hard copy (that includes all attachments and the parent/carer’s comments and signature) is stored securely at the school

3. clicks <Save> or <Save and Exit> and then <Submit to region>.

When the Principal clicks on <Submit to region> the program automatically:

- compiles the Access Request into a ‘zip’ file that includes PDFs of the application and any attachments
- emails it to the region with a receipt emailed to the Principal
- saves a copy on the ERN server
- changes the application’s status to submitted.
# The Access Request Process: In Summary

**For a student enrolled at the school**

<table>
<thead>
<tr>
<th>Action</th>
<th>Steps</th>
<th>RESPONSIBILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Principal</td>
</tr>
<tr>
<td><strong>Preparation</strong></td>
<td>Confirm that no active Access Requests are pending</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Set up through New Access Request screen</strong></td>
<td>Identify the student by entering details in the search screen</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create a new Access Request by clicking on &lt;Create/modify Access Request&gt;</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Go to Set up screen and select support documents e.g. Mental Health, Autism, Learning Assistance Program (if required)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assign responsibilities to specific staff members including the Principal to complete support documents</td>
<td></td>
</tr>
<tr>
<td><strong>Complete through My Access Requests screen</strong></td>
<td>Complete and sign date assigned sections</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Add attachments e.g. Disability Confirmation Sheet, Audiogram (if required)</td>
<td></td>
</tr>
<tr>
<td><strong>Verify through Principal’s Verification screen</strong></td>
<td>Review validated Access Request</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Decline sections that need clarification or amendment (if necessary)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Print hardcopy, discuss with parent/carer, obtain written comments (if desired) and signature</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Complete parent/carer comments and endorsements, Principal's comments and sign date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Print final copy, attachments and parent/carer comments and store securely at the school</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Submit to region</td>
<td></td>
</tr>
</tbody>
</table>

1 The principal can delegate this to another staff member as appropriate.
## For a student new to the government school system

<table>
<thead>
<tr>
<th>Actions</th>
<th>Steps</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Preparation</strong></td>
<td>Conduct deep search of ERN to ensure that the student does not have SRN</td>
<td>Principal: ✔</td>
</tr>
<tr>
<td><strong>Set up through New Access Request screen</strong></td>
<td>Create a new Access Request by clicking on &lt;Create New Student and New Access Request&gt;</td>
<td>Principal:</td>
</tr>
<tr>
<td></td>
<td>Complete a Quick Registration</td>
<td>School Author: ✔</td>
</tr>
<tr>
<td></td>
<td>Go to the Set Up screen and select support documents e.g. Mental Health, Autism, Learning Assistance Program (if required)</td>
<td>Principal:</td>
</tr>
<tr>
<td></td>
<td>Assign responsibilities to specific staff members including the Principal</td>
<td>School Author:</td>
</tr>
<tr>
<td><strong>Complete through My Access Requests screen</strong></td>
<td>Complete and sign date assigned sections</td>
<td>Principal:</td>
</tr>
<tr>
<td></td>
<td>Add attachments, e.g. Disability Confirmation Sheet, Audiogram (if required)</td>
<td>School Author:</td>
</tr>
<tr>
<td><strong>Verify through Principal’s Verification screen</strong></td>
<td>Review validated Access Request</td>
<td>Principal:</td>
</tr>
<tr>
<td></td>
<td>Decline sections that need clarification or amendment (if necessary)</td>
<td>School Author:</td>
</tr>
<tr>
<td></td>
<td>Print hardcopy, discuss(^1) with parent/carer, obtain written comments (if desired) and signature</td>
<td>Principal:</td>
</tr>
<tr>
<td></td>
<td>Complete parent/carer comments and endorsements, Principal’s comments and sign date</td>
<td>School Author:</td>
</tr>
<tr>
<td></td>
<td>Print final copy, attachments and parent/carer comments and store securely at the school</td>
<td>Principal:</td>
</tr>
<tr>
<td></td>
<td>Submit to region</td>
<td>Principal:</td>
</tr>
</tbody>
</table>

\(^1\) The principal can delegate this to another staff member as appropriate.
THE ACCESS REQUEST PROCESS: A FLOWCHART

Access Request 8 August 2011
MORE DETAILED INFORMATION

ASSIGNING ROLES THROUGH THE ACCESS MANAGEMENT UTILITY

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

To assign roles, select the ERN application button through the school's Access Management Utility 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:

1. logs on to the Department's portal using his/her personal account and password
2. selects the My Applications tab and then the school's Access Management Utility
3. clicks on the <Enrolment and Registration Number> application
4. assigns the Principal and the School Author roles to his/herself
5. assigns the Principal and School Author roles to another staff member who has the authority to submit the Access Request to the region on behalf of the school's principal if required
6. assigns the School Author role to the staff member(s) who will oversee the Access Request
7. assigns the School Participant role to each staff member who will provide specific information.
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. This situation can arise when, for example:

- a student has shared enrolment, between, for example, the census school and a behaviour school (non-census school)
- a student has transferred from another school and staff from that school are prepared to assist with completing the Access Request
- an 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, District Guidance Officer and others (if 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>).

When this action is successful, the check box turns green. Log a call with the ICT Service Desk on 1800 338 483 if a checkbox turns red. To remove a name listed under <Staff Not at this site> de-select any checked boxes i.e. School Author or School Participant.
CHANGING SCREEN SIZE

To view the whole entry screen for any section, hide the ERN menu and reduce the screen size (for example to 90%) to fit.

COMPLETING A QUICK REGISTRATION FOR AN ACCESS REQUEST

This action is necessary if a student is new to the government school system.

As creating a New Student and New Access Request for an existing student will generate another, unnecessary SRN, it is essential that the School Author conducts a deep search of the ERN before proceeding.

Once the School Author is confident that the student does not have an SRN:

1. click on <New Student and New Access Request>

2. complete the following fields:
   - parent/carer’s family and given name, daytime or mobile number, correspondence name and address
   - student’s country of birth (if not known select <Other>) and residency status (if not known select <Unknown/not provided>).
Completing the Set Up Screen

Integration, Funding Support for a student transitioning to another school

The census school can apply for Integration, Funding Support to assist a student making the transition from, for example, Year 6 to Year 7 or from a government preschool or early intervention program to Kindergarten.

Selecting this box on the Set Up screen creates a field on the Verification screen that requires the Principal to discuss the Access Request with the principal of the new school.

Shared Enrolment

A shared enrolment applies when a student attends two or more schools for a period of time.

Go to Online Help on the Set Up screen for Procedures for shared enrolment status of students accessing specialist educational settings. These procedures ensure that each student has a unique student registration number.

Selecting the shared enrolment provision creates a field in the Verification screen for the principal to confirm that the student remains enrolled at the home school as a census enrolment.
**Summary Profile**

The program defaults to one of the first three checkboxes depending on the student's grade.

These defaults can be changed by the School Author if required e.g. the Summary Profile newly arriving in Kindergarten can replace the default Summary Profile K-6. If the student is new to the government school system, the School Author needs to select the most appropriate option.

**Support Documents**

For students needing Autism, Mental Health, Behaviour, Emotional Disturbance, Hearing Impairment and/or Vision Impairment support, the relevant support documents need to be selected in the Set Up screen.

Selecting these support documents determines the School Participant responsible for completing sections or sub sections of an Access Request e.g. selecting Autism Support requires the LSTC, School Counsellor and DGO to complete sections.

Support for students is not determined or restricted by the student's current setting, e.g. mainstream, special school, support class, itinerant support, distance education school or centre or access to the Integration, Funding Support program.

No support documents are required for a student with an intellectual or physical disability who requires additional support. Information relevant to these provisions is contained within the Access Request application.
**COPYING INFORMATION FROM OTHER FILES**

To copy comments from an *inactive* Access Request into a *new* Access Request:

1. create a new Access Request
2. search for the student's Access Request through the Search Screen on *My Access Requests*
3. go to *My Reports* and click on *Download* (under Get The Report)
4. open the PDF of the *inactive* Access Request
5. select the section to be copied and then *Edit* and *<Ctrl C>* from the menu bar to copy the comments
6. return to the new Access Request, place the cursor at the relevant section and paste *<Ctrl V>*.

To copy comments from other files:

1. create a new Access Request
2. open the file
3. highlight the section to be copied and copy it *<Ctrl C>*
4. return to the new Access Request, place the cursor at the relevant section and paste *<Ctrl V>*.

**EMAIL NOTIFICATIONS**

The program generates emails automatically that include a hotlink to the DEC portal and notify:

- each School Participant when a section is ready to be completed
- a School Participant (two working days from set up, five working days from set up and 10 working days from set up) that a section needs completing (if required)
- a School Participant that previous sections are complete and ready for the next School Participant to complete his/her section e.g.
  - the Classroom Teacher/Year Advisor completes the Summary Profile which generates an email to the LSTC
  - the LSTC completes the LSTC comments.
- the Principal that all sections of an Access Request are complete and validated
- a School Participant when the Principal declines a section and includes the Principal’s comment.
<table>
<thead>
<tr>
<th>Icon</th>
<th>Action</th>
<th>Location</th>
<th>Use to…</th>
</tr>
</thead>
<tbody>
<tr>
<td>🗂️</td>
<td>Attach a file</td>
<td>within a section or next to section on Principal’s Verification screen</td>
<td>add or review an attachment or support document</td>
</tr>
<tr>
<td>�ControlEvents</td>
<td>Change profile</td>
<td>dark green menu bar</td>
<td>extend time out, change default school and set other personal preferences</td>
</tr>
<tr>
<td>⭐️</td>
<td>Complete this section</td>
<td>next to section tabs</td>
<td>find out which sections and sub-sections have been allocated for completion to the School Participant who is logged in</td>
</tr>
<tr>
<td>📝</td>
<td>Go to My Reports</td>
<td>dark green menu bar</td>
<td>retrieve reports and pdfs of Access Requests</td>
</tr>
<tr>
<td>🤔</td>
<td>Online help</td>
<td>dark green menu bar</td>
<td>refer to specific information and advice about completing that screen</td>
</tr>
<tr>
<td>📚</td>
<td>Print current page</td>
<td>dark green menu bar</td>
<td>print a screen dump</td>
</tr>
<tr>
<td>📑</td>
<td>Print file</td>
<td>light green menu bar</td>
<td>print a pdf of the Access Request – retrieve it from My Reports or the email attachment</td>
</tr>
<tr>
<td>🔄️</td>
<td>Re-assign roles</td>
<td>next to student’s registration number (SRN) on search results (My Access Requests screen)</td>
<td>re-assign roles within a validated Access Request that has not been submitted to region (only visible to School Author and Principal)</td>
</tr>
<tr>
<td>📁</td>
<td>View Access Request</td>
<td>Statewide Student Inquiry search (in ERN)</td>
<td>retrieve pdf of Access Request</td>
</tr>
<tr>
<td>📄</td>
<td>View file in portable document format (pdf)</td>
<td>in the search results at the end of the line with the student’s name (My Access Requests screen)</td>
<td>view or print current Access Request</td>
</tr>
<tr>
<td>📝</td>
<td>View Principal’s Verification screen</td>
<td>light green menu bar and in the Set Up screen</td>
<td>access a read only version to find out who has been assigned to a section and if it has been completed.</td>
</tr>
<tr>
<td>📄</td>
<td>View Summary screen</td>
<td>next to student’s registration number (SRN) on search results (My Access Requests screen)</td>
<td>access a read only version to find out who has been assigned to a section and if it has been completed.</td>
</tr>
</tbody>
</table>
Identifying Access Request Status

Active Access Requests

An Access Request is active when its status is draft, open, validated, submitted, assigned to panel, supported or deferred. An Access Request can remain active for more than 12 months.

To identify active Access Requests, the Principal or School Author selects the Access Request tab, changes the Access Request filter to <Active> and clicks <Go>.

A list of students and the status of each active Access Request appears. Click on the student’s name to view the Access Request.

Inactive Access Requests

An Access Request is inactive when its status is completed, declined or withdrawn. An Access Request that is completed or declined cannot be made active.

An Access Request that has been withdrawn by the school, region or parent can be reactivated only if it is within 12 months of its creation date. The Principal or School Author can change its status from withdrawn to its previous status (i.e. draft, open or validated) by checking the box at the end of the row with the student’s name and selecting <Change Status>.

To identify inactive Access Requests, the Principal or School Author changes the Access Request filter to <Inactive> and clicks <Go>. A list of students and the status of each inactive Access Request will appear.
## Status definitions

<table>
<thead>
<tr>
<th>Status</th>
<th>What's happened?</th>
<th>Who can change the status?</th>
<th>What changes are possible?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Active</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Draft</td>
<td>Access Request set up.</td>
<td>School Author or Principal</td>
<td>withdrawn (school or parent)</td>
</tr>
<tr>
<td>Open</td>
<td>School Author assigned responsibilities. LSTC completed Provision Requested. Sections ready for School Participants to complete.</td>
<td>School Author or Principal</td>
<td>withdrawn (school or parent)</td>
</tr>
<tr>
<td>Validated</td>
<td>All sections completed and sign dated by School Participants. All sections reviewed and accepted by the Principal. Parent/carer supports the application. Principal comments completed and application submitted</td>
<td>Principal</td>
<td>open (if the Principal declines section)</td>
</tr>
<tr>
<td>Submitted</td>
<td>Access Request checked and assigned to a Placement Panel.</td>
<td>Assigned Regional Personnel</td>
<td>validated e.g. if modifications are needed or the Placement Panel requests further clarification from the school assigned to panel withdrawn (region)</td>
</tr>
<tr>
<td>Assigned to Panel</td>
<td>Placement Panel makes determination.</td>
<td>Assigned Regional Personnel</td>
<td>validated e.g. if the Placement Panel requests further clarification from the school withdrawn (region) supported deferred declined completed</td>
</tr>
<tr>
<td>Supported</td>
<td>Placement Panel supports Access Request. Access Request waiting on confirmation from parents/carers and/or state office for Integration, Funding Support.</td>
<td>Assigned Regional Personnel</td>
<td>validated e.g. if State Office requests further clarification re Integration, Funding Support withdrawn (region) assigned to panel completed deferred declined</td>
</tr>
<tr>
<td>Deferred</td>
<td>Access Request waiting for a suitable vacancy or for Placement Panel to make further determination.</td>
<td>Assigned Regional Personnel</td>
<td>submitted (which can be changed to assigned to panel) withdrawn (region) validated</td>
</tr>
<tr>
<td><strong>Inactive</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Withdrawn (school or parent)</td>
<td>Access Request cancelled. It can be re-activated, and returned to its previous status, if it is within 12 months of its creation date and there is no active Access Request pending.</td>
<td>School Author or Principal</td>
<td>draft open validated</td>
</tr>
<tr>
<td>Withdrawn (region)</td>
<td>Access Request cancelled. It can be re-activated, and returned to its previous status, if it is within 12 months of its creation date and there is no active Access Request pending.</td>
<td>Principal</td>
<td>validated</td>
</tr>
<tr>
<td>Completed</td>
<td>Access Request is finalised. A new Access Request can be created.</td>
<td></td>
<td>No change possible.</td>
</tr>
<tr>
<td>Declined</td>
<td>Access Request declined by the Placement Panel. A new Access Request can be created.</td>
<td></td>
<td>No change possible.</td>
</tr>
</tbody>
</table>
INCLUDING ATTACHMENTS

To add a completed attachment:
1. click on the paperclip to go to the Browse screen
2. click <Browse> and then go to where the document has been saved
3. click on the document
4. click <Open>
5. click <Attach>
6. check that the files appear in the new screen on the top of the page and then close the Browse screen.

Repeat this process to include additional attachments.

To check that a document is attached, double click on the paper clip icon.

PRINTING AN ACCESS REQUEST

To print the current page from any screen click on the printer icon on the dark green menu bar. To print a full copy from:
1. the My Access Requests screen:
   • search for a particular student’s Access Request
   • click on the PDF icon under the Report heading at the end of the row.
2. any screen in an Access Request:
   • click on the printer icon on the light green menu bar.
If an Access Requested has been created by another school and is *submitted, assigned to panel, supported, completed or deferred*, the principal of the school where the student is now enrolled (or registered to enrol) can print that Access Request.

Go to the ERN, select the Student Enquiry tab and enter the student’s details. A yellow icon to the right of the student’s family indicates an Access Request. Click on this icon to generate the *Access Request Details* screen. A PDF icon at the end of the row indicates that an Access Request can be printed.

In each of the above situations, the program sends a PDF of the Access Request to *My Reports* and generates an email with the PDF file attached. This PDF includes a watermark showing the application’s status e.g. *draft, open, validated, submitted, assigned to panel* and the date of the latest status change. This file can also be printed or forwarded from that email.

**USING THE *My Access Requests* SCREEN**

View all Access Requests raised by an individual by changing the default setting from *<All School Authors>* to *<Show Requests only assigned to me>*. (School Participant or School Author)

Use the Access Request Summary icon to view sections allocated to each School Participant and whether or not they are complete. (School Participant or School Author)

Re-assign a School Author by checking the box against one or more students and then clicking on *<Reassign School Author>*. (School Author role or Principal role)

Withdraw a *draft* or *open* Access Request by clicking the box to the left of the student’s name and then *<Change Status>*. (School Author role or Principal role)
Re-activate an Access Request that is withdrawn by school or parent to its previous status by clicking the box to the left of the student’s name and then <Change Status>. (School Author role or Principal role)

Re-assign roles for a validated Access Request that has not been submitted to region by clicking on the blue and green icon next to the student’s name to go to the Set Up screen. (School Author or Principal role)

Change the status of a validated Access Request to withdrawn (parent, school) by clicking the box to the left of the student’s name and then <Change Status>. (Principal role)

Track the progress of an Access Request submitted to the region by changing the filter to:

- <Active> to show when an Access Request has been assigned to panel, supported or deferred
- <Inactive> to show when an Access Request has been completed, declined or withdrawn.